# Superlist Environment 2022

Which efforts do Belgian supermarkets make to create a more sustainable food system.

## Acknowledgments

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Questionmark Foundation

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**Partners**
Superlist Environment 2022 was developed in collaboration with Rikolto, Test Aankoop, Bond Beter Leefmilieu, FoodWIN, BOS+, Canopea and Ecoconso.

**Funding**
Belgian Superlist research is made possible thanks to the financial support of Rikolto, Test Aankoop, the Belgian Development Cooperation (DGD) and EU LIFE.

Version 1.0 - November 2022

# Contents

# Sustainable food is not yet the norm in Belgian supermarkets

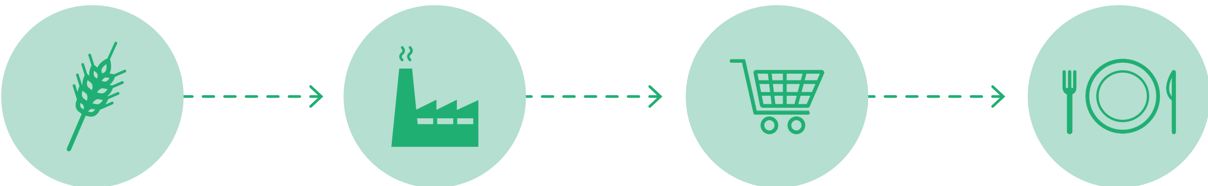
## SUMMARY

Supermarkets can dramatically increase their efforts in making the food system sustainable. Although there are promising practices across all supermarkets, supermarkets in Belgium currently do not considerably contribute to a more plant-based diet, sustainable food, and less food waste. These are the main findings of Superlist Environment Belgium 2022, obtained by evaluating policy, assortment, promotions and in-store tactics. By entering into dialogue with each other (civil society actors and policy makers) supermarkets can greatly increase their impact on transitioning towards a sustainable food system.

What we eat has a major impact on our planet. Accounting for a large part of all food consumption in Belgium (Vlaamse overheid, 2019), supermarkets have a large responsibility in making our food system sustainable. Supermarkets[1] acknowledge this responsibility by committing to agreements such as the Flemish Green Deal on Protein Transition, and by highlighting efforts to reduce environmental impacts towards their customers.

Superlist Environment assesses what supermarkets are doing to effectively contribute to the protein transition, sustainable agriculture and the fight against food waste. Superlist is an initiative of the think tank Questionmark, executed in collaboration with Rikolto, Test Aankoop, Bond Beter Leefmilieu, FoodWIN, BOS+, Canopea and Ecoconso.

The research method has been developed by Questionmark, under advisement of the Scientific Council. Supermarkets also had the opportunity to give feedback on the research method, prior to its publication.



## Ranking and findings

All major Belgian supermarkets work to improve sustainability and make pledges towards various environment oriented agreements and round tables. However, supermarkets mainly place the responsibility for choosing sustainably on the customers. In some cases they even incentivise customers to do the opposite.

1 The five largest supermarket chains in Belgium are taken into account: Carrefour (17.9%), Delhaize (22.8%), Colruyt (25.7%), Aldi (10.6%) and Lidl (7.4%), resulting in a total market share of 84.4% (Gondola, 2021).

## Protein Transition

# Supermarkets do not sufficiently encourage a more plant-based diet

Supermarkets are not encouraging customers enough to eat more plant-based. All supermarkets show awareness of the importance of the protein transition (the transition towards more plant-based proteins), but currently lack clear targets for increasing the sale of plant-based proteins at the expense of animal proteins.

The supermarkets' assortments facilitate an unsustainably large animal protein intake. Two out of three researched ready-to-eat meals contained animal-based proteins and only four per cent of these meals are fully plant-based. Almost three out of four pre-packaged meat products come in (extra) large portions (>100 grams). Additionally, about seven out of ten protein-rich promotions consist of meat or fish as the main ingredient.

Every supermarket has at least one intervention in place to shift food habits towards a more plant-based diet. Examples include Carrefour's Veggie Thursday, Colruyt's inspiration for vegetarian and vegan recipes, such as the vegetarian BBQ. However, none of the intervention measures have quantitative goals or are clearly described in policy documents.

Delhaize is the overall frontrunner in the protein transition, for example, by offering a relatively wide (but in absolute terms still limited) assortment of plant-based and vegetarian options.

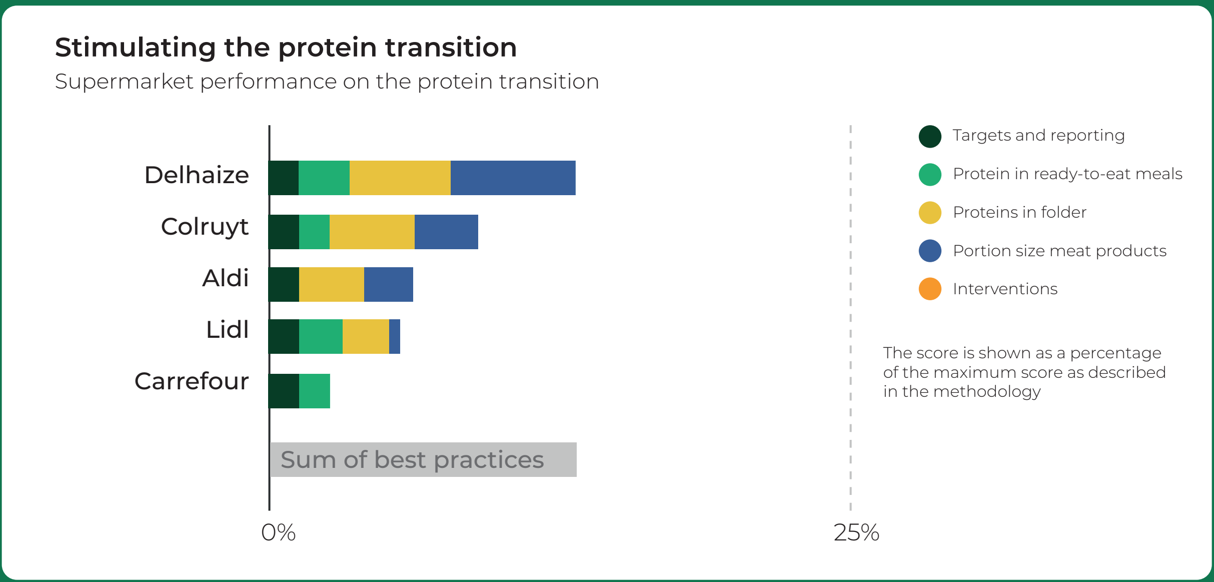



*Figure 12. Total performance of the supermarkt with regards to the topic 'protein transition'. The bar 'sum of best practices' shows the sum of current best practices found, and shows which progress supermarkets can easily make by learning from one another.* *See appendix 1 for details on the scoring →*

# Sustainable agriculture

# Sustainable food is not the norm, neither is transparency

Overall transparency and clear reporting on origin, transport and cultivation of supermarket products are missing. When reporting on origin the focus lies on Belgian origin. Lidl is the only supermarket that also reports on the origin of fruits and vegetables from other countries. There are, however, specific promising practices in transparency across Belgian supermarkets, such as programmes for fish certification, carbon farming and organic farming.

Furthermore, supermarkets do not guarantee that their entire assortment meets the minimum criteria of sustainability. Aldi and Lidl do not offer any sustainable certified option in about half of the researched product groups. Carrefour, Colruyt, and Delhaize offer at least one sustainable certified option in (almost) every researched product type.

**Efforts against deforestation are limited, transparency should increase**
Most efforts against deforestation for soy in animal feed, palm oil and cocoa, solely focus on private label products. Actions beyond the supermarkets' own supply chains, transparency on the origin and concrete action plans are mostly lacking. There are promising policies, such as supporting and purchasing from sustainable soy farmers, and committing to certifying all cocoa in the upcoming years (Beyond Chocolate).

Lidl is a clear frontrunner in sustainable agriculture efforts, outperforming other supermarkets on targets and reporting.

**Stimulating sustainable agriculture**
Supermarket performance on sustainable agriculture

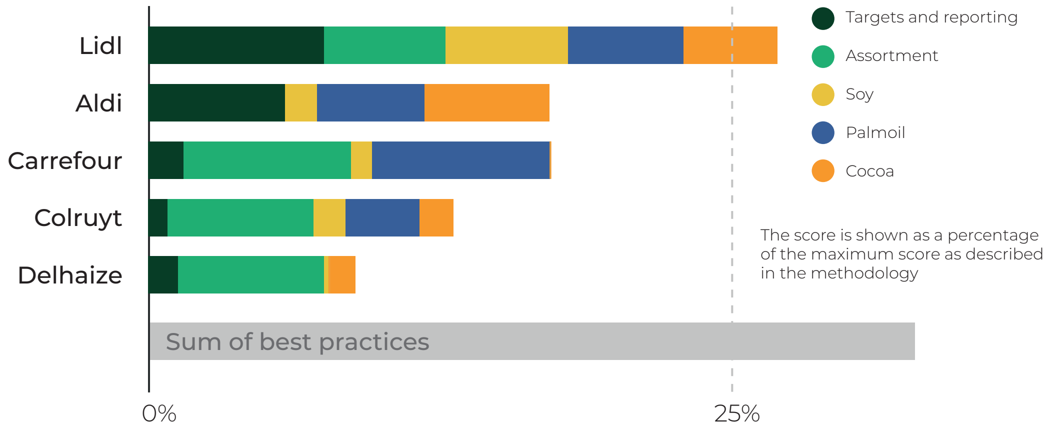



*Figure 24. Total performance of the supermarkt with regards to the topic 'sustainable agriculture'. The bar 'sum of best practices' shows the sum of current best practices found, and shows which progress supermarkets can easily make by learning from one another.* See appendix 1 for details on the scoring →

# Food waste

# Food waste is on the radar, but clear targets are missing

All supermarkets are beginning to show some awareness on food loss (before the supermarket/consumption stage) and/or food waste (from the supermarket stage onwards).
Although supermarkets are starting to take action, clear definitions, measurable targets, and reports on these targets are often missing or still in development. Third parties are not involved to make estimates of the total food loss and waste, or to assess the supermarkets' actions.

Delhaize is the only supermarket that has clear definitions of food waste and measurable targets with updated reports, making it the frontrunner in combating food waste.

Regarding donation and valorisation of food surplus, a number of good practices are being adopted. Initiatives include Aldi's action plan against food waste, Lidl's 'Good taste, zero waste', Carrefour's 'Zero waste box', and Colruyt's 'enVie soep'. Action instigated by the supermarkets mostly focus on consumers. When it comes to reduction efforts earlier in the supply chain, collaborations and initiatives remain minimal.


*Figure 29. Total performance of the supermarkt with regards to the topic 'food waste'. The bar 'sum of best practices' shows the sum of current best practices found, and shows which progress supermarkets can easily make by learning from one another.* See appendix 1 for details on the scoring →

Overall ranking

# Major differences between supermarkets on different topics

Within a general underachieving Belgian context, Lidl and Delhaize are considered the frontrunners. However, differences between the overall performances are negligible. Scores differ more significantly among supermarkets when we zoom in on the subtopics, namely protein transition, sustainable agriculture (incl. deforestation) and food waste. Supermarkets can thus take the first big step forward by learning from each other and implementing existing good practices.

The appendices to this report contain general and individual supermarket-specific recommendations. These recommendations do not serve as an end goal, but rather a starting point. It is an invitation towards supermarkets to enter into dialogue with each other, with civil society actors and with policy makers, to take the next step towards sustainable food environments together.

**Overall ranking Superlist Environment**

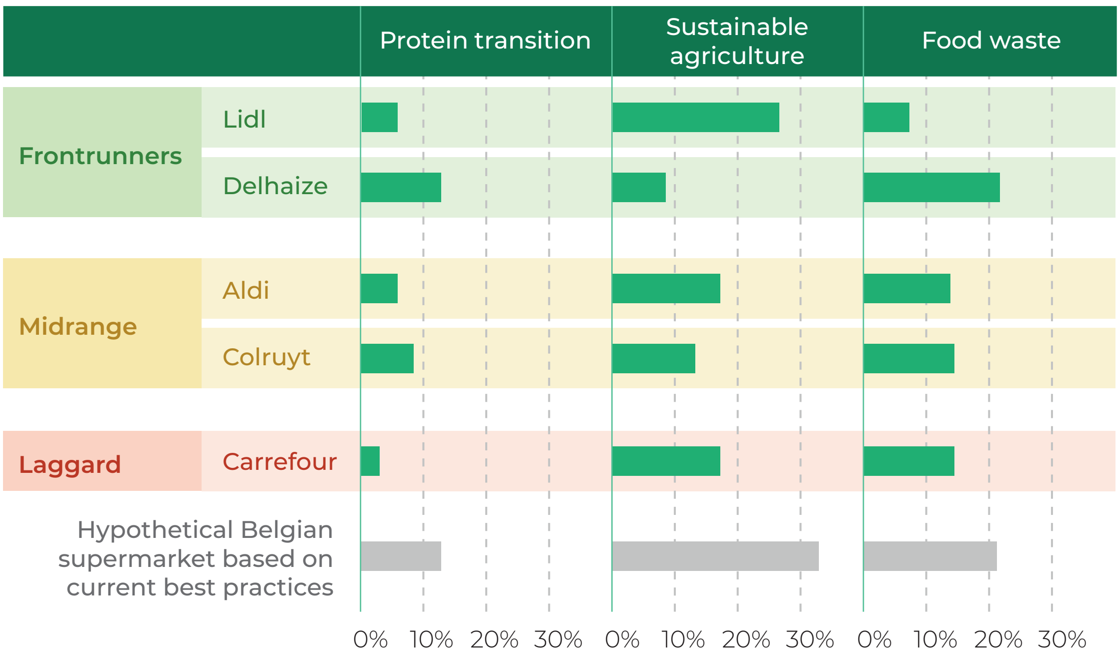



*Figure 30. The overall ranking of supermarkets, including the performance on the individual topics of protein transition, sustainable agriculture and food loss. The sum of best practices bar shows the sum of the current best practices found, showing what progress supermarkets can easily make by learning from each other.*

# Foreword

The urgency for the food sector to reduce its impact on nature and climate is abundantly clear. Considering supermarkets account for a large part the food provision in Belgium, they play a key role in the necessary changes that need to be made. This Superlist Environment maps the extent to which supermarkets contribute to a sustainable food system and food consumption pattern in Belgium. We see that supermarkets acknowledge their responsibilities, as shown by their commitment to climate agreements. However, intentions are not enough. This report provides ample evidence that supermarkets do not live up to their responsibility to translate awareness into suitable and sufficient actions.

This Superlist Environment was an exciting project for us, as it is the first complete Superlist outside the Netherlands. It is interesting for us to apply our think tank and research approach in different countries. We constantly update our research methodologies so they best suit our studies. In this case, we took the Belgium context into account and used local expertise to establish and execute a solid methodology.

As with all our projects, we were curious about the results of our research. We were particularly interested in how efforts with regard to the protein transition, sustainable agriculture and food waste differ between supermarkets in Belgium.
Notably, we see that supermarkets currently take a fragmented approach with regard to sustainability. We found minor differences between supermarkets in their overall performance, yet great differences between supermarkets within each research topic. This holds promise, vast improvements can take place if supermarkets are to emulate and combine the best practices in each focus area. We hope to see that supermarkets adopt this type of prioritisation in each of the areas. Considering their interconnected nature, this is a logical approach.

**Charlotte Linnebank**

Director Questionmark

**Questionmark**

# Word from the partners

The environmental impact of what and how we eat is enormous, and depends on several factors, choices and actors throughout the food chain. That said, most food purchases in Belgium are made in supermarkets, and no more than five supermarkets account for about 85% of the total market. These five supermarkets have a large impact on our ecological footprint, via their policy, their assortment and promotions, and their in-store tactics. Superlist addresses three major topics that are particularly relevant and in which supermarkets can make a big difference: protein transition, sustainable agriculture and food waste.

The research results may come across as a hard reality check, but at a second glance they offer pathways towards a resilient retail sector, and financial and societal advantages. Supermarkets operate in a competitive and dynamic environment. Tackling the researched issues will result in mid- and long-term benefits for both society and supermarkets. A coherent strategy that leads to real impact is therefore indispensable.

Our consortium consists of no less than seven partners. Each partner brings their own expertise to the table, and has their own tools and tactics to achieve change. Within this diversity, we have a clear goal in common: transitioning to a sustainable food system. We are therefore excited to be partners in the first Belgian Superlist research. We consider this report not to be an end point, but rather a starting point for structural and effective progress.

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# Introduction

Superlist is a multi-year study in several countries which provides insight into how supermarkets contribute to a healthier and more sustainable food system. Superlist Environment describes how supermarkets contribute to a sustainable food system and pattern.

## Topics

In this research, three topics are addressed:

- The **protein transition:** stimulating a more *plant-based food* pattern
- **Sustainable agriculture:** making *sustainable consumption* an easy choice, and contributing to the fight against *deforestation and land conversion* for soy, palm oil and cocoa
- Reducing **food waste**

These topics are explored in four research areas:

- **Targets** supermarkets have set themselves, and **reporting on the progress** they make with regards to these targets
- (Un)sustainable products in the **assortment**
- (Un)sustainable products in the **weekly promotions folders**
- The extent to which supermarkets make sustainable food the easy choice **in their stores** by nudging, and discourage the unsustainable choice.

The interventions supermarkets can implement for each topic and research area were determined. These interventions have been translated into measurable indicators. The precise methodology can be found in the document ‘Superlist Environment Belgium 2022 - Research methodology’ (Questionmark, 2022). The table below provides an overview of the topics, interventions and indicators examined.

| Research area | Intervention | Indicator | |
|---|---|---|---|
| **Protein transition** | | | |
| **Targets & reporting** | *The supermarket sets goals to increase the share in sales of plant-based proteins.* | *To what extent does the supermarket have a target for increasing the share of plant-based proteins in the total volume of protein sold?* | EN-1.1.1 → |
| **Assortment** | *The supermarket makes buying plant-based products easy.* | *To what extent do ready-to-eat-meals contain animal protein?* | EN-1.2.1 → |
| **Weekly promotions** | *The supermarket tempts customers into food routines in which plant-based proteins play a major role.* | *What proportion of protein-rich promotions consists of plant-based protein sources?* | EN-1.3.1 → |
| **Assortment** | | *Do the portion sizes of ready-to-eat meat products help to reduce meat consumption?* | EN-1.3.2 → |
| **In-store (nudging)** | | *What policies does the supermarket have for shifting food routines towards a more plant-based diet?* | EN-1.3.3 → |
| **Sustainable agriculture** | | | |
| **Targets & reporting** | *The supermarket provides insight into the most important sustainability aspects of supply chains.* | *To what extent does the supermarket report on the origin, transport and cultivation method of the products it sells?* | EN-2.1.1 → |
| **Assortment** | *The supermarket offers sustainable agriculture products.* | *To what extent does the supermarket's assortment meet relevant sustainable agriculture requirements?* | EN-2.2.1 → |
| **Targets & reporting** | *The supermarket takes action against deforestation and land use changes worldwide.* | *To what extent does the supermarket take action to stop deforestation linked to the use of soy in animal feed?* | EN-2.3.1 → |
| **Targets & reporting** | | *To what extent does the supermarket take action to stop deforestation linked to the use of palm oil in its products??* | EN-2.3.2 → |
| **Targets & reporting** | | *To what extent does the supermarket take action to stop deforestation linked to the use of cocoa in its products?* | EN-2.3.3 → |
| **Food Waste** | | | |
| **Targets & reporting** | *The supermarket takes action to reduce food waste.* | *Has the supermarket published a concrete and measurable action plan aimed at reducing both food loss in the supply chain and food waste at the consumer stage?* | EN-3.1.1 → |

*Figure 1. Overview of the topics, interventions and indicators examined.*

## Agreements

Over the last years, many agreements have been developed and guidelines have been drawn up for a sustainable food environment. This research ties in with these agreements as much as possible. Below is an overview of important agreements and objectives in Belgium per researched topic.

**Existing agreements and objectives related to the topic protein shift**

→ **Federal Plan for Sustainable Development (ICDO, 2021)**
This plan aims to reform the Belgian economy, including by facilitating sustainable consumption and kick-starting the transition of our food system.

→ **De Vlaamse Eiwitstrategie 2021-2030 (Vlaamse overheid, 2021b)**
'Flanders' Protein Strategy 2021-2030' sets out ways for Flanders to produce more and more diverse plant-based proteins for daily consumption, and to make animal feed more sustainable. It proposes six strategies, including:

- More plant-based proteins and more new proteins: Flemish agriculture must produce more plant-based proteins and become a main actor with regard to knowledge, production and processing of new proteins, such as insects, algae and seaweed.
- A more sustainable protein consumption. Through education and a dietary adjustment in the context of health, rather than sustainability, it hopes to change consumers' behaviour. Its vision is to shift the ratio of animal to plant productsand and proteins, avoid overconsumption and waste of proteins, diversify the range of proteins, and promote the consumption of local proteins.

→ **Green Deal - Eiwitshift op ons bord (Vlaamse overheid, 2021b)**
The aim is to transform people's consumption and eating habits, change the kind of proteins they consume and reduce their overall protein intake. Today, Flanders' ratio is about 60/40 (animal/plant protein sources). The goal is to reverse that ratio to 40/60 animal/plant proteins by 2030. Various actors in the wider food system play an important role in consumers' consumption patterns. They shape people's routines and steer their choices via communication and promotions. All main Belgian supermarkets have signed the Green Deal programme.

→ **Beleidsnota Landbouw en Visserij 2019-2024 (Vlaamse overheid, 2019a)**
The Government of Flanders' 'Agriculture and Fisheries Policy 2019-2024' refers to a shift towards a more sustainable diet, including a more balanced consumption of protein: "As part of this agricultural policy, we are developing a protein policy that focuses on a broad and sustainable fulfilment of protein needs in Flanders, both for human food and feed, in the framework of healthy and qualitative food and feed."

### Existing agreements and objectives related to the topic sustainable agriculture


- **European Green Deal with the EU Biodiversity Strategy 2030 and Farm to Fork Strategy (EC, 2020; EU, 2020).** These strategies set several targets for 2030, including (a) turning at least 30% of EU land and 30% of EU seas into effectively managed and coherently protected areas; (b) restoring degraded ecosystems and stopping any further damage to nature; (c) reducing the use and risk of pesticides by at least 50%; (d) managing 25% of agricultural land through organic farming and promoting the update of agro-ecological practices; and (e) establishing biodiversity-rich landscape features on at least 10% of farmland.

- **EU Code of Conduct on Responsible Food Business and Marketing Practices (EC, 2021).** This Code (which mirrors one of the first deliverables of the Farm to Fork Strategy) sets out seven objectives, including actions that actors (including supermarkets) can voluntarily commit to, to improve and communicate their sustainability performance. Delhaize, Carrefour and Colruyt have all pledged to follow this Code of Conduct. The Code includes targets such as a food environment that makes it easier to choose healthy and sustainable diets. It defines actions like (a) promoting more sustainably-produced food products (e.g. organic food, sustainable fish) and increasing consumers' awareness of healthy, balanced and sustainable diets; (b) reviewing and/or offering a range of appropriate portion and serving sizes aimed at sustainable food consumption; (c) voluntarily providing consumers with transparent product information; (d) and identifying and contributing to appropriate solutions and strategies to prevent deforestation and to promote conversion-free food supply chains.

- **Walloon Plan Bio 2030 (SPW Agriculture, 2021).** The Walloon Government has set several objectives to stimulate organic production, increasing its share of overall production to 30% by 2030.

- **Strategic Plan Organic Agriculture 2018-2022 (Vlaamse overheid, 2018).** The Government of Flanders aims for a sustainable qualitative and quantitative growth of organic production.

- **Vlaamse Eiwitstrategie 2021-2030 (Vlaamse overheid, 2021c).** Flanders' Protein Strategy states that all soy used for animal feed should comply with FEFAC Soy Sourcing Guidelines and its criteria on deforestation and ecosystem conversion by 2030. One of the criteria is that no soy should be produced in converted natural ecosystems after a certain cut-off date.

→ **Beyond Chocolate (IDH, 2022)**
All signatories of Beyond Chocolate commit to working together to solve a series of challenges in the field of sustainable chocolate (IDH, 2020). This means that all chocolate that is manufactured or traded in Belgium must meet a relevant certification standard or be manufactured using cocoa products from the company's own sustainability programmes by the end of 2025. Agreements between governments and private partners that fall under the Cocoa & Forests Initiative must also be fully respected by that same deadline. The deforestation resulting from cocoa production for the Belgian chocolate industry must end by 2030. By then, all cocoa producers must be able to earn a viable income (or more).

**Existing agreements and objectives related to the topic food waste**

→ **European Farm to Fork Strategy (EU, 2020)**
Halving per-capita food waste at the retail and consumer levels by 2030. The Commission will propose legally binding targets to reduce food waste across the EU by 2023.

→ **Ketenroadmap 2015-2020 (Vlaamse Overheid, 2014)**
Formulates the objective to reduce food loss by 30% between 2015 and 2025.

→ **Vizier 2030 (Government of Flanders, 2019)**
Objective 33 aims to reduce food loss in Flanders by 30% by 2030.

→ **Federal Plan for Sustainable Development ('Federaal Plan Duurzame Ontwikkeling', 2021)**
Acknowledges food as a prerequisite for sustainable development in Belgium. "Raising awareness amongst citizens of good product use and maintenance practices, sustainable consumption, reuse, repair and recycling is envisaged, which would ultimately reduce food waste."

→ **Walloon Regal plan, Lutte contre les pertes et gaspillages alimentaires (Gouvernement wallon, 2018)**
Includes 17 actions aimed at reducing loss and waste at all levels of the food chain by 30% between 2015 and 2025.

→ **Flemish action plan 'Voedselverlies en biomassa - (rest)stromen' (Vlaamse overheid, 2021a)**
Reduce food loss by 30% along the entire chain, reprocessing any loss of food or valorising it better compared to 2015. Businesses (catering, hospitality, retail) are encouraged to decrease their residual waste by 20% by 2025.

## Research method

Superlist focuses on the five largest supermarket chains in Belgium in terms of market share: Carrefour (17.9%), Delhaize (22.8%), Colruyt (25.7%), Aldi (10.6%) and Lidl (7.4%) (Gondola, 2021). Together, they have a total market share of 84.4%.

Supermarkets that had a web store had their online assortment analysed, whilst supermarkets without one had their product information gathered in-store.

More information about how regional differences were handled can be found in the document 'Superlist Environment Belgium 2022 - Research methodology' (Questionmark, 2022).

The methodology for this study was published on June 15, 2022, after consultation with, among others, the supermarkets, the Scientific Council, Civil Society Partners and several policymakers. All data was collected between June 16 and August 15 2022. An extensive account of the research can be found in appendix 4.

## Reading guide

The goal of this report is to increase the knowledge of supermarkets and to let them inspire each other to play an increasingly important role in a healthy and sustainable food system. Therefore, supermarkets that perform well on a specific indicator within the survey have been marked with the icon **this counts** in the margin.

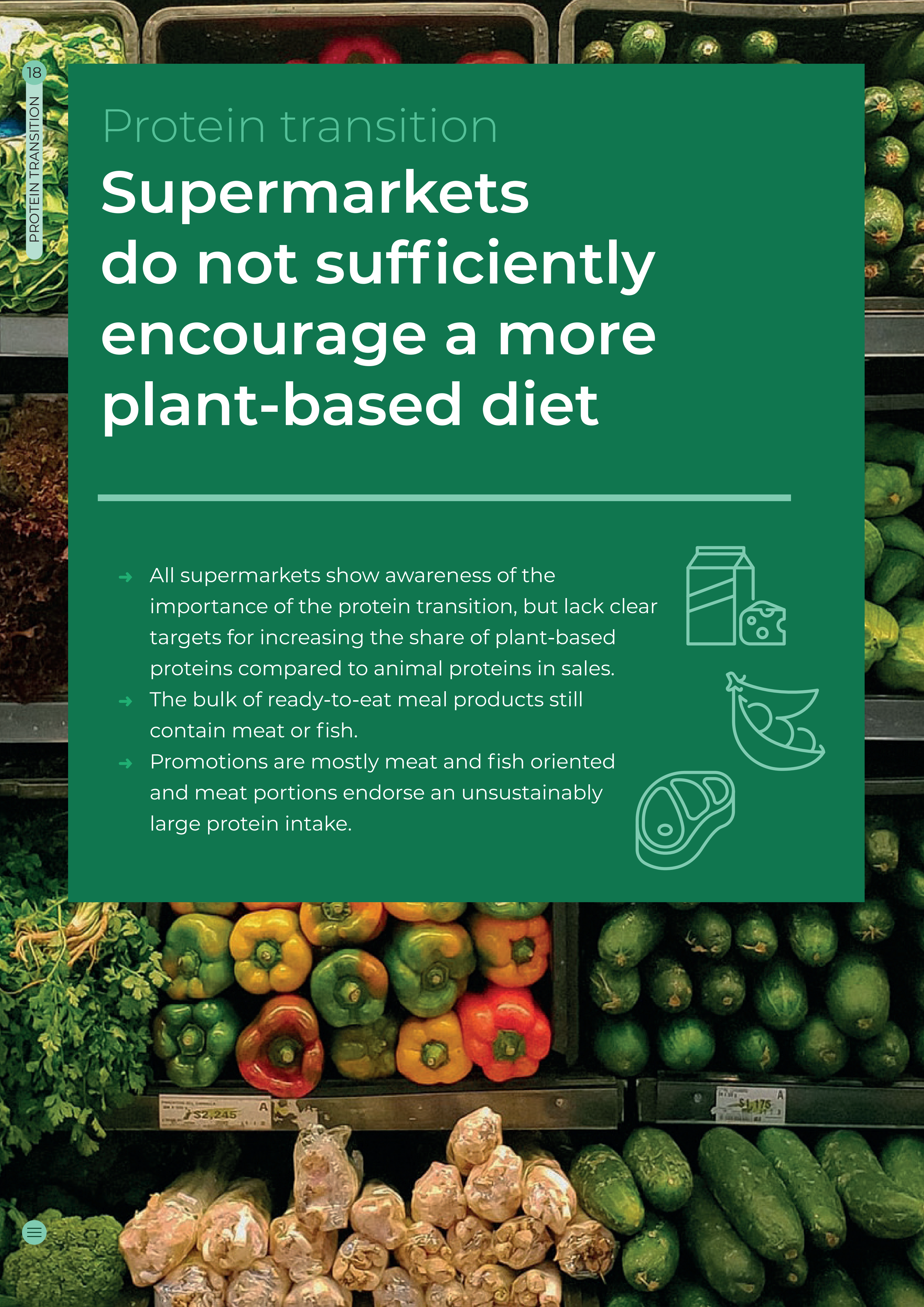
this counts

Not all observed measures are progressive enough to count in this research, but even small steps in the right direction are worth noting. These initiatives have been marked with the icon **good step**.

good step

## Abbreviations / glossary

| | |
|---|---|
| Bio / organic | European organic certification |
| Reports | Published information available via the website of the supermarket or parent company/group. This also includes year reports and other publications. |



Protein transition

# Supermarkets do not sufficiently encourage a more plant-based diet

- All supermarkets show awareness of the importance of the protein transition, but lack clear targets for increasing the share of plant-based proteins compared to animal proteins in sales.
- The bulk of ready-to-eat meal products still contain meat or fish.
- Promotions are mostly meat and fish oriented and meat portions endorse an unsustainably large protein intake.

The production of animal proteins has a large environmental footprint. Farmland is used to produce animal feed, at the expense of agricultural land for human food or at the expense of vulnerable nature and (tropical primaeval) forests. Intensive livestock also has a negative impact on our water, soil and air quality. In Belgium, we still consume twice as much as the recommended amount of animal protein (Riera, Antier, and Baret, 2019). Animal proteins currently make up about 62 per cent of protein in the average Belgian diet (Our World in Data, 2017).

In Belgium, agreements and objectives have been formulated to achieve the 'protein transition', a shift in consumers' food patterns towards more sustainably produced animal proteins and/or plant-based protein. The 'Green Deal - protein transition On Our Plate' aims to transform people's consumption and eating habits (Vlaamse overheid, 2021b). The last food consumption survey showed that Flanders' ratio is about 60/40 (animal/plant protein sources) (WIV ISP, 2016). The ambition of the Green Deal is to reverse that ratio to 40/60 animal/plant proteins by 2030. All main Belgian supermarkets have signed the voluntary Green Deal programme.

## What has been examined?

Supermarkets were examined on the following four criteria:

- To what extent does the supermarket have a **target** for increasing the share of plant-based proteins in the total volume of products sold?
- What proportion of protein-rich promotions in the **promotion folders** consists of plant-based protein sources?
- To what extent do **ready-to-eat products** contain animal protein?
- Do the **portion sizes** of ready-to-eat meat products help to reduce meat consumption?

In addition, **supermarkets' interventions** to encourage a more plant-based diet were also investigated. There are not many scientifically substantiated measures yet that supermarkets can take to this end. Therefore, supermarkets could also propose their own measures based on their knowledge and experience for this study. Those measures had to meet a number of basic criteria; for example, measures have to be permanent (so no discount campaigns) and cannot be considered common practice.

More information about the research method can be found in appendix 4. The precise criteria can be found in the document 'Superlist Environment Belgium 2022 - Research methodology' (Questionmark, 2022). All measures that comply with these criteria, will add to the supermarket's ranking.

# Clear targets to reduce animal-based protein are still missing

## EN-1.1.1 To what extent does the supermarket have a target for increasing the share of plant based proteins in the total volume of protein sold?

- All supermarkets show awareness on the importance of the protein transition.
- However, clear targets for increasing the share of plant-based proteins compared to animal proteins in sales are currently lacking.
- Furthermore, none of the supermarkets give insight into sales figures relevant to the protein transition.

Formulating clear objectives to stimulate plant-based protein is important for several reasons. A clear target shows that the supermarket endorses the importance of plant-based food at a high level. Without a target, it is not clear whether the supermarket simply follows developments in the retail sector or whether it also actually wants to accelerate these developments. Setting a clear target and reporting[2] on the progress of this target also holds a supermarket accountable.

For this indicator, the publicly available policy documents of supermarkets were checked and the extent in which a supermarket implements policy regarding the protein transition was researched.

this counts

**All of the supermarkets** show awareness on the topic of the protein transition, for instance by participating in the Green Deal protein transition (Aldi België, 2022c; Carrefour Group, 2022a; Lidl België, 2022d; Delhaize België, 2022f; Colruyt, 2022b). All supermarkets also mention that they are expanding their plant-based product range (Aldi België, 2022c; Carrefour Group, 2022a; Colruyt, 2022a; Delhaize België, 2022f; Lidl België, 2022d).

However, none of the supermarkets show more awareness on this topic. Insights in the ratio of animal to plant-based sales are never given. Clear targets for shifting the ratio of animal to plant-based protein in the total volume of products sold are missing for every supermarket. Since no specific policies are currently in place, the switch to a more plant-based diet still lies entirely with the customer.

2 'Reporting' refers to published information available via the website of the supermarket or parent company/group. This also includes year reports and other publications. (see glossary)

good step

However, **Lidl** mentions that they would like to have a clear definition of plant-based and animal proteins developed by 2025, and will use this definition to monitor and evaluate the shift towards the 40/60 (animal/plant-based) goal of the Green Deal (Lidl België & Luxemburg, 2022).

## What do supermarkets say about the protein transition?

*“We nemen deel aan de ‘Green Deal Eiwitshift op ons bord’ van de Vlaamse overheid om de verhouding tussen dierlijke en plantaardige eiwitten in de Vlaamse consumptie te verbeteren.”*

Aldi België, 2022c

*“Carrefour is committed to developing vegetarian product ranges with a view to offering an alternative to the consumption of animal proteins.”*

Carrefour Group, 2022a

*“We willen de drempel om voor plantaardige producten te kiezen verlagen, door onze klanten te inspireren en door plantaardige producten beter zichtbaar te maken.”*

Colruyt, 2022a

*“Delhaize heeft de ambitie om dat [van zuivel- en vleesvervangers] assortiment tegen 2025 te verdubbelen.”*

Delhaize België, 2022f

*“Tegen 2025 wil Lidl België een duidelijke definitie formuleren van plantaardige en dierlijke proteïnen. Met deze definitie willen we nagaan welke producten we tot plantaardige en dierlijke eiwitbronnen rekenen. Deze informatie zorgt er voor dat we de transitie naar 60/40 plantaardige/dierlijke eiwitten kunnen monitoren en evalueren.”*

Lidl België & Luxemburg, 2022

Although it is promising that supermarkets show awareness and formulate actions to promote plant-based alternatives, they have to formulate and report on targets on the share of sales in animal/plant-based proteins, as Lidl says it will do. Only then can they truly measure the effectiveness of their efforts in shifting food patterns away from animal-based proteins towards plant-based proteins.

# Meat and fish are still the norm in ready-to-eat meals

## EN-1.2.1 To what extent do ready meals contain animal protein?

- In most supermarkets, the bulk of ready-to-eat meals seems to contain meat or fish. Two out of three researched products contain animal-based proteins and only four per cent are fully plant-based.
- Delhaize is the frontrunner, by offering a relatively wide assortment of plant-based and vegetarian options.

In ready-to-eat meals like pizzas, soups or pasta dishes, animal proteins like meat or dairy are common but often unnecessary. Avoiding animal-based proteins in these product groups does not require a rigorous change in food choices and makes eating (more) plant-based an easy choice.

Six prevalent ready-to-eat meal types[3] were researched on their protein-sources. Three different protein sources were distinguished according to their contribution to the protein transition, namely meat and fish, dairy and eggs, and plant-based proteins[4].

**Most ready-to-eat meals contain animal ingredients**

Percentage of ready-to-eat meals sorted by the protein source.

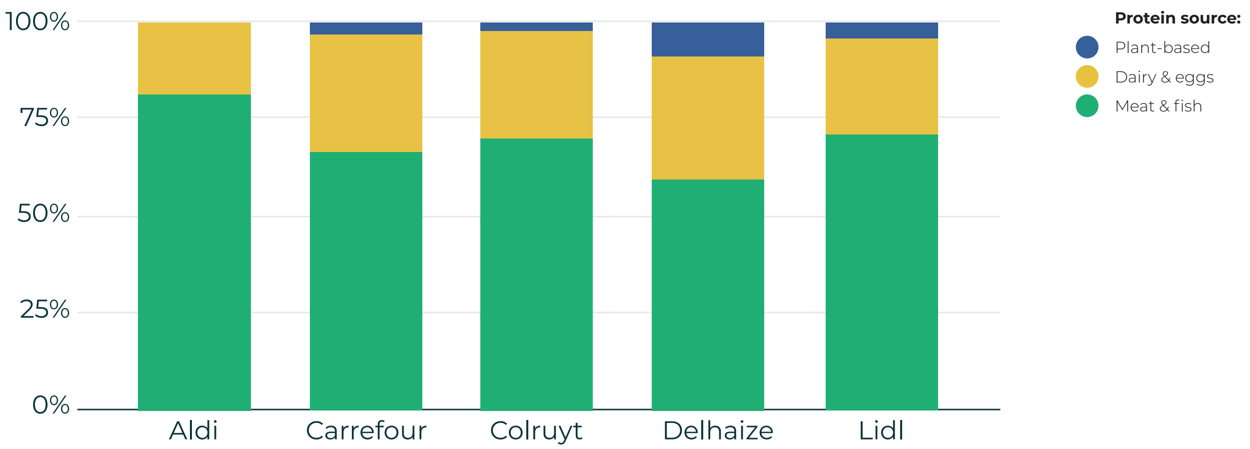



*Figure 2. Percentage of ready-to-eat meals sorted by the protein source. A distinction is made between plant-based, dairy & eggs, meat & fish*

3 Belgian meals, meal salads, pasta, pizza, quiches and ready-made soups. For an explanation of what has been included and what not, see appendix 1.

4 For this indicator, a selection of ready-to-eat meals was researched, of which animal protein content could be reduced without rigorous change. In doing so, the aim was to make a meaningful selection.

## Plant-based option often not available

Availability of ready-to-eat meals according to protein sources

| | ALDI | Carrefour | colruyt | DELHAIZE | LIDL |
|---|---|---|---|---|---|
| Belgian meals | 0 | 0 | 0 | 0 | 0 |
| Meal salads | 0 | 0 | 5 | 0 | 10 |
| Pasta | 5 | 10 | 5 | 10 | 5 |
| Pizza | 5 | 10 | 10 | 10 | 10 |
| Quiche | 5 | 5 | 5 | 5 | – |
| Ready-made soups | 0 | 10 | 10 | 10 | 5 |
| *Sample size* | *81* | *218* | *191* | *277* | *73* |

0 = All options contain meat, fish or shellfish

5 = At least one option without meat, fish or shellfish, and with dairy or eggs

10 = At least one option fully plant-based

*Figure 3. Availability of ready-to-eat meals according to the protein sources. A distinction is made between plant-based, dairy & eggs, meat & fish*

In all supermarkets, most researched ready-to-eat meals contain meat or fish (67 per centon average) and only four per cent is currently fully plant-based. Plant-based options are mostly available for pastas, pizzas and ready-made soups.

Most of the supermarkets do not offer a fully plant-based alternative for Belgian meals, meal salads[5] and quiches. Belgian meals, of which 146 different products were investigated, always contain meat or fish[6].

this counts

**Carrefour** and **Delhaize** offer fully plant-based options in three product categories, namely pastas, pizzas, and ready-made soups. About half of their soups and pizzas do not contain meat or fish. Approximately 20 per cent of Delhaize's soup assortment is fully plant-based.

Colruyt stays behind in their pasta meal assortment, with no plant-based and only seven vegetarian options out of 58 dishes.

this counts

Conversely, five out of twelve meal salads in **Colruyt's** assortment are vegetarian, which is more than any other supermarket.

Lidl does not offer fully plant-based soups. As for pastas and pizzas, their assortment offers one vegan option and a couple of vegetarian options[7].

Aldi did not have any fully plant-based option throughout the researched categories of its ready-to-eat assortment[8], while most other supermarkets offer plant-based pastas, pizzas and soups. Furthermore, Aldi is the only supermarket that does not offer a vegetarian ready-made soup, despite offering thirteen different types of soup. Even their vegetable soups contain animal proteins, such as chicken meat or chicken fat.

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5 Besides Lidl, some supermarkets did also offer fully plant-based salads, but in order to be defined as a 'meal' salad, the product had to weigh at least 350 gr, which was not the case for their plant-based salads.

6 In the Netherlands almost every supermarket offers a fully plant-based option for Dutch ready-to-eat meals (Questionmark 2021a). In fact, there are quite many vegetarian and even vegan options across all product categories in the Netherlands.

7 Since Lidl does not sell quiches in Belgium, they are awarded the average points on the other meal types for this product category. This way, they are not (dis)advantaged in the general scoring model. For this research, we visited Lidl Mariakerke. It is possible that quiches are available in other branches of Lidl.

8 Aldi does offer vegetarian and plant-based products, but these were always in the portion size of a side-dish, e.g. meal salads with a portion size smaller than 350 grams. For this research we visited Aldi Herenthout. It is possible that other branches have a slight different product availability.

# Promotions stimulate meat consumption

## EN-1.3.1 What proportion of protein-rich promotions consists of plant-based protein sources?

- About seven out of ten protein-rich promotions consist of meat or fish as the main ingredient.
- Less than one in ten protein-rich promotions has a plant-based main ingredient.
- Delhaize and Colruyt take the lead with a share of approximately 35 per cent plant-based or vegetarian protein promotions in their folders.

Advertising meat directly encourages customers to buy meat and reinforces the idea that meat should be part of a daily food pattern (Bogueva and Phau, 2016). For this indicator, it was investigated whether a supermarket helps to change that image by including more plant-based proteins and fewer animal proteins in its weekly promotions.

During the research period, (bi)weekly promotion folders[9] were scanned to review promotions of products with a protein-rich main ingredient (such as meat, fish, eggs, cheese, nuts, seeds, vegetarian alternatives for meat etc.). These protein-rich products were categorised in three groups: meat and fish, non-liquid dairy[10] and eggs, and plant-based[11].

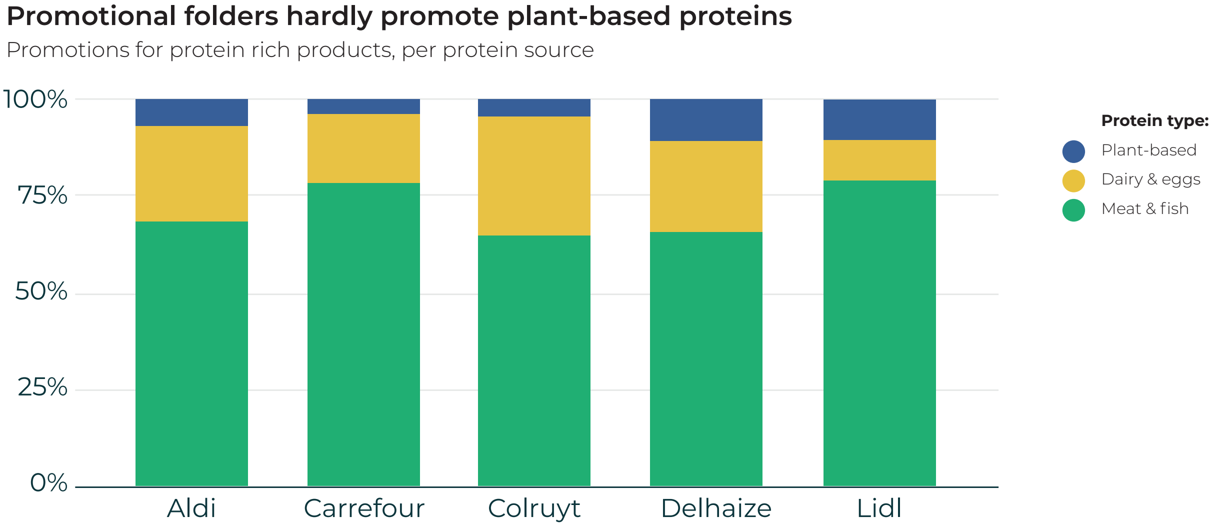



*Figure 4. Percentage of promotions of protein rich products in the (bi)weekly folder, sorted on the protein source in the main ingredient. A distinction is made between plant-based, dairy & eggs, meat & fish*

9 See appendix 3 for more information on which promotional folders were included in the analysis.

10 Liquid dairy (milk, yoghurt) is not included in this indicator (even though it should not be encouraged as a source of protein from an environmental point of view), because milk is an important source of calcium and vitamins in the Belgian diet (Gezond Leven, 2022a).

11 For this indicator, products were categorised, based on the composition of the main ingredient. For example, a vegetarian meal including egg-based ingredients but with a fully plant-based main ingredient, will be categorised as plant-based and not egg & dairy.

Looking at protein-rich products, the researched (bi)weekly promotional folders largely promote products with an animal based main ingredient. On average, more than 70 per cent of the promotions contain meat or fish, and only seven per cent of all protein-rich promotions have a plant-based main ingredient. Of the researched promotional folders, 7 out of 36 did not include any promotion for plant-based protein-rich products. The share of dairy or egg-based promotions differs across the supermarkets.

this counts

In the promotion folders of Delhaize and Colruyt, about 65 per cent of the protein-rich promotions are meat or fish based. This is much lower than Lidl and Carrefour where these make up approximately 78 per cent of the protein-rich promotions. Dedicating approximately 35 per cent for dairy/egg- or plant-based products, **Delhaize** and **Colruyt** can therefore be considered the frontrunners, albeit in a Belgian (and therefore, mostly underachieving) context[12].

At Aldi, about 70 per cent of the protein-rich promotions have a meat- or fish-based main ingredient, with six per cent of the promotions containing solely a plant-based main ingredient.

good step

With 79 per cent, Lidl has one of the highest shares of protein-rich promotions with a meat or fish based main ingredient. However, **Lidl**, together with **Delhaize**, does have the largest share of plant-based promotions (almost eleven per cent).

Carrefour is the laggard on this topic. Like Lidl, four out five protein-rich promotions in Carrefour's promotion folders have a meat- or fish-based main ingredient. They also have the lowest share of plant-based protein-rich promotions (4 per cent).

12 In the Netherlands, about seventeen per cent of all protein-rich promotions were plant-based. Even when Ekoplaza, an organic supermarket, is excluded, the average per centage is 16 per cent, which is still a lot higher than the Belgian average of seven per cent. Looking at Lidl and Aldi, two supermarkets that operate both in the Netherlands and in Belgium, their respective percentages of plant-based protein-rich promotions are 15 and 21 per cent in Dutch supermarkets, and only 10 and 6 per cent in Belgian stores.

# Ready-to-eat meat mostly comes in (extra) large portions

## EN-1.3.2 Do the portion sizes of ready-to-eat meat products help to reduce meat consumption?

- Almost three out of four pre-packaged meat products come in (extra) large portions (>100 grams).
- Only about one in eight meat products weighs 80 grams or less.
- Schnitzels and sausages are sometimes even offered in portions of more than 150 grams per piece.

Meat can still be part of a healthy and environmentally friendly diet, when eaten less frequently and in smaller portions (Gezond Leven, 2022b). However, portion sizes create an implicit standard (Steenhuis, Leeuwis, and Vermeer, 2010). Thus, consumers view the portion sizes of meat offered in supermarkets and restaurants as an indication of the appropriate 'normal' portion size (Be4Life, 2018). Supermarkets can contribute to achieving the standard for a healthy and sustainable diet in 2030 by offering meat in increasingly smaller portions. This intervention can help change what is seen as a 'normal' portion of meat, without requiring rigorous change of consumers.

**Large portions of meat are the standard**

Portion size in ready-to-eat meat products

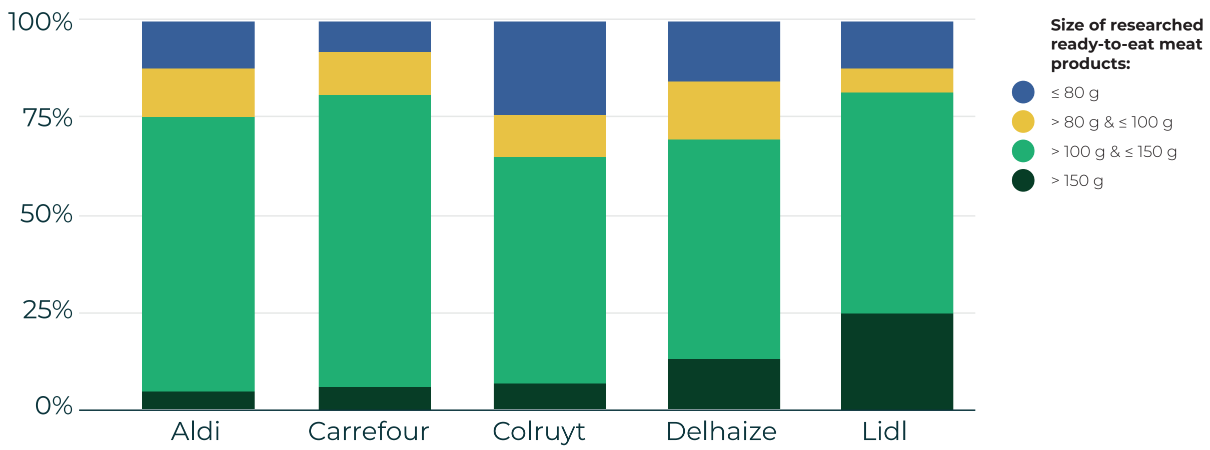



*Figure 5. Percentage of portion sizes in ready-to-eat meat products. A distinction is made on the following cut-off points: 80 grams, 100 grams and 150 grams.*

The portion sizes of three different pre-packaged meat product groups were examined in each supermarket: burgers (e.g. beef burgers, hamburgers, chicken burgers, etc.), sausages, and schnitzels (including filled schnitzels such as cordon bleu).

In all supermarkets, portions of more than 100 grams make up the lion share of the researched meat products. Only about 15 percent of the available meat products come in portions of 80 grams or less. Compared to burgers and schnitzels, sausages are more frequently offered in small (=<80 grams), but also in extra large (>150 grams) portions. Schnitzels are more frequently offered in a medium portion size (>80 and =< 100 grams) than burgers and sausages, but all product types are mostly offered in (extra) large portions (more than 100 grams)[13].

**this counts**

Within this context, **Delhaize** and **Colruyt** can be seen as the frontrunners. Colruyt has an extensive range of small portion products (80 grams or less), which make up about 25 percent of the researched products. Delhaize has less small portion products than Colruyt and more extra large products, but Delhaize is the only supermarket offering only medium and small sized schnitzels. Aldi has the lowest share of extra large meat products and an average number of small to medium meat sized products. Aldi therefore has an average performance on this indicator, albeit in a Belgian underachieving context.

It is noticeable that Carrefour has the lowest number of meat products in a small portion size, and Lidl has the highest number of extra large ready-to-eat meat products in their assortment. At Lidl, 4 out of 15 sausages and 4 out of 13 schnitzels come in an extra large portion size (more than 150 grams). Lidl and Carrefour also have the smallest combined share of meat products in small and medium portion size (100 grams or less), making them the laggards for this topic.

13 These results differ significantly from the outcomes in the Netherlands, where no more than half of all researched meat types are being sold in packages of more than 100 grams, as opposed to more than 70 percent in Belgium. This is not to say that the Dutch outcomes were positive; Dutch meat portions are also not in line with a sustainable meat consumption pattern.

# Interventions towards the protein transition are marginal, but show promise

## EN-1.3.3 What policies does the supermarket have for shifting food routines towards a more plant-based diet?

- All supermarkets show awareness of the protein shift by having at least one intervention in place to shift eating habits towards a plant-based diet, but none of the interventions have quantitative goals or are clear enough to qualify.
- There were no interventions found that substantially stimulate a more plant-based diet.

Interventions encouraging people to eat more plant-based diets rather than animal products were researched both in physical stores and online. Publicly available documents such as policies and annual reports were primarily were assessed. In order to be considered a substantial intervention in this research, an action has to meet five minimum conditions[14]. The intervention:

- has to be aimed at reducing the share of animal proteins in eating habits.
- has to go beyond legal requirements and common practice.
- has to have a clearly described scope.
- has to be aimed at customers not actively looking for a more plant-based diet.
- has to be in effect for more than a year.

In these publicly available policies, none of the interventions described met all five minimum conditions. Every supermarket did have at least one measure in place to shift eating habits to a more plant-based diet. Below, a non-exhaustive selection of interesting interventions are highlighted.

good step

**Carrefour** shows promise with its Veggie Thursday promotion in which certain plant-based products are discounted at twenty per cent. This is currently a limited-time offer and it is unclear whether or not it applies to all Belgian Carrefour stores (Carrefour België, 2022b).

14 Five minimum conditions were formulated for an intervention to be able to have a substantial impact. Nevertheless, interventions that do not meet all five criteria, can still be valuable. Small-scale experiments and interventions can evolve to become substantial interventions in the future. Actions that did not deliver the expected result, can form a starting point for developing a new approach. Superlist encourages supermarkets to keep on experimenting, to involve external experts in designing these interventions, and to integrate these interventions in permanent policies.

good step

**Colruyt** offers vegetarian barbecue food such as veggie hot dogs with veganaise and pickled radishes or brochettes with halloumi. This is an interesting offer, as barbecue targets an occasion that is mostly associated with animal proteins, i.e. meat and fish (Colruyt, 2022j).

good step

**Aldi** and **Lidl** provide a list of vegetarian recipes (Lidl België, 2022a; Aldi België, 2022e), while **Carrefour** and **Colruyt** and **Delhaize** offer both vegetarian and vegan recipes (Carrefour België, 2022c; Colruyt, 2022g; Delhaize België, 2022c). These interventions are mostly available online and mainly target customers actively looking for vegetarian and vegan recipes.

### Spotted on-site[15] : protein transition


*Figure 6. Carrefour's Veggie Thursday offering a twenty per cent discount on a range of vegetarian products. A promising practice, albeit currently limited in scope.*

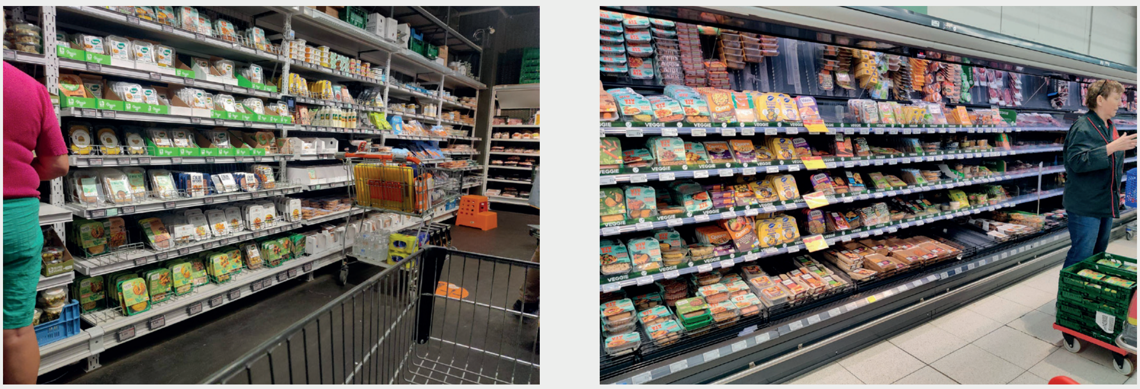


*Figure 7. Labelling vegan and vegetarian alternatives (Colruyt, Carrefour). Currently, there is no scientific consensus on the effect of vegan labels on the total market.*

15 During the data collection period, five different shops of each supermarket chain were visited (two in Flanders, two in Wallonia and one in Brussels), both in cities and rural areas. Apart from checking policy claims, the goal of these visits was to look for point-of-sale materials, labelling, rewards and other interventions linked to environment-friendly food. In a 'Spotted on-site' box, a non-exhaustive selection of the observations made, are presented.

**Spotted on-site: protein transition**


*Figure 8. Placing plant-based and animal-based variants of the same product next to each other (Colruyt, Carrefour, Lidl, Delhaize).*

*Figure 9. Offering a wide range of plant-based meals (Delhaize).*


*Figure 10. Recipe booklets with vegetarian alternatives (Carrefour).*

## Spotted on-site: protein transition


*Figure 11. Vegetarian and vegan alternatives placed in a single location, including point-of-sale materials (Delhaize, Lidl, Aldi).*

## How does this count in the ranking?

Regarding the protein transition, Delhaize performs best compared to the other supermarkets, followed by Colruyt, then Aldi and Lidl. Carrefour makes the least effort on the protein transition.

### Stimulating the protein transition

Supermarket performance on the protein transition

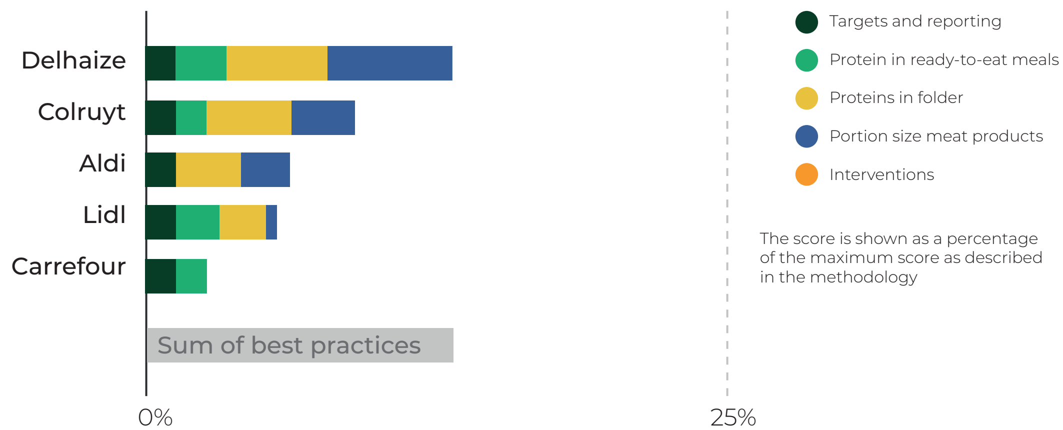



*Figure 12. Total performance of the supermarkt with regards to the topic 'protein transition'. The bar 'sum of best practices' shows the sum of current best practices found, and shows which progress supermarkets can easily make by learning from one another. See appendix 1 for details on the scoring →*

Sustainable agriculture

# Sustainable food is not the norm, neither is transparency

- Instead of guaranteeing that the entire assortment meets a minimum of sustainability requirements, supermarkets place the responsibility for finding and choosing sustainable products upon the customer.
- Overall transparency and clear reporting on origin, transport and cultivation are missing, apart from specific noteworthy cases such as certified fish.

Today's common agricultural methods have devastating consequences on valuable nature and climate around the world. European, national and regional agreements strive to achieve more sustainable agriculture. The EU Biodiversity Strategy 2030 and Farm to Fork Strategy (EU, 2020; EC, 2020) set several targets for 2030, including turning at least 30 per cent of EU land and 30 per cent of EU seas into effectively managed and coherently protected areas; and restoring degraded ecosystems and stopping any further damage to nature. *The EU Code of Conduct on Responsible Food Business and Marketing Practices* sets out seven objectives. It includes actions that actors (including supermarkets) can voluntarily commit to in order to improve and communicate their sustainability performance (EC, 2021). Delhaize, Carrefour and Colruyt have committed to this conduct. The Code includes targets such as a food environment that makes it easier for customers to choose healthy and sustainable diets. An exhaustive and more detailed description of these agreements can be found in Superlist's methodology (Questionmark, 2022).

## What has been investigated?

Supermarkets were examined on the following two criteria:

- To what extent does the supermarket **report** on the origin, transport, and cultivation method of the products it sells?
- To what extent does the supermarket's **assortment** meet relevant **sustainable agriculture** requirements?

More information about the research method can be found in appendix 4. The precise criteria can be found in the document 'Superlist Environment Belgium 2022 - Research methodology' (Questionmark, 2022). All measures that comply with these criteria, will add to the supermarket's ranking.

# Supermarkets are hardly transparent on origin, transport and cultivation method

## EN-2.1.1 To what extent does the supermarket report on the origin, transport and cultivation method of the products it sells?

- Supermarkets are hardly transparent on the origin, transport and cultivation methods of the products they sell.
- When reporting on origin, supermarkets mainly focus on products from Belgium. However, Belgian origin in itself does not necessarily guarantee sustainable production. Lidl is the only supermarket that also reports on the origin of fruits and vegetables from other countries.
- There are, however, specific promising practices in transparency across Belgian supermarkets, not in the least on certification of fish.

Transparency is the first step towards improvement. Knowledge about products' origin, cultivation, transport, and certification enables the supermarket to try and increase its sales of sustainable products. This information also gives policymakers and society greater insight into the transition towards a sustainable food system. Only if supermarkets are transparent, will it become possible to properly compare their practices and analyse progress over time. Therefore, this indicator primarily measures the transparency of the supermarket, rather than the sustainability of the food it sells.

This research looked into the extent to which supermarkets report about the origin, certificates, cultivation method and transport method of vegetables and fruit, eggs, dairy, meat and fish.

**Transparency about origin**

| | ALDI | Carrefour | colruyt | DELHAIZE | LIDL[3] |
|---|---|---|---|---|---|
| **Cultivation method** | X | X | X | X | X |
| **Origin** | * 90% Belgian meat<br>* ≥ 43% Belgian vegetables[4] | * 100% Belgian eggs[1]<br>* 100% Belgian milk[1]<br>* 92% Belgian meat[1] | – | * 70% of all products Belgian[2]<br>* 70% of fruits and vegetables Belgian[2]<br>* 90% of meat products Belgian[2] | * 20% belgian fruits<br>* 50% belgian vegetables<br>* 7 % Dutch fruits & vegetables<br>* 19% Spanish fruits & vegetables<br>* 3% Italian fruits & vegetables<br>* 22% oversea fruits & vegetables (non-EU) |
| **Transport** | X | X | X | X | X |

1 Carrefour reports on the Belgian share of its own brand meat, milk and eggs.. For meat and milk, they do not mention whether the numbers referred to their assortment or sales. They therefore do not score points for this.
2 Delhaize is not clear in their reporting whether the numbers referred to their full assortment, or their private label assortment. The assumption is made that it is about their own brand, thus private label.
3 Lidl mentions that eggs, milk, poultry and meat products are almost 100% from Belgian origin. This is not concrete enough.
4 Aldi reports that 82% of the vegetables are Belgian in the summer, and 43% in the winter. For fruit, Aldi only lists the indigenous fruits, and they do not indicate what share this amounts to in total fruit sales.

*Figure 13. This table gives an overview of what supermarkets publish about the origin, cultivation method and transport of fresh and preserved vegetables and fruit, eggs, dairy, meat and fish, in their assortment or total sales.*

**Little transparency among supermarkets on environmental certifications**

| | ALDI | Carrefour | colruyt | DELHAIZE | LIDL |
|---|---|---|---|---|---|
| Vegetables & fruit | * 13% organic[1] | – | – | – | – |
| Eggs | | – | – | – | – |
| Dairy | | – | – | – | – |
| Meat | | – | – | – | – |
| Fish | * 73% Bio/ASC/ MSC[2] | * 18% Bio/ASC/ MSC[3] | * 89% Bio/ASC/ MSC[4] | – | * 76% Bio/ASC/ MSC |

1 Aldi limits its reporting to the amount of organic in the total volume of private label products. In practice, the assortment of Aldi mainly consists of private label. Aldi also gives the total numbers of organic products on their entire assortment, and doesn't divide this over the different categories.
2 Aldi reports that 2.8% of the fish is certified by GLOBAL G.A.P. However, since GLOBAL G.A.P. is not seen as a sufficient certification by Superlist at this point, this percentage was not included in the scoring.
3 Carrefour limits its reporting to Group Level Reporting of Private Label. This percentage of Bio, ASC & MSC fish is deduced from their reporting.
4 Colruyt mentions that (1) 85.4% of wild caught (shell)fish in their private label is MSC certified and (2) 94.6% of their farmed (shell)fish in their private label is Bio or ASC certified. The total amount of certified fish products = 170 + 105 = 275 certified products (rounded), out of a total of 310.This makes 88.69%.

*Figure 14. This table gives an overview of what supermarkets publish about the environmental certifications of fresh and preserved vegetables and fruit, eggs, dairy, meat and fish, in their assortment or total sales.*

Overall (see figures 13 and 14), none of the supermarkets report on the transport method, and the cultivation method was only reported on as part of the certification (e.g. 'organic cultivation'). The certification of fish was however often reported in great detail. When reporting on the origin of products, all supermarkets, except Lidl, only mention the Belgian share, and do not mention other countries. Lidl, followed by Aldi, is most transparent, but all supermarkets have potential to be much more transparent.

## What do supermarkets say about sustainable agriculture?

*"Vandaag is reeds 90% van al het vers vlees in producten van ALDI van Belgische origine."*

Aldi België, 2022a

*"70% van het assortiment van Delhaize is 'made in Belgium'."*

Delhaize België, 2020

*"Wist je trouwens dat 50% van onze groenten en 20% van ons fruit nu al de Belgische driekleur draagt? En voor het vlees, gevogelte, eieren en melk in de rekken van Lidl, zitten we bijna aan het mooie ronde getal van 100%."*

Lidl België & Luxemburg, 2021

Supermarkets only report on the Belgian share of their products. Moreover, Belgian origin does not automatically guarantee sustainable produce. For instance, Belgian fruits and vegetables can be produced off-season in greenhouses, leaving a big ecological footprint. Belgian meat can come from cows that have been fed soy that is linked to deforestation. Information on the origin of a product is therefore an important piece of information, alongside other information.

this counts

**Lidl** reports on both the origin and certification of a portion of its products, and is the only supermarket to offer transparency about the origin of countries other than Belgium. Lidl reports that 20 per cent of the fresh fruits and 50 per cent of the fresh vegetables have a Belgian origin (Lidl België & Luxemburg, 2021). In addition, they published a map on their website that shows the origin of their fruits and vegetables in more detail (Lidl België, 2022c). Lidl also reports that 76 per cent of their (shell)fish is certified ASC, MSC or BIO, and 100% of their private label fresh, frozen and canned fish (Lidl België & Luxemburg, 2021). Milk, poultry and meat are not reported on in detail[16]. Eggs are reported to originate solely from the EU, but no countries were specified(Lidl België & Luxemburg, 2021).

good step

Among others, a noteworthy practice from **Lidl** is the collaboration with an independent audit company (Ecovadis), which investigates the impact of their transporters (Lidl België & Luxemburg, 2021)[17]. **Lidl** also started a consortium to help Belgian farmers with carbon farming (Lidl België, 2022b).

this counts

**Aldi** reports on the share of Belgian meat products (90 per cent) (Aldi België, 2022a), and the share of Belgian vegetables in the winter and summer (Aldi Belgium, 2022h). Additionally, they also report on the share of certified (private label) fish products (73 per cent) (Aldi België, 2022g) and on the share of private label products with an EU-BIO label throughout their entire

16 For instance, Lidl mentions that "almost 100 percent" of the assortment is Belgian, but does not specify this.

17 They have done this for the transport companies which make up 25 per cent of their distribution and have started implementing this on their Tier 2 companies as well.

assortment in Belgium (12.8 per cent) (Aldi België, 2022f). An example of an interesting practice in **Aldi** supermarkets is the ATC code, a transparency QR code on a portion of its meat products, allowing customers to see the origin and certification of the product. Although this is an interesting initiative in transparency, this will mostly reach younger consumers that have a prior interest in the sustainability of the purchased products.

**Carrefour** reports that their private label eggs and milk are 100 per cent of Belgian origin and 92 per cent of the private label meat products are of Belgian origin (Carrefour België, 2021). In addition, they report on the share of certified fish sold. Of the private label fresh fish, eighteen per cent is certified MSC, ASC or Organic (Carrefour Group, 2022b). One of **Carrefour**'s noteworthy efforts includes publishing a list of Belgian fisheries that partake in the Carrefour Quality Line (CQL), in which fish can be traced back to the ship or farm (Carrefour Group, 2022a). Another inspiring practice is Lever 1 of **Carrefour**'s action plan. Farmers are supported to switch to organic farming through long-term contracts, in which Carrefour commits to purchase volumes and intermediate pricing procedures.

Delhaize is the only supermarket that does not report on the certification of any products. Delhaize does mention that a portion of their seafood products are ASC or MSC certified, but do not specify how large the proportion is. Delhaize does report on origin, but limits itself to Belgian products. **Delhaize** reports that 90 per cent of their private label meat products, 70 per cent of their private label fresh fruit and vegetable products, and 70 per cent of the entire private label assortment originate from Belgium (Delhaize België, 2020). Remarkably, Albert Heijn is very transparent on these criteria in the Netherlands, unlike Delhaize which is part of the same Ahold Delhaize holding.

Colruyt is the only supermarket that does not report[18] on the origin of its products. **Colruyt** does report that 88.69 per cent of their private label fish products carry a relevant environmental certification (Colruyt, 2022k). **Colruyt**'s ambition to launch at least two pilot studies on carbon farming by the end of 2024 looks promising (Colruyt, 2022d). **Colruyt** also invests in Eco-score labelling for their assortment (Colruyt, 2022f). Since Eco-score is currently based on average values for every product type, it does not allow us to have differentiated information per product with origin taken into account, which is a condition for full transparency. Nevertheless, Eco-score is considered to be a practice with a lot of potential.

18 Colruyt does, however, report on the origin of specific products or brands, but not on complete product groups.

# Supermarkets place responsibility for finding and choosing sustainably with the customer

## EN-2.2.1 To what extent does the supermarket's assortment meet relevant sustainable agriculture requirements?

- Supermarkets do not guarantee that their entire assortment meets a minimum criteria of sustainability.
- Aldi and Lidl do not offer any sustainable option in about half of the researched product types. Lidl is, however, also the only supermarket offering only black tea with a relevant sustainability certificate.
- Carrefour, Colruyt and Delhaize offer at least one sustainable option in (almost) every researched product type.

When all products in a product type offered by a supermarket guarantee a minimum sustainability level, the supermarket takes full responsibility for ensuring a low environmental impact of that product type. When products with and without relevant environmental certification are offered, the supermarket places the responsibility to buy sustainably with the customer. The customer then has to find, assess and choose the most sustainable product.


*Figure 15. Example of different levels of responsibility that supermarkets take for being nature-inclusive.*

This research looks into the extent to which a supermarket's assortment is covered by relevant certificates or company purchasing programmes that take into account environment and nature[19]. A selection was made of clearly defined product types that are widely sold by supermarkets and that reflect the extent to which a supermarket takes responsibility. Each researched product type is labelled with a level of responsibility[20].

**Supermarkets place responsibility to buy sustainable with the customer**

| | | ALDI | Carrefour | colruyt | DELHAIZE | LIDL |
|---|---|---|---|---|---|---|
| **Animal-based** | Milk (natural) | | | | | |
| | Yoghurt (natural) | | | | | |
| | Gouda (natural, slices) | | | | | |
| | Eggs | | | | | |
| | Minced Beef (natural) | | | | | |
| | Brochettes | | | | | |
| | Sausage | | | | | |
| **Fresh fruits** | Banana | | | | | |
| | Apple | | | | | |
| | Orange | | | | | |
| | Tangerine | | | | | |
| | Melon | | | | | |
| | Pear | | | | | |
| | Grapes | | | | | |
| **Fresh vegetables** | Tomato | | | | | |
| | Carrot | | | | | |
| | Onion | | | | | |
| | Chicory | | | | | |
| | Lettuce | | | | | |
| | Bell peppers | | | | | |
| | Courgette | | | | | |

No responsible option available (no product with a relevant environmental certification)

Supermarkets place responsibility for a sustainable choice with the customer (products with and without relevant environmental certification)

Supermarket takes full responsibility (all products have a relevant environmental certification).

19 See appendix 4 Relevant certificates for an overview or certificates included.

20 For this indicator, certifications are researched to assess whether or not a product meets the relevant sustainability requirements. Although this currently is the only solid way to measure relevant requirements at a product level, it should be acknowledged that certain individual supermarket policies might have been overlooked.

| Supermarkets place responsibility to buy sustainable with the customer | | | | | | |
|---|---|---|---|---|---|---|
| **Other** | Potatoes | | | | | |
| | Pasta | | | | | |
| | Rice | | | | | |
| | Chocolate tablets | | | | | |
| | Filter coffee and coffee beans | | | | | |
| | Tea (black) | | | | | |
| | **Final score** | **0.4** | **0.9** | **1.0** | **1.0** | **0.7** |

*Figure 16. This table shows where the responsibility for a sustainable purchase is placed. For an explanation of what the colours mean, see the picture at page 41.*

Apart from one exception (for one product type), none of the supermarkets take full responsibility by offering only products within a product type that meet the minimum sustainability requirements. Therefore, they place the responsibility to make a sustainable purchase on the customer at best.

this counts

**Delhaize** offers at least one sustainable option in every researched product type. **Colruyt** and **Carrefour** also give customers a sustainable choice in almost every product type, except for respectively one and three product types, out of the 27 researched product types.

At Aldi, more than half of the investigated product types do not include any products that meet the minimum sustainability requirements. Aldi also the only supermarket that does not offer a sustainable option for natural yoghurt, slices of Gouda cheese, bell pepper, and rice.

this counts

Lidl[21] also does not offer sustainable options in about half of the researched product types. However, **Lidl** does exclusively offer black tea with the relevant environmental certification, making them the only supermarket that takes full responsibility in one product type.

## How does this count in the ranking?

This chapter shows the outcomes with regard to the indicators on sustainable agriculture in a broad sense. The next chapter analyses the indicators that are relevant for deforestation and land conversion in international food chains. In the research methodology, sustainable agriculture (including deforestation) is one topic. Therefore, the overall results on all indicators within sustainable agriculture are combined in a figure at the end of the next chapter.

21 For Lidl we analysed their assortment in Mariakerke, which is a large store. It is possible that, in other branches their assortment differs from the one in Mariakerke.

**Spotted on-site: Sustainable agriculture**


*Figure 17. Label differentiation for sustainable products (Carrefour, Colruyt).*


*Figure 18. Point-of-sale materials highlighting sustainable products (Carrefour, Lidl).*

## Spotted on-site: Sustainable agriculture


*Figure 19. 'Rayonkoppen' highlighting sustainable products (Carrefour, Colruyt).*

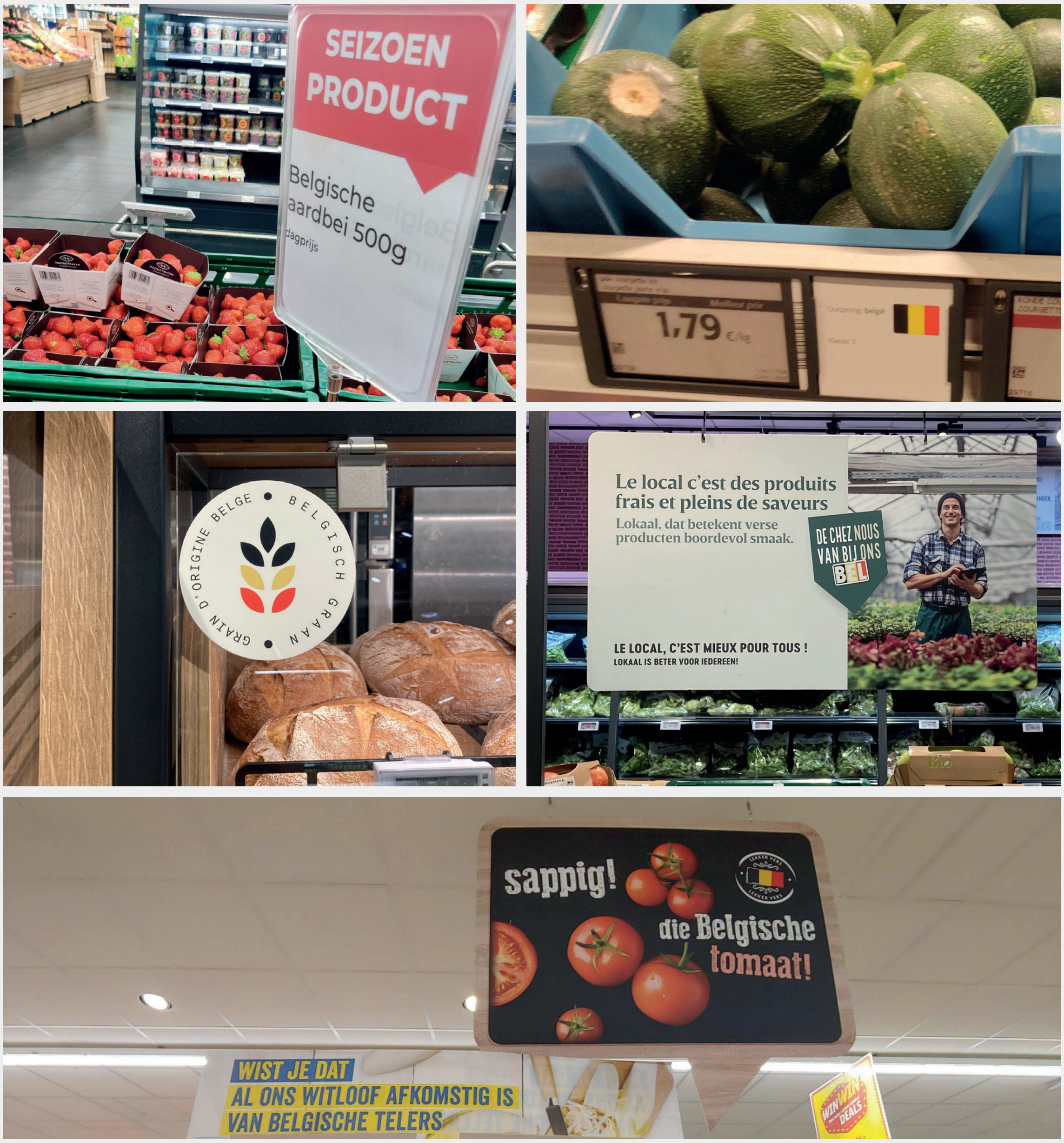



*Figure 20. Point-of-sale materials highlighting seasonally and locally produced food. (Carrefour, Aldi, Colruyt, Delhaize, Lidl)*

Sustainable agriculture

# Efforts against deforestation are limited, transparency should increase

- Most efforts against deforestation focus on private label products. Actions beyond supermarkets' own supply chains are missing.
- Supermarkets are hardly transparent on the origin of soy for animal feed, palm oil and cocoa and concrete action plans are mostly missing.
- However, there are some promising policies, such as supporting and purchasing from sustainable soy farmers, and committing to certifying all cocoa in the upcoming years.

Within the topic of sustainable agriculture, deforestation plays an important role in the loss of biodiversity and climate change. The most important forest-risk commodities for embedded deforestation and $CO_2$ emissions in Belgium are soybeans and palm oil (Bager, Persson, and dos Reis, 2021). Furthermore, cocoa is a popular commodity in Belgium, but also an important forest-risk commodity. To mitigate the risk of deforestation, European supermarkets should encourage and support upstream supply actors to become 100 per cent sustainable. Going forward, they should only work with upstream actors that are not involved in any unsustainable activities (or that have a clear action plan on how to achieve sustainable production within a well-defined period of time), such as deforestation or the conversion of nature.

## What has been researched?

Supermarkets were examined on the following three criteria:

- To what extent does the supermarket take action to stop deforestation linked to the use of **soy in animal feed?**
- To what extent does the supermarket take action to stop deforestation linked to the use of **palm oil** in its products?
- To what extent does the supermarket take action to stop deforestation linked to the use of **cocoa** in its products?

More information about the research method can be found in appendix 4. The precise criteria[22] can be found in the document 'Superlist Environment Belgium 2022 - Research methodology' (Questionmark, 2022). All measures that comply with these criteria, will add to the supermarket's ranking.

22 For palm oil a slight modification has been made to the scaling to more accurately reflect the efforts of supermarkets on the three topics. For more information, see appendix 1

# Action plans on soy for animal feed are fragmented, transparency is lacking

## 2.3.1 To what extent does the supermarket take action to stop deforestation linked to the use of soy in animal feed?

- Overall, transparency and action plans to further decrease the risk of deforestation and land conversion in the supermarkets' supply chain are missing.
- Supermarkets only take action on private label soy. Their policies do not cover A-brands.
- Most supermarkets did set a cut-off date or target-date with regard to purchasing deforestation-free soy.

Soy is often used as animal feed for the production of animal products such as meat, cheese and milk[23]. However, the cultivation of soy requires a lot of space, often at the expense of forested areas and other important ecosystems (WWF, 2019). In addition, the import of soy is a key driver of the nitrogen surplus.

Supermarkets' publicly available publications were researched to check which action(s) they are taking to stop deforestation and land conversion linked to the production of soy for animal feed.

This analysis includes soy in feed for all products that have animal proteins (including meat, fish, egg and all dairy products) as their main ingredient. Wild meat and fish are excluded[24]. The research looks at (1) whether supermarkets are setting a deforestation-free target date, (2) are transparent about the supply chain, (3) if they try to exclude deforestation via certification and whether they have an action plan, and (4) report on this action plan[25].

23 That is why e.g. meat of Belgian origin can still have an environmental impact beyond Belgium. Soy is mostly produced outside Belgium and imported for animal feed, thus also for meat of Belgian origin. Therefore, Belgian meat can also contribute to deforestation/land conversion.

24 Supermarkets often only report on their own private label products. Therefore, a private label factor has been applied to adjust the scoring to the private label share (see Appendix 4). In the case of deforestation policies, all supermarkets report only on private label soy. Therefore, the private label factor has a profound impact on the scoring of the supermarkets.

25 It is worth noting that most reporting is done on group level, as opposed to on a national level: 'Aldi Nord', 'Carrefour Group', 'Colruyt Group', 'Ahold Delhaize', and 'Lidl Belgium and Luxembourg'. As this limits the accountability of a supermarket towards the citizens of a specific country, Superlist encourages reporting on the national level.

| Deforestation due to soy used for feed is hardly prevented | ALDI | Carrefour | colruyt | DELHAIZE | LIDL |
|---|---|---|---|---|---|
| **Accountability via cut-off and target date** | 2.4 pt** | 1 pt** | 0 pt** | 0.4 pt** | 2.4 pt** |
| Has the supermarket set a cut-off date for deforestation-free soy? | **Yes** (1/1/2020) | **Yes** (1/1/2020) | **No** | **No** | **Yes** (1/1/2020) |
| Has the supermarket set a target date for deforestation-free soy? | **Yes** (31/12/2030) | **No** | **No** | **Yes** (01/01/2025) | **No** |
| **Is the retailer transparent about their suppliers?** | **No** insight | 0.01** pt | **No** insight | **No** insight | **No** insight |
| **Implementation and control** | 0 pt** | 0.2 pt** | 2.4 pt** | 0 pt** | 6.8 pt** |
| Does the supermarket guarantee deforestation-free soy in feed via certificates? | unk. | 100% unknown risk** | 100%** | unk. | 100%** |
| Is the supermarket a member of an action-oriented platform? | **Yes***, RTRS and Danube soy association | **Yes***, RTRS | **Yes*****, RTRS | **Yes***, RTRS | **Yes***, RTRS |
| Has the supermarket published a concrete action plan[1]? | **No** | **Yes*** | **No** | **No** | **No** |
| Deforestation-free in purchasing policy | **No** | **No** | **No** | **No** | **No** |
| **Does the supermarket report on the action plan at least yearly?** | **No** | **No** | **No** | **No** | **No** |
| **Total points** | **2.4** | **1.2** | **2.4** | **0.4** | **9.2** |
| Maximum achievable score | 40 points | | | | |

* No points scored due to not reaching a minimum score of 2 on the baseline parameter.
** The score has been multiplied by the private label factor as the policy reports solely on private label products.
*** Colruyt indicated just before publication of this report that they are a member of RTRS. This is correct, but is not communicated on the Colruyt website itself. This is not included in the scoring.

*Figure 21. This table gives an overview of the interventions of the supermarket, as found in publicly available publications, to stop deforestation linked to the production of soy in animal feed.*

All supermarkets actively implement at least one action to reduce their impact concerning soy-linked deforestation (Ahold Delhaize, 2022; Aldi België, 2022d; Lidl, 2021; Colruyt, 2022h; Carrefour Group, 2021a). For instance, all supermarkets except Colruyt Group specify a cut-off and/or target date[26] and three out of five supermarkets guarantee deforestation-free soy in feed via certificates. Overall transparency in the supply chain is however still lacking; none of the supermarkets are transparent about the origin of the soy or the suppliers of the soy. None of the supermarkets have published a concrete action plan to reduce the risk of deforestation and land conversion. Most supermarkets do report on so-called shares of 'high priority' countries[27]. Supermarkets appear to have different focuses concerning soy policy. Some focus on a policy for deforestation-free-targets (Aldi, Carrefour, Delhaize and Lidl), while others focus on certifying their private label soy (Colruy, Carrefour and Lidl). Lidl performs best on soy policy, although it makes little effort aside from certification. For instance, exact knowledge about their supply-chain and concrete action plans are missing.

### Loose certificates for sustainable soy ('RTRS credits')

The Round Table on Responsible Soy Association (RTRS) is the main organisation for sustainable soy and also trades certificates for deforestation-free soy separately from the actual soy. A soy plantation that has been assessed as 'deforestation-free' can sell that assessment on paper to a third party as RTRS credits. When, for example, a livestock farmer has purchased undeclared soy as animal feed elsewhere and he purchases as many RTRS certificates as the actual soy, he can claim that all the soy he used is covered by sustainable cultivation.

By purchasing certificates, the farmer is thereby supporting a soy farmer who is working sustainably, but in practice the market for unsustainable soy is not being restricted. Certification through the 'mass balance' principle offers more guarantees. Certificates at the beginning of the production chain are linked to physical soybeans, but during processing the soybeans are possibly mixed with unsustainable soybeans.

In order to truly guarantee that the soy actually used has not contributed to deforestation, livestock farmers would have to purchase deforestation-free soy that is physically separated from unsustainable soy.

26 This is unlike supermarkets from the Netherlands who, in 2021, did not report any target in the Superlijst Groen research (Questionmark 2021).

27 However, the usage of high and low priority countries can induce leakages, thus Superlist has set criteria for reporting on national levels at the least.

this counts

**Lidl** is, compared to the other researched supermarkets, the frontrunner in their efforts for fighting deforestation related to soy in feed, mainly due to the full certification of private label soy. A supermarket is responsible for their entire assortment of products and since the private label assortment[28] of both Lidl and Aldi is very high compared to the other supermarkets, their policy covers a much larger part of their total assortment. Lidl also incorporates a cut-off date in their policy (cut-off date: 01/01/2020) and is meeting the transparency baseline for the RTRS/Danube Soy certification of their private label meat products containing soy. Lidl is also a member of the Round Table on Responsible Soy (Lidl België, 2021). Lidl has not published a clear action plan. Lidl has, however, published a Position Paper on soy in 2018 (Lidl België & Luxemburg, 2018), but no clear targets are mentioned in this action plan and no annual reporting on the progress has taken place since 2018.

this counts

**Aldi** is the only supermarket with both a cut-off and a target date for deforestation-free soy (Aldi België, 2022d; 2021a). However, Aldi fails to report on the remaining measures investigated for this topic and for instance does not report the amount of certified (e.g. RTRS) soy. Due to not meeting the baseline parameter (transparency on deforestation-free soy in animal feed), its third party collaboration with both RTRS or the Danube Soy Association were not rewarded in the scoring on this topic (Aldi België, 2022d).

this counts

**Colruyt** has environmental certifications for soy in animal feed for all private label products (Colruyt, 2022k). However, their policy does not include deforestation- and conversion-free targets, transparency on the supply chain, an action plan, a detailed purchasing policy or the mention of a third party collaboration. Furthermore, Colruyt does not communicate on deforestation explicitly. Also, whereas other supermarkets proactively use EU law vocabulary and criteria in preparation for the upcoming EU legislation, Colruyt merely complies with certification schemes. However, it takes average initiative overall against deforestation related to soy due to offsetting all of their private label soy by RTRS credits. It is also noteworthy that **Colruyt** purchased 68 per cent of its RTRS credits from a cooperative that the supermarket has supported in its transition to more sustainable soy.

good step

this counts

**Carrefour** reports that 5.5 per cent of their soy originates from Brazil (see quote). The remaining 94.5 per cent of their soy is not reported on a country or region specific level (Carrefour Group, 2021b). However, **Carrefour** did classify this 'unknown' part of their sourced soy as 'high risk' soy. Classifying unknown soy as high risk soy is considered to be a good practice, since transparency is the first step to improvement. Additionally, Carrefour also reports on the share of soy without known certificates, which - unfortunately - is 100 per cent (Carrefour Group, 2021b).

good step

28 See appendix 2 for more information on how we take policy on private label into account.

The third party collaboration (member of RTRS) and the publication of an action plan was, just as for Aldi, not included in the scoring on this topic due to not meeting the baseline parameter in transparency. Carrefour does implement a cut-off date by 01/01/2020, but was vague on the target date. They formulated a target date by 2025 for soy used in livestock feed to be deforestation-free. However, they excluded first-price and no-name products, placing the responsibility with their customers. They also did not report on their share of the total range (Carrefour Group, 2021a). Additionally, Carrefour does not offer a clear deforestation-free definition. Carrefour communicates on criteria for 'deforestation-free' - these are however, not clear and ambitious enough, since they are interpreted as optional or trade-offs.

this counts

Delhaize takes the least action to stop deforestation linked to the use of soy in their animal feed. **Delhaize** only sets a target date (by 2025) (Ahold Delhaize, 2021), which is only applicable to their private label products.

good step

**Delhaize** is a member of RTRS but, similar to Aldi and Carrefour, this was not included in the scoring on this topic due to not meeting the transparency baseline. The ambition to certify all private label soy is mentioned, albeit without a concrete target date (Ahold Delhaize, 2021).

## What do supermarkets say about soy and deforestation?

*"As a cross-standard cut-off date for any commodity, we refer to the 01.01.2020. The cut-off date marks the date after which no deforestation or conversion of land to produce the commodity can take place."*

Aldi België, 2022d

*"Brazilian soy of guaranteed origin accounts for 5.5% of the overall footprint. This includes soy that is physically certified according to the Proterra or RTRS standard and soy from low-risk Brazilian municipalities (according to internal soy mapping). (...) Soy of moderate or low-risk origin accounts for 6.4% and includes soy from Europe, Canada, USA, India, etc."*

Carrefour Group, 2021b

*"Soy in animal feed: 100% offset by RTRS credits (Round Table on Responsible Soy), 67,8% of which were purchased from a cooperative we supported in its transition to more sustainable soy."*

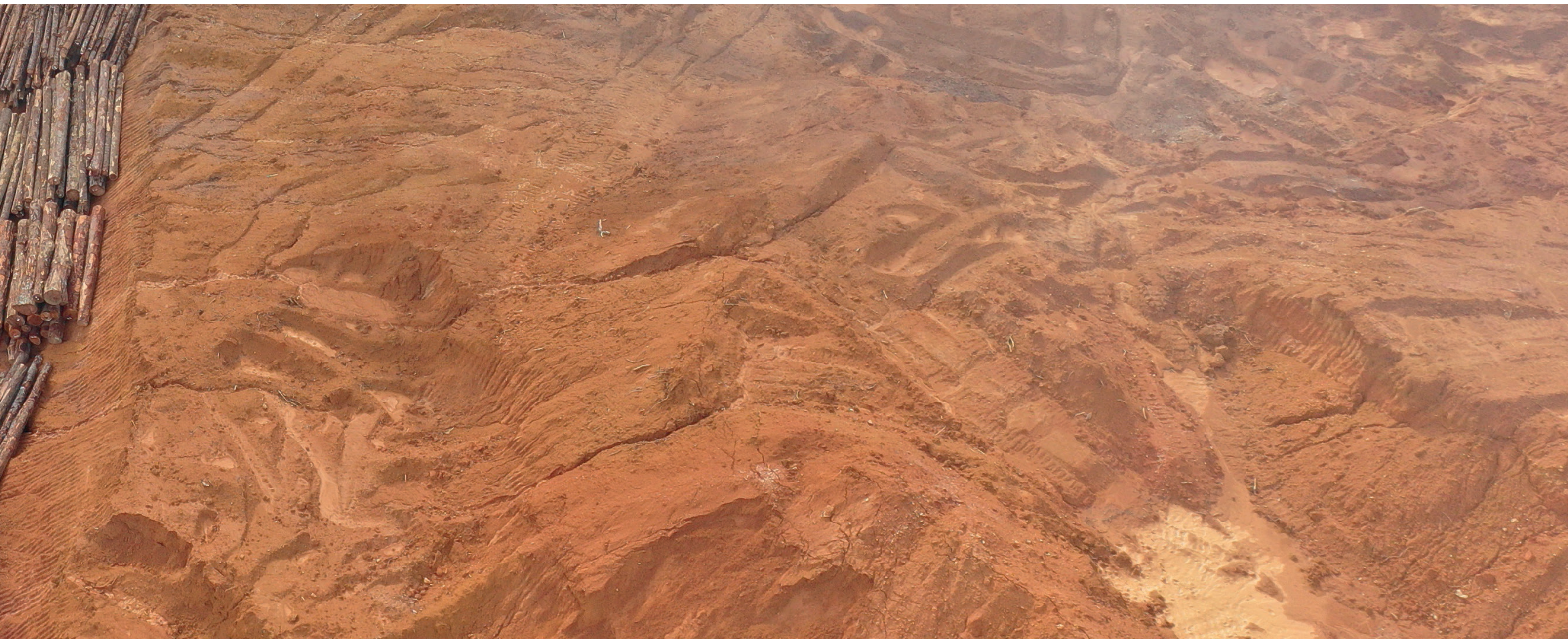
Colruyt Group, 2022k

*: "Ahold Delhaize and our brands aim to achieve zero deforestation and conversion by 2025 through 100% sustainable sourcing of soy, palm oil, cocoa, coffee, tea and wood fibre for our own-brand products."*

Ahold Delhaize, 2021

*"Our commitment to preventing deforestation and conversion of key ecosystems, together with our procurement policy, processes and guidelines, is based on an overall end date of January 1, 2020. In practice, this means that Lidl does not use raw materials produced on land that has been deforested or converted after January 1, 2020."*

Lidl België, 2021



# Efforts for deforestation-free palm oil focus on private labels

## EN-2.3.2 To what extent does the supermarket take action to stop deforestation linked to the use of palm oil in its products?

- Palm oil in private label products is mostly certified, albeit for a large part through the book-and-claim approach.
- Carrefour takes the most action against deforestation linked to palm oil outside of its own supply chain.
- Lidl is the only supermarket that expects suppliers to have a commitment to sourcing deforestation- and conversion-free palm oil.

Palm oil is used in a wide range of products, from cosmetics and detergents to candles and biscuits. Worldwide, (tropical) forests and peatlands are burned down to create palm oil plantations. This practice puts local communities and plantation workers at high risk of having their human rights violated, and has a major impact on the climate and ecosystems. For this indicator, the methodology and outcome of the Palm Oil Buyers Scorecard was used, as developed by the World Wildlife Fund (WWF, 2021)[29].

29 This Superlist report looks into efforts guaranteeing the sustainability of used palm oil. There is an ongoing discussion on the favorability of trying to decrease the use of palm oil altogether, and therefore mitigating deforestation linked to palm oil (Solidaridad, 2022). Opponents of this viewpoint state that this would merely shift the problem of deforestation to other vegetable oil crops, which furthermore are (much) less productive than palm oil.

**Policy on palm oil is limited to private label**

| | ALDI | Carrefour | colruyt | DELHAIZE | LIDL |
|---|---|---|---|---|---|
| **Purchasing sustainable palm oil (max 16 pt)** | 10.6 | 12.2 | 13.4 | 9.5 | 13.9 |
| Certified palm oil in private label | **Yes** | **Yes** (1% uncertified) | **Yes** | **Yes** | Partially (7% uncertified) |
| Does the company expect suppliers to have a commitment to sourcing deforestation- and conversion-free palm oil? | **No** | Partially | **No** | **No** | **Yes** |
| Demands traceable palm oil to all suppliers | **No** | **No** | **No** | **No** | **No** |
| **Other contributions** | 5 | 6 | 1 | 2 | 2 |
| Member of RSPO | **Yes** | **Yes** | **Yes** | **Yes** | **Yes** |
| Member of other action-oriënted platform | **No** | **Yes** | **No** | **Yes** | **Yes** |
| Investments outside of own supply chain | **Yes** | **Yes** | **No** | **No** | **No** |
| **Total points** | **15.6** | **18.2** | **14.4** | **11.5** | **15.9** |
| **Maximum achievable score** | 22 points | | | | |

*Figure 22. This table gives an overview of the interventions of the supermarket to fight deforestation linked to Palmoil. This information in this table is based on the most recent published Palm Oil Buyers Scorecard (WWF, 2021)*

All supermarkets have a policy on the sustainability of palm oil in their private label product assortment. This mostly boils down to a target to only buy Roundtable of Sustainable Palm Oil (RSPO) certified palm oil. Most supermarkets came close to that goal. In 2021, 100 per cent of the palmoil of **Aldi**, **Colruyt** and **Delhaize** was RSPO certified (Colruyt, 2022k; Aldi België, 2022g; Ahold Delhaize, 2021). For **Carrefour and Lidl**[30], this is respectively 99 and 93 per cent (Carrefour Group, 2022d; Lidl België & Luxemburg, 2021). Part of this palm oil is segregated or identity preserved, but a large part is covered by buying RSPO certificates, the so-called 'book and claim' approach (see the text box below). This method does not offer any guarantee against deforestation.

**Colruyt** and **Lidl** take the lead in buying palm oil that is segregated or identity preserved (respectively 85 and 84 per cent) (Colruyt, 2021). Delhaize stays behind with only 33 per cent segregated or identity-preserved palm oil (WWF, 2021).

30 Data from the Palm Oil Scorecard is used. For Lidl Belgium all palm oil in private label products is RSPO certified (segregated and mass-balance) (Lidl België & Luxemburg, 2022).

### Separate certificates for sustainable palm oil ('book & claim')

The organisation for sustainable palm oil, RSPO (Roundtable of Sustainable Palm Oil), also trades certificates for sustainable palm oil separately from the actual palm oil. A palm oil plantation that has been certified as sustainable can sell its 'sustainability' on paper via RSPO to a party - for example a supermarket - that has used unapproved palm oil in its products. The origin of the actually used palm oil is then usually unknown. By purchasing as many RSPO certificates as palm oil, the supermarket can claim that all palm oil used is 'covered' by sustainable cultivation.

With the purchase of such certificates, the supermarket therefore supports a sustainably operating palm oil farmer, but in practice the market for unsustainable palm oil is not being restricted.

To have more assurance that the palm oil actually used has not contributed to deforestation, supermarkets should purchase sustainably grown palm oil that is physically separated from unsustainable palm oil.

this counts

**All supermarkets** are members of the RSPO (Carrefour Group, 2022a; Ahold Delhaize, 2021; Colruyt, 2022k; Lidl België & Luxemburg, 2021; Aldi Nord, 2022). **Carrefour**, **Ahold Delhaize and Lidl** are also members of other action-oriënted platforms (WWF, 2021). Delhaize for instance is a member of the Palm Oil Transparency Coalition and the Retailers Palm Oil Group. Carrefour is a member of the Consumer Goods Forum Forest Positive Coalition. Lidl is a member of FONAP and - like Delhaize - the Retailer Palm Oil Group.

this counts

**Carrefour and Aldi** stand out by doing more beyond their own supply chain through ground investments (WWF, 2021). Aldi invests in smallholders, forest protection and land restoration, while Carrefour invests in landscape and jurisdictional approaches.

this counts

Besides buying certified palm oil, supermarkets can also ask their suppliers for guarantees on processed palm oil in their products. They can ask their suppliers to only use traceable palm oil. **Lidl** is taking the lead here by having a public commitment to sourcing deforestation- and conversion free palm oil. Lidl also has monitoring and response systems in place to verify supplier compliance with deforestation and conversion free commitments.

Since supermarkets mostly focus their efforts on certifying palm oil in their private label products and not in the non-private label products, they place the responsibility to make sustainable purchases on customers (and the producers of these products).

# Policies on deforestation-free cocoa lack verifiable detail

## EN-2.3.3 To what extent does the supermarket take action to stop deforestation linked to the use of cocoa in its products?

- None of the supermarkets have a concrete action plan to fight deforestation in cocoa.
- Most certifications and policy efforts focus on private label products.
- All supermarkets have committed to the Beyond Chocolate programme, aiming to only sell certified chocolate in Belgium by 2025.

Cocoa is not only a popular Belgian commodity, but also a very important forest-risk commodity. Belgium is Europe's second-largest direct cocoa bean importer and an important distributor of cocoa derivatives, mainly for cocoa-processing industries in neighbouring countries (CBI, 2020).

For cocoa, publicly available reports were investigated to assess whether supermarkets:

- set a deforestation-free target date,
- are transparent about the supply chain,
- have a concrete action plan and carry out implementation and control and,
- report on this action plan

| Supermarket hardly takes measures in fighting deforestation related to cocoa | | | | | |
|---|---|---|---|---|---|
| | ALDI | Carrefour | colruyt | DELHAIZE | LIDL |
| **Target deforestation-free cocoa** | Cut-off date 1.8 pt* | No target | No target | Target date 0.6 pt* | Cut-off date 1.6 pt* |
| **Transparency suppliers** | 0.9 pt* | 0 pt | 0 pt | 0 pt | 0 pt |
| Supply chain system | **Yes*** Mass balance | unk. | unk. | unk. | unk. |
| Publication of a list of suppliers | **No** | **No** | **No** | **No** | **No** |
| **Implementation and control** | 3.6 pt* | 0 pt | 1.6 pt* | 0.7 pt | 3.2 pt* |
| Deforestation-free cocoa | **Yes** 100%* | unk. | **Yes** 99.5%* | **Yes** 73%* | **Yes** 100%* |
| Action plan published | **No** | **No** | **No** | **No** | **No** |
| Deforestation- and land conversion-free within purchasing policy | **No** | **No** | **No** | **No** | **No** |
| **Reporting & actionplan** | 0 pt | 0 pt | 0 pt | 0 pt | 0 pt |
| **Total points** | **6.2** | **0** | **1.6** | **1.3** | **4.8** |
| **Maximum achievable score** | 28 points | | | | |

* The score has been multiplied by the private label factor as the policy reports solely on private label products.

*Figure 23. This table gives an overview of the interventions of the supermarket, as found in publicly available pucliations, to stop deforestation linked to the production cocoa.*

All supermarkets have committed to the Beyond Chocolate programme. However, apart from Aldi, policies on cocoa lack verifiable detail. As is the case for palm oil and soy, most efforts on cocoa also seem to focus on private label products. Therefore, supermarkets with mostly non private label products, place the responsibility to make sustainable purchases with customers (and the producers of these products). Also, reporting is primarily carried out at group level, apart from Lidl. Superlist encourages reporting at a national level.

this counts

**Aldi** has a clear and extended policy on cocoa (Aldi België, 2022d). They implement a cut-off date (0 1/01/2020) after which deforestation or conversion is no longer accepted, report on their supply chain system (unlike other Belgian supermarkets) and only use certified cocoa in their private label products (Aldi België, 2022g; Aldi Nord, 2015). Furthermore, Aldi mentions the aim to switch to a segregated supply chain system "when possible" (Aldi Nord, 2015).

this counts

**Lidl** also implements a cut-off date (01/01/2020). All private label products containing cocoa are certified by one of the following labels, all of which are seen as relevant environmental labels[31]: UTZ, Fair Trade (Sourcing), Rainforest Alliance or BIO (Lidl België & Luxemburg, 2020).

31 An overview of all relevant labels with an explanation why these labels are seen as relevant is explained in the Research Methodology (Questionmark, 2022)

**Colruyt** focuses on certifying its private label cocoa: 99.5 per cent of their private label products containing cocoa are certified with one of the following labels: UTZ, BIO or Fair Trade (Colruyt, 2022k). **Colruyt** aims to certify 100 per cent of their private label products containing cocoa by 2025. However, their policy does not include deforestation-free targets, making them the only Belgian supermarket without a target and/or cut-off date. They also do not offer transparency on the supply chain, formulate an action plan or a detailed purchasing policy. As such, policy was lacking for most interventions.

**Delhaize** sets a deforestation-free target for their cocoa (2025) (Ahold Delhaize, 2021). No cut-off date is mentioned. The target date for cocoa also only seems to be applicable for their private label products. Delhaize does mention in their sustainability report from 2019 that 73 per cent of their private label products that contain 5 per cent cocoa or more are Fairtrade, UTZ or Rainforest Alliance certified (Delhaize België, 2020). In the same report they set the goal to have 90 per cent of the cocoa certified by 2020, but a status update for this has not been given in the more recent sustainability reports. **Delhaize** shows promise by stating that they will certify all private label products containing cocoa by 2025 (Delhaize België, 2022a; Ahold Delhaize, 2021).

Carrefour mentions its Cocoa charter multiple times when communicating on the sustainability of (private label) cocoa. However, the charter itself was not publicly available[32]. Carrefour is not clear on any of the measures. The supermarket mentions a target date for their cocoa paste, but no-name and low price products are excluded. Additionally, they report on the share of sustainable coco, but do not specify how 'sustainable' is defined. No action plan or annual reporting on the matter was found.

## How does this count in the ranking?

On the topic of sustainable agriculture, Lidl performs best in comparison to the other supermarkets. Lidl is followed by Aldi, Carrefour, and Colruyt. Delhaize closes this ranking with least efforts on sustainable agriculture.

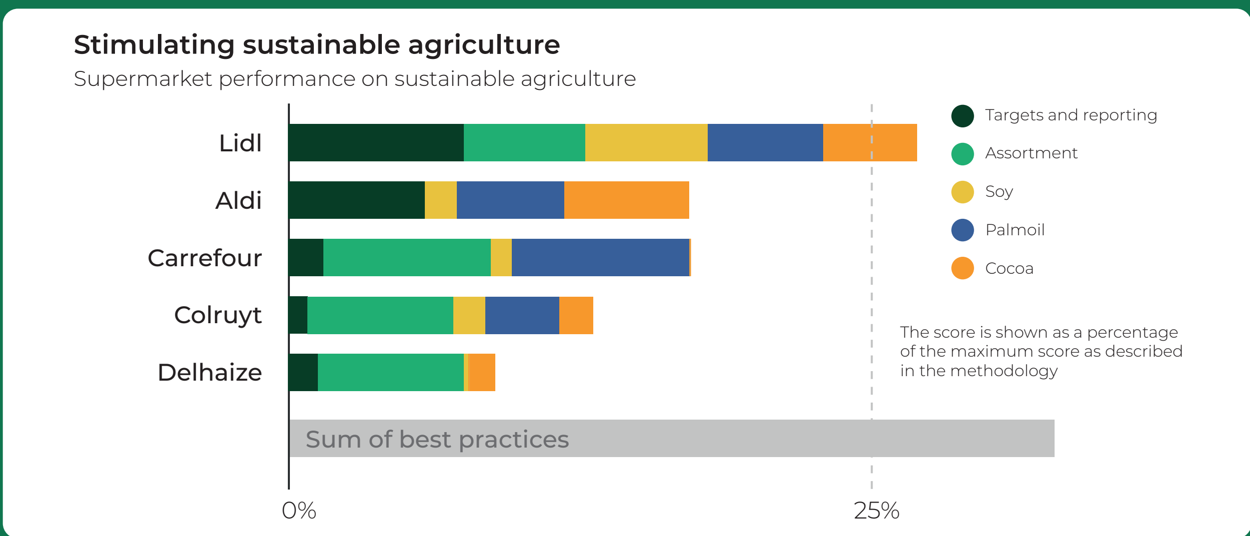



*Figure 24. Total performance of the supermarkt with regards to the topic 'sustainable agriculture'. The bar 'sum of best practices' shows the sum of current best practices found, and shows which progress supermarkets can easily make by learning from one another.* See appendix 1 for details on the scoring →

32 When asked for clarification, Carrefour refers to their commitment to the Beyond Chocolate agreement.

## Food waste

# Food waste is on the radar, but clear targets are missing

- Supermarkets are initiating action to fight food waste and food loss, yet clear definitions, measurable targets and reporting on these targets are mostly missing.
- Delhaize is the only supermarket with a concrete action plan.
- Other supermarkets do show potential for upgrading their policies to a verifiable approach.

The term ‘food loss’ refers to a decrease in the mass of edible food at any stage of the food chain before the supermarket/ consumption stage. ‘Food waste’ refers to throwing away food (or allowing it to spoil) that is fit for human consumption from the supermarket stage onwards.

Globally, food loss and food waste are responsible for about eight per cent of greenhouse gas emissions caused by mankind (Project Drawdown, 2020). It also uses up 24 per cent of all freshwater, 23 per cent of all fertilisers and 23 per cent of our cropland (Kummu et al., 2012).

A Flemish study from 2015 showed that Flanders’ annual food loss is around 907,000 tonnes, with 36 per cent of that amount coming from the agricultural sector, 25 per cent from the food industry and 23 per cent from private households (Voedselverlies, 2017). Supermarkets can combat both food loss and food waste.

Food loss can be avoided by optimising coordination between supermarkets and suppliers. As for food waste, supermarkets are not directly responsible for their customers' behaviour at home, but they do have an influence over people’s shopping behaviour, which in turn has an influence on the amount of food that customers waste. Campaigns that stimulate bulk purchases, impulse buying and fast sales, larger packaging and supermarket design, for example, can all make people buy more than they need, increasing the risk of food being thrown away (faster) at home. Consumers have indicated that one of the reasons for throwing away food is having bought too much food (Vlaamse overheid, 2019b).

Not all interventions have been studied or tested for their effectiveness. But the first step every supermarket can take is to formulate a plan in which it expresses an ambition to combat food loss and waste.

## What has been researched?

Supermarkets were examined on their efforts to fight food loss and food waste, where we checked:

- Whether supermarkets published an action plan with concrete interventions aimed at reducing food loss in the supply chain and/or food waste at the consumer stage.
- Whether the action plan includes (1) measurable targets, (2) clear definitions of figures and (3) monitoring/reporting.
- Whether supermarkets involve an independent third party to estimate the total volume of food loss and waste, and to assess the prioritisation of the interventions.

More information about the research method can be found in appendix 4. The precise criteria can be found in the document 'Superlist Environment Belgium 2022 - Research methodology’ (Questionmark, 2022). All measures that comply with these criteria, will add to the supermarket’s ranking.

# Supermarkets undertake first interventions in food waste and/or food loss, but it is clearly a work in progress

## EN-3.1.1 Has the supermarket published a concrete and measurable action plan aimed at reducing both food loss in the supply chain and food waste at the consumer stage?

- All supermarkets show beginning awareness on food waste and/or food loss, and they are all taking some action to fight it.
- Delhaize is the only supermarket with a concrete action plan. Other supermarkets can expand current policy to a concrete action plan.

On a first level of commitment towards food waste and food loss, the research focused on the extent to which supermarkets have formulated and carried out concrete interventions. Publicly available information was researched to assess which actions the supermarket takes to decrease food loss in the supply chain and food waste at the consumer stage[33].

Besides showing awareness and undertaking action, it is important for supermarkets to develop and publish measurable targets, clear definitions of figures, and a monitoring and reporting system. Only then can actions be structurally implemented and evaluated on their efficacy. Publicly available documents were screened for concrete interventions, measurable targets and clear definitions, and the involvement of an independent third party for estimating the food loss and waste, and for assessing and prioritising actions[34].

33 In level 1 of this indicator, the term ‘action plan’ is defined in the broadest sense, namely a plan to act. This way, every concrete intervention that is described in publicly available information is included. Furthermore, in order to value every effort made, supermarkets received half of the points, if they tackled only either food waste or food loss as opposed to both.

34 The second level of this indicator looks at whether a supermarket has a concrete action plan including measurable targets, clear definitions of figures and indicators, ánd a monitoring and reporting system. All three must be present to receive points, as these are considered minimum conditions for a verifiable approach on food waste and/or food loss.

| Concrete plans on food loss and food waste are missing | ALDI | Carrefour | colruyt | DELHAIZE | LIDL |
|---|---|---|---|---|---|
| **Did the supermarket publish an action plan with concrete interventions aimed at reducing food loss/food waste:** | | | | | |
| In the supply chain? (food loss) | ✓ | ✓* | ✓ | ✓ | – |
| At the supermarket/ consumer stage? (food waste) | ✓ | ✓* | ✓ | – | ✓ |
| **Did this action plan include:** | | | | | |
| measurable targets? | – | – | ✓*** | ✓*** | ✓** |
| reporting on these targets? | – | – | ✓*** | ✓*** | ✓** |
| clear definitions/ figures? | ✓ | – | – | ✓*** | – |
| **Is the data on food waste estimated by an independent third party?** | – | – | – | – | – |
| **Has an independent third party done an assessment of actions the supermarket should prioritise to combat both food lost and waste?** | – | – | – | – | – |
| **Total points** | **1** | **1** | **1** | **1.5** | **0.5** |

* Carrefour published an action plan at group level. It is not clear which of the measures listed in the 2020 action plan are applied in Belgium.

** Lidl only has measurable targets about reducing food waste at the supermarket level, no targets about reducing food loss in the supply chain or food waste at the consumer stage.

*** Colruyt and Delhaize only have measurable targets about reducing food loss in the supply chain, no targets about reducing waste loss at the supermarket/consumer stage.

*Figure 25. This table gives an overview of what supermarkets published with regards to fighting food waste at the consumer stage and food loss in the supply chain.*

All supermarkets are taking action against food waste and/or food loss, but apart from Delhaize, none of them have a concrete action plan including measurable targets, reporting on the targets ánd clear definitions. None of the supermarkets involve a third party to estimate the total food loss and waste, or to assess the interventions.

this counts

All supermarkets do, however, show awareness on food waste and/or food loss. **Aldi**, **Carrefour** and **Colruyt** undertake concrete interventions on *both* food loss in the supply chain *and* food waste at the consumer stage (Aldi Nord, 2021; Carrefour België, 2022a; Carrefour Group, 2022c; Colruyt, 2022e). **Delhaize** focuses its interventions solely on food loss in the supply chain, and **Lidl** solely on food waste at the consumer level (Ahold Delhaize, 2019; Lidl België, 2022e).

this counts

**Delhaize** is the only supermarket with a clear action plan on food loss in 2022, (Delhaize België, 2022e). This action plan includes measurable targets and clear definitions. Delhaize however, does not mention food waste, i.e. at the supermarket and consumer stage.

**Delhaize** collaborates with the World Resources institute and the Food Waste Coalition of Action to set up their targets. Although Delhaize did not mention whether its reports were checked by an independent third party, this collaboration is considered to be a good practice.

good step

**Aldi** published an action plan against food waste in April 2021 (Aldi Nord, 2021). They report on concrete interventions both for the supply chain as well as the consumer level, and refer to national and international interventions. Although Aldi provided very clear definitions (based on Moerman's Ladder), the report did not include measurable targets. The descriptions of the reported actions were also not always clear and could have been reported on in more detail.

good step

**Lidl** has an action plan for food waste, including clear targets and reporting (Lidl België, 2022e). However, the plan misses a clear definition of food waste. **Lidl** mentions that it will expand their work terrain on food waste and include food waste in the supply chain in the near future (Lidl België & Luxemburg, 2022).

good step

**Colruyt** undertakes a number of interventions to reduce food loss and reports multiple numbers, e.g. annual reporting of the amount of donations going to social institutions, clear numbers on annual food loss (Colruyt, 2022i; 2022c). However, Colruyt does not set concrete targets on food loss in the supply chain or formulates clear definitions of food waste.

good step

**Carrefour** published an action plan (albeit at group level) with concrete interventions aimed at reducing both food loss in the supply chain and food waste at the consumer stage (Carrefour Group, 2022c). However, the report explicitly states that measures listed in this 2020 action plan are not applicable to Belgium. Furthermore, whereas there are clear targets to reduce food waste by 50 per cent by 2025 compared to 2016, clear definitions of 'food waste' or 'supermarket food waste'/'in store food waste' are lacking. No estimation of a third party organisation is included of estimated food loss and waste, neither is an assessment included by an independent third party of actions the supermarket should prioritise.

good step

Although concrete action plans are lacking (apart from Delhaize), there are noteworthy interventions that have the potential to evolve into structural policy. One example involves providing meal boxes with damaged or nearly expired produce to fight food waste, like 'Good taste, zero waste' at **Lidl** (Lidl België, 2022e) and the 'Zero waste box' of **Carrefour** (Carrefour België, 2022d). Another interesting initiative concerns 'food recycling', in which products are processed based on food waste. Examples include 'From waste to taste soup' and 'Sapjes' by **Delhaize** (Delhaize België, 2022b), and 'enVie soep' by **Colruyt** (Colruyt, 2022i). Not only is this a convenient approach for customers, it also involves other chain actors. All supermarkets also donate food waste to the food banks (Lidl België & Luxemburg, 2021; Aldi België, 2022b; Colruyt, 2022k; Delhaize België, 2022e; Carrefour België, 2022a).

## What do supermarkets say about food loss and food waste?

*"We werken in België, Denemarken, Duitsland, Nederland en Spanje samen met afvalverwijderingsbedrijven die onze organische resten uit de winkels recycleren in biogasinstallaties voor de productie van milieuvriendelijke energie. De fermentatiesubstraten worden ook gebruikt als meststof in de landbouw en als dierenvoeding en dragen zo bij tot de nieuwe productie van levensmiddelen.".*

Aldi Nord, 2021.

*"The recently launched 'Zero Waste Box', is currently in a testing phase in Carrefour Hypermarkets of Mont-Saint-Jean, Waterloo and Kraainem, and in Carrefour Markets of Edegem, Etterbeek and Elsene (Molière)".*

Carrefour België, 2022d

"Bij Colruyt Group beperken we de afvalstromen tot een minimum. Voedingsproducten proberen we maximaal te verkopen, overschotten schenken we weg of hergebruiken we. Ook bij materialen zetten we in op een maximale recycling rate."

Colruyt, 2022e

"3 pronged approach: 1) Reduce food waste in our operations, including stores, warehouses and transport; 2) Donate surplus food to food banks and charities; 3) Reuse food no longer suitable for human consumption to other recycling methods, to prevent it from going to landfill."

Delhaize België, 2022

"Ons strijdplan tegen voedselverspilling? Simpel: door een steeds efficiëntere logistiek én door de bestelprocessen te optimaliseren. Voor de producten die dan toch nog in onze winkelrekken blijven liggen, zijn we sinds 2020 gestart met Good Taste, Zero Waste. Producten die nog moeilijk verkocht raken omdat de vervaldatum dezelfde dag is of omdat de verpakkingen beschadigd zijn, bieden we aan een bodemprijs aan."

Lidl België, 2022e

**Spotted on-site: Food loss and food waste**


*Figure 26. Products with a short shelf life differentiated by a label, within the product category (Carrefour, Lidl).*


*Figure 27. Products with a short shelf life gathered in a single, visible spot, accompanied by point-of-sale materials (Aldi, Carrefour, Lidl).*

## Spotted on-site: Food loss and food waste

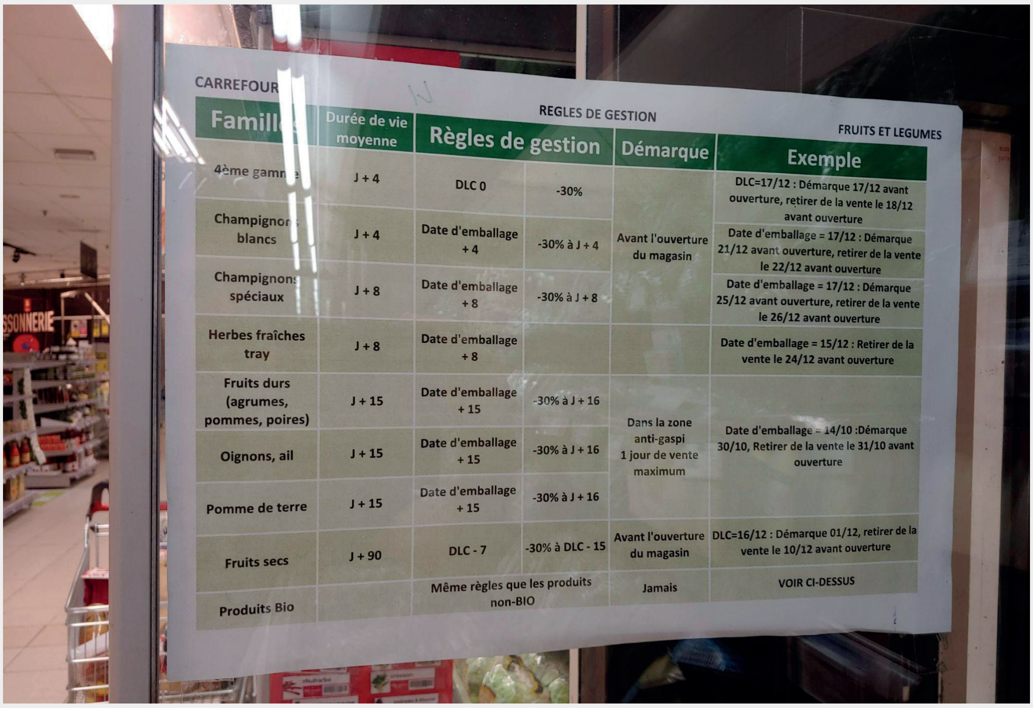



*Figure 28. An information sheet explaining the longevity of different products (Carrefour).*

## How does this count in the ranking?

In regard to food waste, Delhaize performs best, followed by Aldi, Carrefour, Colruyt and lastly Lidl.


*Figure 29. Total performance of the supermarkt with regards to the topic 'food waste'. The bar 'sum of best practices' shows the sum of current best practices found, and shows which progress supermarkets can easily make by learning from one another.* *See appendix 1 for details on the scoring →*

# Appendices

# Appendices

APPENDIX 1

# Points and scoring

## Overview of scoring

### Scores per topic

| | Protein transition | Sustainable agriculture | Food waste | Total |
|---|---|---|---|---|
| **Aldi** | 6,1% | 17,4% | 14,3% | 11,7% |
| **Carrefour** | 2,6% | 17,2% | 14,3% | 10,0% |
| **Colruyt** | 8,9% | 13,1% | 14,3% | 11,3% |
| **Delhaize** | 13,2% | 8,9% | 21,4% | 12,4% |
| **Lidl** | 5,6% | 27,0% | 7,1% | 14,6% |
| Weighting | 4 | 3,5 | 1 | |

*Figure 31. Scores per issue. The final score (total) is the weighted average of the scores.*

### Scaled scores per indicator

| | Target plant-based protein | Percentage vegetarian ready-meals | Protein rich promotions | Portion size meat | Plant-based nudging | Reporting on origin, transport, cultivation | Sustainable agriculture in assortment | Deforestation free soy | Palmoil Scorecard | Deforestation free cocoa | Fighting food waste | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **EN-1.1.1** | **EN-1.2.1** | **EN-1.3.1** | **EN-1.3.2** | **EN-1.3.3** | **EN-2.1.1** | **EN-2.2.1** | **EN-2.3.1** | **EN-2.3.2** | **EN-2.3.3** | **EN-3.1.1** | **Total** |
| **Aldi** | 5,0% | 0,0% | 11,3% | 16,4% | 0,0% | 21,5% | 0,0% | 9,6% | 32,7% | 36,7% | 14,3% | 11,7% |
| **Carrefour** | 5,0% | 10,9% | 0,0% | 0,0% | 0,0% | 5,2% | 25,2% | 6,4% | 53,4% | 0,0% | 14,3% | 10,0% |
| **Colruyt** | 5,0% | 10,6% | 14,6% | 21,7% | 0,0% | 3,0% | 21,8% | 9,6% | 22,9% | 9,4% | 14,3% | 11,3% |
| **Delhaize** | 5,0% | 17,5% | 17,5% | 42,9% | 0,0% | 4,5% | 21,8% | 1,6% | 0,0% | 7,9% | 21,4% | 12,4% |
| **Lidl** | 5,0% | 14,9% | 8,1% | 4,2% | 0,0% | 26,5% | 18,2% | 36,8% | 34,9% | 28,2% | 7,1% | 14,6% |
| *Weight* | 1 | 0,5 | 1 | 0,5 | 1 | 1 | 1 | 0,5 | 0,5 | 0,5 | 1 | |
| *Research area* | D | A | F | A | I | D | A | D | D | D | D | |
| *Topic* | EN-1 | EN-1 | EN-1 | EN-1 | EN-1 | EN-2 | EN-2 | EN-2 | EN-2 | EN-2 | EN-3 | |

*Figure 32. Scaled scores per indicator. The total is the weighted average of the scores. The research areas stand for: D = goals, F= promotion folder, A = assortment, I= in store*
The topics mean: EN-1 = protein transition, EN-2= sustainable agriculture EN-3 = Food waste.

## Clarifications with regards to the points/scoring

**Ready-to-eat-meals**

In this indicator we only included meals and excluded side-dishes and side-salad. We did this by only including ready-to-eat meals with a portion size of at least 350 grams.
With regard to Belgian meals we included all meals that consist of potatoes, vegetables, a protein component and typical Belgian meals as 'waterzooi', 'stoemp', 'coq au vin' including a starch component.

**Palm oil**

Using the published methodology the impact of palm-oil was dominant in the total scoring on the topic of sustainable agriculture. For this reason, after discussion with the Scientific Council, the lower scaling boundary has been changed from 0 to a flexible lower boundary. This means that the supermarket with the worst performance will receive 0 points. Following this change, the lower scaling boundary thus becomes 11.52, and the upper boundary stays 24 (the maximum number of points you can receive).

**Food waste**

Using the published methodology resulted in not rewarding supermarkets for the good steps they are already taking. For this reason, after discussion with the Scientific Council, half of the points were rewarded for level 1 if a supermarket only mentions interventions in one of the two areas (thus, only food waste or only food loss).
The same has been done for level 2. Thus, a supermarket with a clear action plan, including the three earlier mentioned elements on one of the two levels, is rewarded half of the points .

APPENDIX 2

# Private label factor

A supermarket is responsible for its entire range. However, in practice, supermarkets sometimes only provide information about private label products. In order to make this information mutually comparable, it was decided in consultation with the Scientific Council to apply *a private label factor*. If a supermarket only reports on private labels on a particular topic, the points for that topic are multiplied by the private label factor. The private label factor depends on the share of private label products in the total range according to figure 33.

If a supermarket itself reports the share of private label products from its entire assortment, the private label factor is equal to this share. In other cases, the private label factor is estimated with use of the Questionmark product database. See figure 34.

| % Private label | Private label factor |
|---|---|
| 0% - <30% | 0.2 |
| ≥30% - <60% | 0.4 |
| ≥60% - 100% | 0.6 |

*Figure 33. Private label factor for percentages of private label in total food assortment.*

| Supermarket | % Private label | Source | Private label factor |
|---|---|---|---|
| Aldi | 90% | (Aldi België, 2021b) | 0.9 |
| Carrefour | Circa 27% | | 0.2 |
| Colruyt | Circa 30% | | 0.4 |
| Delhaize | Circa 26% | | 0.2 |
| Lidl | 80% | (Lidl België & Luxemburg, 2022) | 0.8 |

*Figure 34. Private label factor per supermarket*

APPENDIX 3

# Research method

**This APPENDIX contains a brief explanation of the research method, with the aim of making the report readable independently.**

For details on, among other things, the delineation of measurements, calculations of scores and the editing process, we refer to two documents: the Research Framework Superlijst (REF) and Comparison Criteria Superlijst Groen (REF). Both documents are available at www.superlijst.nl.

## Reach

This research investigates the following five supermarket chains in Belgium: Aldi, Carrefour, Colruyt, Lidl and Delhaize. This selection is chosen since they are the largest supermarkets in terms of market share. Together they have a market share of 84.4% (Gondola, 2021).

**Assortment**
Data on assortment, policy and promotions was collected during a period of two months, from June 16 to the final reference date of August 15, 2022.

Supermarkets with a webshop had their online assortment analysed.
Carrefour's data was collected from www.carrefour.be, Colruyt's data from www.colruyt.be (by selecting the location 'Halle'), and Delhaize's data was collected from www.delhaize.be. Products that could be found when browsing through the categories were included. Any products that were only found when searching for them by name were not taken into account. Products (e.g. an ingredient list or portion size) with missing information online or unlikely values (with implications on the outcome) were checked in the physical supermarket.

As Aldi and Lidl do not have product information available online, all their product information was collected by Questionmark in the physical store by photographing each product and entering the information from the packaging. Variable assortment promotions were not taken into account.

The assortment of a supermarket can differ slightly per branch. The assortment available online may also differ from physical stores. When drawing up the methodology, there was no reason to assume that these differences are material to the extent to which the supermarket as a chain contributes to a sustainable diet.

**Folders**
(bi)Weekly advertising folders in the study period were examined for primary protein offers and their impact. The research into proteins on offer was done at the level of the overarching offer.

Aldi, Delhaize and Lidl publish a weekly promotional folder. Colruyt has a biweekly action folder available via https://www.colruyt.be/nl/acties/folders. In order to compare promotions of Colruyt, the biweekly action folder was analysed, and an average score of the four folders was taken.
Carrefour has several folders with different time frames. The research included folders relevant for the Carrefour market. Two folders are relevant:

1. The biweekly folder published every even week for both the Carrefour market and hypermarket. Every page in the Carrefour folder states the validity period of the promotions.
2. An additional folder that is only valid and published every odd week.
   In order to compare the promotions of Carrefour to those of other supermarkets, we analysed the biweekly folder and we used the product count for the first week in which the folder was valid (seepoint 1 above). For the odd weeks, we analysed the separate folder that was published in the second week (see point 2 above).

## Goals and reporting

During the research period, all websites of supermarkets and where relevant, parent companies, were examined for policy information.

The investigation period for annual reports ran until April 15.

At the end of the research period, supermarkets were provided with an overview of the information gathered, giving them the option to inform us of missing information.

## Scoring

Scores and percentages in this report are in many cases rounded off for readability. When calculating averages and when calculating the score per indicator and topic, unrounded values are used. In some cases, therefore, there may be a minor difference when scores are recalculated with the rounded values from this report.

## Data quality

During the research for Superlist we have taken the greatest care to the quality of the data used. Data collection at Questionmark is largely automated. Per indicator, checks are made to ensure completeness and correctness.

**Assortment**
For indicators EN-1.2.1, EN-1.3.2 and EN-2.2.1, the score was checked based on the products in the webshop of the physical store (Were products missing? Is there a product with or without a certification? Do we have all ingredients lists of ready-to-eat meals in order to determine protein types present?). After these controls, another person did the final quality check by means of a sample.

**Folders**
For indicator EN-1.2.1, the entry of the folders and the data checks were done by two different people respectively. Afterwards, a final data review was carried out by sampling. The score was verified by a different person than the one who calculated it.

At the end of the research period, supermarkets were provided with an overview of the information gathered, giving them the option to supplement us with missing information.

APPENDIX 4

# Relevant certificates

Several of the indicators of this methodology use certifications to measure (an aspect of) sustainability. However,the certifications that are in use today have varying degrees of control, and not all of them have distinctive environmental requirements. For this research, we used a selection of certifications as shown in the table below.
More information on the background of the selection can be found in the published research methodology (Questionmark, 2022)

| Keurmerk | Fish | Meat | Dairy | Eggs | Vegetables | Fruit | Wine | Coffee | Tea | Cocoa |
|---|---|---|---|---|---|---|---|---|---|---|
| ASC | ✓ | | | | | | | | | |
| Better life Label - 1 star | | – | ✓ | – | | | | | | |
| Demeter | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | | | |
| EKO | | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| EU organic | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Fair for Life | | | | | ✓ | ✓ | – | ✓ | ✓ | ✓ |
| Fairtrade | | | | | | | | | | ✓ |
| GGN Certified Aquaculture | ✓ | | | | | | | | | |
| KRAV | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| MSC | ✓ | | | | | | | | | |
| Naturland Aquakultur | ✓ | | | | | | | | | |
| On the way to PlanetProof | | | ✓ | ✓ | ✓ | ✓ | | | | |
| Rainforest Alliance | | | | | ✓ | ✓ | | ✓ | ✓ | ✓ |
| UTZ | | | | | | | | ✓ | ✓ | ✓ |
| Soil Association | ✓ | | | | | | | | | |

*Figure 35. Certifications accepted for this research. All combinations of certifications and product groups marked with '✓' are accepted; when there is a '–' the certification does have criteria for the product category, but these are not strict enough for us to be able to accept them.*

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# Recommendations for all supermarkets

Belgian supermarkets perform differently across the researched indicators, pointing to learning opportunities from one another. Nevertheless, a great number of recommendations are applicable to the entire Belgian supermarket sector. Therefore, the following recommendations should be taken into account by every Belgian supermarket.

## 1. PROTEIN TRANSITION

- **Develop and publish an integrated action plan for the protein transition with clear targets.** This action plan should include the following elements:
  - Formulate a vision with concrete objectives on the protein transition, in terms of sales and revenues, which will lead to a dedicated focus in the whole supermarket policy.
  - Give a description of the current state and develop a roadmap (incl. timeline and ambitious, measurable targets) towards the desired vision.
  - Evaluate progress annually and communicate this progress transparently. Make this data accessible for the general public. Make the lessons learned explicit and formulate activities based on this evaluation.

- **Actions that could be a valuable element of the integrated action for the protein transition:**
  - Place the protein transition **more in the centre of the procurement policy**. The evaluation of the current plant-based assortment is hereby a crucial starting point in order to effectively expand and optimise this.
  - **Reduce the share of ready-to-eat meals containing animal proteins** in favour of the ones containing plant-based proteins.
  - **Reduce the portion size of animal-based proteins** and align it with the recommendations of the Voedingsdriehoek.
  - **Reduce promotions on animal-based products**, in favour of plant-based products.
  - **Increase evidence-based interventions in the physical environment of the supermarket.** Supermarkets should implement more in-store interventions (availability of products based on plant-based protein, including product variety and the amount of shelf space allocated to these products and the presentation of products such as visual prominence, promotional signage). The protein transition should be implemented in supermarket strategies (incl. the product presentation

decisions) that supermarkets use to effectively market their products to consumers. We point out the role retail can play in supporting consumers in their alternative protein product choices.
- **Increase evidence-based interventions in communication strategies of the supermarket.** There is a need for clear descriptions of these communication interventions and it is crucial that different types of customers are targeted. We highlight the importance of long-term interventions, both online and offline.
- **Engage other supply chain players in protein transition interventions**, to set out common goals and achieve more impact together instead of deflecting responsibility.

## 2. SUSTAINABLE AGRICULTURE

- **Report on the share of sales of certified products.** Supermarkets should report on the share of sales and not share of assortment, in order to be transparent on the contribution to sustainable consumption.

- **Be transparent on the origin, cultivation method and transport method.** Supermarkets should be more transparent about their products, e.g. by publishing a list of suppliers, reporting on the share of freight/road transport for specific product types, etc.

- **Develop a concrete action plan for mitigating deforestation risks.** all supermarkets should:
  - **implement a deforestation and land-conversion free purchasing policy**, preparing for and aligning with EU due diligence legislation.
  - **publish an action plan**, including a clear definition, targets and interventions for soy, palm-oil and cocoa. Supermarkets should report annually on the progress.
  - **engage suppliers in deforestation interventions**, not only to increase traceability (which is low in general at retail level), but also to set out common goals and achieve more impact together instead of deflecting responsibility.

- **Include non-private label products in policies against deforestation.** Supermarkets should not limit their policy to their own private labels with regard to deforestation, but also request sustainable sourcing of suppliers for non-private label products.

- **Do not limit anti-deforestation policies to agroforestry or reforestation.** Supermarkets develop strategies investing in agroforestry or reforestation, which are necessary and impactful. However, these do not necessarily have an impact on the deforestation rate and are therefore complementary policy actions that can never replace deforestation policies.

- **Soy: Align anti-deforestation efforts with the protein transition.** Supermarkets should align efforts of deforestation with protein transition actions. It is inconsistent when supermarkets make efforts for more sustainable soy sourcing without simultaneously working on the protein transition.

- **Palm oil: Formulate stricter and more ambitious commitments on physical traceability.** Supermarkets should implement more robust commitments to only source palm oil that is verifiably free of deforestation and ecosystem conversion, and respects human rights. Supermarkets can make a public time-bound commitment to buy only RSPO and (ideally) POIG -verified palm oil. In addition, supermarkets should also drive supplier accountability by only sourcing from suppliers that share the same ambition and can ensure full traceability and transparency.

## 3. FOOD WASTE

- **Use a common, transparent definition on food waste.** This would make it easier to track progress. A sound definition of food waste should contain the following elements:
  - Unit of measurement: the supermarket measures food loss by weight (not as a percentage). Optionally you could convert this to monetary value (euro);
  - Data accuracy: report whether the figures are based on estimates, measurements, checkout data or counts.
  - Categorization: use Moerman's ladder.
  - Periodicity of measurements: specify the interval of the data collection.
  - Scope: specify which measurable aspects of food loss are taken into account.
  - Hidden food waste: returned fruit/vegetables, promotions, etc.

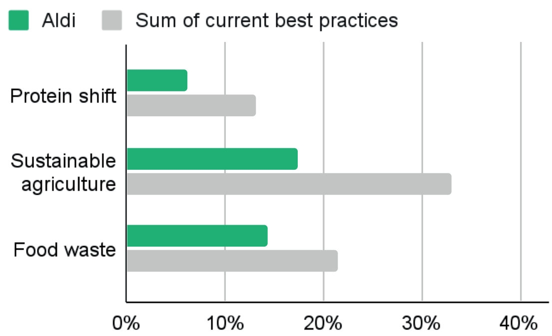
- **Develop an integrated action plan on food waste.** Supermarkets should:
  - Elaborate an action plan for food waste that goes beyond reporting of what is currently being done. The action plan should contain measurable targets (formulated as % reduction in food waste) and a concrete roadmap of actions, in line with the food waste hierarchy.
  - Report on these actions and targets.
  - Report on the supermarkets efforts to involve other supply chain actors (which they impact indirectly).

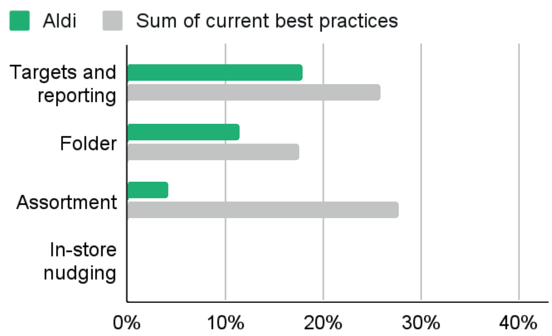
- **Be ambitious and innovative in your efforts to reduce food waste.** Prevention is a first step in the reduction of food waste, followed by redistributions and valorisation inside streams. Supermarkets should implement a mix of actions: short-term actions that are easily implementable and generate a direct impact (e.g. selling products based on food surpluses), as well as long-term solutions with more impact (e.g. large preventative action, involving supply chain actors to avoid food loss at the source, aligning demand and supply). Some pioneering supermarkets communicate data on food loss to their suppliers so they can adjust their operations to a shifting demand.

- **Report more clearly on food waste ambitions.** Reports and action plans of supermarkets on food waste are often hard to find. Retailers should increase the accessibility of their ambitions, KPI's and reporting on their websites.

# Aldi

Generally, Aldi performs quite well in regard to their policy, but does sufficiently implement it in its in-store assortment. Overall, Aldi shows commitment to reducing food waste and shifting to a more sustainable assortment. With regard to the protein transition, Aldi lags behind on most researched indicators. For instance, Aldi does not have vegan options for any types of researched ready-to-eat meals. Aldi is taking several steps to fight deforestation related to soy, palm oil and cocoa but still has much opportunity to improve their efforts in and outside of its supply chain.




## Current efforts of Aldi

**Targets and reporting**
Aldi is improving its transparency by publishing their key figures annually, including figures on sustainable certificates for certain product types (e.g. fish products).
Aldi, however, still has many challenges with regard to setting clear targets and reporting, e.g. related to the protein transition, their cocoa supply chain and fighting food waste.

**Protein transition**
Aldi signed the Green Deal for the protein transition. However, this is not translated in neither its policy nor its assortment and their promotional folders: vegan meals were not available for any of the researched ready-to-eat meals, and approximately 70% of the protein rich products included in the promotion folders are based on animal protein. It should be noted that extra large portion sizes (> 150g) in ready-made meats are uncommon.

**Sustainable agriculture**
Aldi performs quite average on this topic. Aldi mainly performs well on its transparency and less on practical indicators . Aldi is taking good steps by being transparent about the percentage of certified assortment, e.g by reporting on the share of private label organic products and the share of MSC/ASC or organic fish. However, the in store assortment was not in line with policy. For instance, 14 out of 25 sampled product types did not have a certified option, thus not giving the customer the option to buy a sustainable product.

**Fighting deforestation**
Aldi is starting to take steps to fight deforestation related to soy, palm oil and cocoa. Aldi's policy on cocoa was the most detailed of all supermarkets. Aldi is the sole supermarket reporting on the supply chain

system used (mass balance). In addition, all private label cocoa is certified by one of the following accepted certificates: UTZ, Rainforest Alliance or Fairtrade.
Aldi's Policy on soy was more limited, including only a cut-off (01/01/2020) and a deforestation- and conversion free target date (31/12/2030). With regard to palm oil, Aldi takes more steps than most other researched supermarkets, mostly due to their efforts outside their own supply chain. Nevertheless, Aldi still has a long way to go in being transparent and developing a concrete action plan.

**Food waste**
Aldi is taking several concrete measures aimed at reducing food waste in both the supply chain and at the consumer stage. Aldi is the only supermarket with a concrete definition of food waste, using Moerman's ladder. Concrete targets with (annual) reporting were, however, missing.

## Recommendations for Aldi

**Targets and reporting**
- Aldi could report on the shares of sale instead of the shares of assortment in order to estimate the actual impact of the numbers provided.
- Aldi could publish more on a national or supermarket level, instead of reporting mainly on a group level.

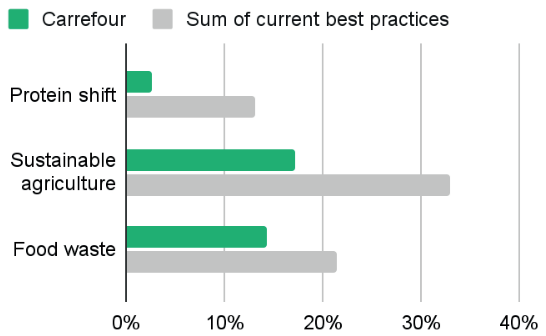
**Protein transition**
- Aldi could start with reporting the current ratio of protein sold and setting a clear target on this.
- Aldi could include vegan alternatives in (some) ready-to-eat meal types.
- Aldi could decrease the share of ready-made meats with a large portion size (portion size > 100g) and increasing the share of ready-made meats with a small/medium portion size (≤ 100g).
- Aldi could increase the share of protein rich plant-based products in the promotional folders.

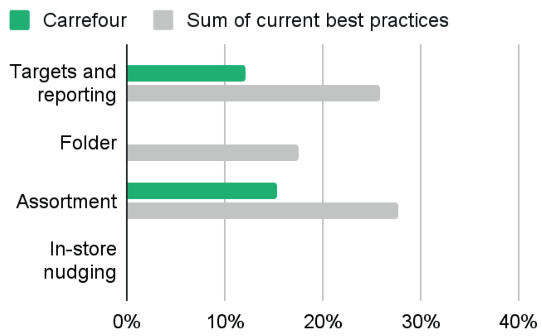
**Sustainable agriculture (incl. deforestation)**
- Aldi could expand their reporting on the origin of products by including other countries than only Belgium.
- Aldi could increase the share of product types with a certified option. Ideally, Aldi could implement fully certified product types, as such, placing the responsibility of sustainable sales on the supermarket, as Lidl is already doing for their black tea.
- With regard to soy, Aldi could start with only purchasing soy with a relevant environmental certificate. Additionally, Aldi could be more transparent concerning the origin of the sourced soy and an action plan with clear targets and regular reporting could be implemented.
- Aldi could expect its suppliers of palm oil to have a commitment to sourcing deforestation- and conversion-free.

**Food waste**
- Aldi could include concrete targets for reducing food waste in both the supply chain and in the consumer stage in its action plan. Additionally, regular reporting - e.g. annually - could be implemented, to increase their transparency.

# Carrefour

Carrefour has the overall lowest total score of all supermarkets. Generally, policy including clear goals and reporting is lacking for all researched topics. Overall, Carrefour stays behind on the topics of the protein transition and food waste. Carrefour also falls behind on indicators investigating their assortment. There is one exception to this: Carrefour mostly gives their customers the choice to buy sustainably. With regard to the topic of sustainable agriculture, Carrefour performs average compared to the other supermarkets.




## Current efforts of Carrefour

**Targets and reporting**
Carrefour often reports on a high level or without clear definitions. Targets generally focus on private label products, not on the total assortment. Additionally, Carrefour is often unclear about the scope of their targets. For instance, 'first price' or 'no names' products are excluded, without reporting on the share of these products in the total product sales. Regular reporting is often lacking and only done on a group level.

**Protein transition**
Carrefour seems to recognise its own role in the protein transition and has signed the Flemish Green Deal. The supermarket has reports on providing a plant-based alternative for every type of dairy or meat product, however, they do not specify what is meant by 'type of product'. Concrete goals and measures that go beyond selling more meat substitutes are not yet or not clearly described. Carrefour does not report on the current ratio of plant-based versus animal-based protein products sold. Carrefour also does not provide a plant-based alternative for 'Belgian meals', 'meal salads' and 'quiches'. Additionally, more than 65% of the sampled ready-to-eat meals contained animal proteins derived from meat or fish. Furthermore, approximately four out of five of the sampled ready-made meat products had a large or extra large portion size (> 100g/ portion).

**Sustainable agriculture**
Carrefour does not report systematically on the transport or certification of the sold product categories in scope. However, Carrefour communicates that 100 per cent of their private label eggs and milk have a Belgian origin, as well as 92 per cent of the meat. Additionally, certified fish was reported on in a detailed manner.
Out of the 26 sampled product types where we checked if a sustainable choice was

available, only three product types did not have a certified sustainable option. Thus, the responsibility for buying sustainably is placed on the customers, but they do have a sustainable option in most cases.

**Fighting deforestation**

Carrefour is starting to take steps to fight deforestation related to soy, palm oil and cocoa, but has many important steps to take.
With regard to fighting deforestation related to soy in feed, Carrefour for instance has an action plan including a cut-off date (01/01/2020) and is starting the mapping of its supply chain. Carrefour also announces to include deforestation- requirements in its purchasing conditions. Carrefour does not know the exact origin of soy and mentions that it does not know the exact risk of deforestation related to their soy. They also only report on a group level.
With regard to palm oil, Carrefour is taking more steps than the other researched supermarkets, mostly due to their efforts outside their own supply chain.
With regard to fighting deforestation in the supply chain of their cocoa, Carrefour stays behind compared to the other supermarkets. Carrefour is the only supermarket that has not formulated a deforestation-free target and does not report on the percentage of cocoa certified with a relevant environmental certificate.

**Food Waste**

Carrefour Group is taking several concrete measures aimed at reducing food waste in both the supply chain and at the consumer stage. They have also set the goal of halving food waste by 2025 compared to 2016, but remarkably, explicitly exclude Belgium in their reporting.

## Recommendations for Carrefour

**Targets and reporting**

- Carrefour could report on the shares of sales instead of the shares of assortment in order to estimate the actual impact of the numbers provided.
- Carrefour could publish more on a national or supermarket level, instead of reporting mainly on a group level. As such, overall transparency on policy will improve.

**Protein transition**

- Carrefour could improve their policy on the protein transition. For instance by reporting the current ratio of animal versus plant-based protein sold and setting clear targets.
- Carrefour could increase the assortment of vegan and vegetarian ready-to-eat meals.
- Carrefour could decrease the share of (extra) large (>100g) portion ready-made meats.
- Carrefour could increase the share of protein rich plant-based products in the promotion folders.

**Sustainable agriculture (incl. deforestation)**

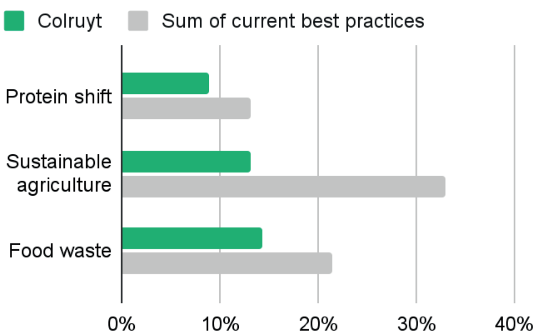
- Carrefour could expand their policy and reporting to their entire assortment (cf. share of certified fish), instead of solely on private label products.
- Carrefour could provide a certified alternative for all product types. Ideally, Carrefour could start with only offering certified products for a couple of product categories, e.g. chocolate bars
- Carrefour could increase their reporting on the share of certified products as well as increase transparency on the transport and cultivation method of products.
- Carrefour could certify (private label) sourced soy and cocoa. Currently, no commitment is shown to decrease the risk of deforestation.

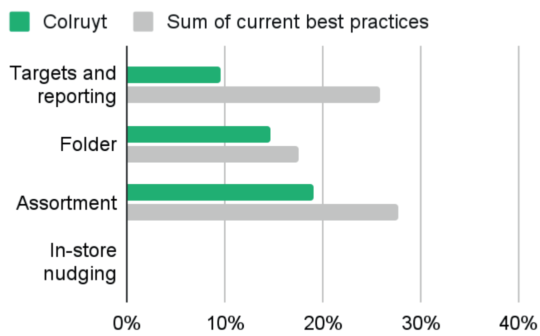
**Food waste**

- Carrefour could publish a concrete action plan (including concrete measurable targets, a clear definition and regular reporting) on reducing food waste in both the supply chain as in the consumer stage.

# Colruyt

Colruyt's performance is average when looking at their combined efforts on all topics, and still has many steps to take. Colruyt mainly stays behind in their transparency and policy, and does not set clear targets for improvement. Colruyt does, however, take good measures on the shop floor. Compared to the other researched Belgian supermarkets, Colruyt has quite a wide range of vegetarian ready-to-eat meals and most product groups have a sustainability certification. Colruyt still has many steps to take with regard to fighting deforestation related to soy, palm oil and cocoa. Colruyt is heading towards the right direction in regard to food waste but misses a concrete action plan including clear definitions.




## Current efforts of Colruyt

**Targets and reporting**
Colruyt stays behind with regard to the setting of targets and reporting. For instance, Colruyt signed the Green Deal for the protein transition, but did not publish any targets so that they can be held accountable. Colruyt also is not very transparent about the origin, transport method and certifications of their assortment, whilst transparency is the first step for improvement.

**Protein transition**
Colruyt seems to be aware of its responsibility in the protein transition. Despite not reporting the percentage of plant-based versus animal based protein in their product sales, they are taking steps in their assortment and folder. Colruyt offers at least one vegetarian option in five out of six researched ready-to-eat meals. Colruyt's promotional folders mainly contain proteins from meat or fish, but the share of animal protein originating from meat or fish is lower compared to other supermarkets. Colruyt also has the largest share of small portion sizes (≤ 80g) in the sampled ready-made meat products.

**Sustainable agriculture**
Colruyt reports that 88.69 per cent of the fish is certified by a relevant label (ASC, MSC or BIO). Nothing was published on the origin, transport method or cultivation method for other product types. Out of the 26 sampled product types where we checked if a sustainable choice was available, only one product type (melons) did not offer a certified sustainable option. Thus, the responsibility for buying sustainably is placed with the customers, but they do have a sustainable option in most cases.

**Fighting deforestation**
Colruyt is taking steps to fight deforestation related to soy, palm oil and cocoa, but still has significant progress to make. For instance Colruyt, has not published a cut-off or deforestation- and conversion-free target date for soy, palm oil and cocoa - which all of the other supermarkets already have. Colruyt seems to focus on buying only certified palm oil, soy and cocoa for their private label products, but does not look further than their own supply chain, and misses a concrete action plan to further reduce the risk of deforestation.

**Food waste**
Colruyt is taking several concrete measures aimed at reducing food waste in both the supply chain and at the consumer stage. Colruyt has also set targets to further reduce food waste in the supply chain, but clear definitions are missing.

## Recommendations for Colruyt

**Targets and reporting**
- Generally, Colruyt could report more structurally, as policy is currently lacking in clear targets and concrete actions or interventions to increase the overall sustainability of Colruyt.
- Colruyt could report on the shares of sales instead of the shares of assortment in order to estimate the actual impact of the numbers provided.
- Colruyt could publish more on a national/supermarket level, instead of reporting mainly on a group level. As such, overall transparency on policy will improve.

**Protein transition**
- Colruyt could expand its vegetarian and vegan range of ready-to-eat meals in its assortment.
- Colruyt could increase their promotions of plant-based protein in their promotion folders.
- Ready-to-eat meat portions could be adapted to contribute to the protein transition. Concretely, the share of extra large portion sizes (> 150g) could be decreased and the share of small or medium portion sizes (≤ 100g) could be increased.

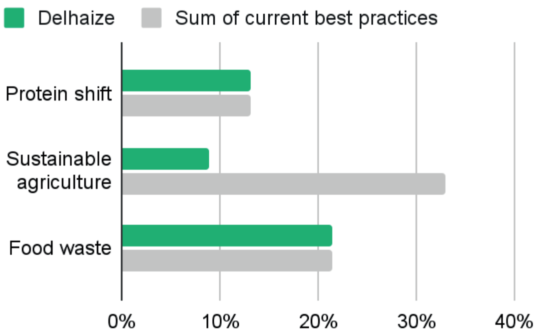
**Sustainable agriculture (incl. deforestation)**
- Colruyt could publish more on the entire assortment (cf. share of certified fish), instead of reporting on private label products alone.
- Colruyt could become more transparent and report on the origin, transport method and cultivation method of their products.
- Colruyt could provide a certified alternative for all product types. Ideally, Colruyt could start with only offering certified products for a couple of product categories, e.g. chocolate bars.
- Improve the policy on reducing the risk of deforestation. For instance, by implementing a cut-off and/ or deforestation- and conversion-free target date and by publishing concrete action plans

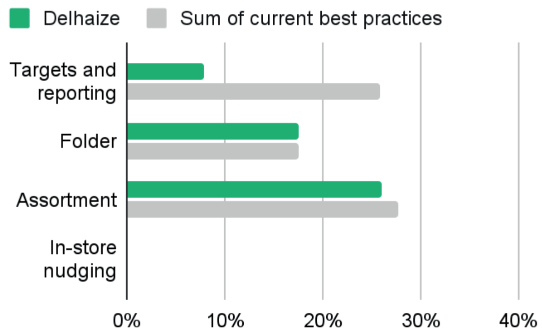
**Food waste**
- Colruyt could publish a concrete action plan to reduce food waste in both the supply chain and the customer stage, including concrete targets, actions/initiatives and reporting, and a clear definition on food waste - for example using Moerman’s ladder - to decrease food waste.

# Delhaize

## Frontrunner

Lidl and Delhaize are the overall frontrunners. Whereas Lidl takes the lead on the topic of sustainable agriculture, Delhaize takes the lead in their contributions with regard to the protein shift. Delhaize performs best on all indicators regarding the protein shift. Delhaize, however, lags behind in regard to sustainable agriculture Delhaize is the sole supermarket not to report any share of certified products, and could further improve with regard to fighting deforestation related to soy or cocoa. Concerning food waste, Delhaize is the only supermarket with a clear action plan including targets, reporting and clear definitions, but Delhaize's efforts are limited to fighting food loss in the supply chain. A clear plan to fight food waste at the consumer level is missing.




## Current efforts of Delhaize

**Targets and reporting**
Delhaize received its place as overall frontrunner primarily for their efforts on the protein transition and sustainable agriculture via their assortment and folder indicators. Clear targets are often missing, as well as reporting on the progress on these targets. However, the action plan of Delhaize concerning food waste included the most concrete targets and annual reporting.

**Protein transition**
Concrete targets related to the protein transition are missing. Delhaize is, however, the frontrunner due to their efforts related to their assortment and folders. For instance, Delhaize has the highest amount of ready-to-eat meals with only plant-based proteins, and the lowest amount of ready-to-eat meals containing meat or fish. An analysis of their promotional folders gives a similar outcome: from their protein-rich promotions, Delhaize has the second largest percentage of plant-based protein, and one of the lowest percentages of meat or fish. Delhaize also has the smallest share of large-portions of ready–made meats across all supermarkets. Both the share of extra large (24%) and small or medium (29%) portion sizes are larger compared to other supermarkets. Delhaize is currently the frontrunner on these topics, but it is important to note that the overall differences between the supermarkets are small.

**Sustainable agriculture**
Delhaize is a laggard on the topic of sustainable agriculture. Delhaize does not set clear goals and is for instance not transparent about the origin, certifications, and

transportation method of their assortment.
Delhaize is,however, the sole supermarket with at least one option labelled with a relevant certification for all sampled product types. However, Delhaize places responsibility on the customer as there are always options offered without a relevant certification.

**Fighting deforestation**
Delhaize does not have sufficient policy concerning deforestation mitigation related to soy, palm oil and cocoa. No targets are published for the certification of both soy and cocoa, nor are the current certified shares communicated. With regard to palm oil, Delhaize is taking good steps but investments outside of their own supply chain are missing.

**Food waste**
With regard to food waste, Delhaize is the only supermarket with a clear action plan including a target date, reporting and a clear definition. Delhaize's efforts are, however, limited to fighting food loss in the supply chain. A clear plan to fight food waste at the consumer level is missing.

## Recommendations for Delhaize

**Targets and reporting**
- Delhaize could report on the shares of sales instead of the shares of assortment in order to estimate the actual impact of the numbers provided.
- Delhaize could publish more on a national level, instead of reporting mainly on a group level. As such, overall transparency on policy will improve.

**Protein transition**
- Delhaize could set clear targets and a clear action plan to increase/decrease the sales of plant/animal protein could be implemented.
- Delhaize could adapt its ready-to-eat meat portions to contribute to the protein transition. More concrete, the share of extra large portion sizes (> 150g) could be decreased and the share of small or medium portion sizes (≤ 100g) could be increased.
- Delhaize could add a vegan option for Belgian meals, ready-made salads and quiches.

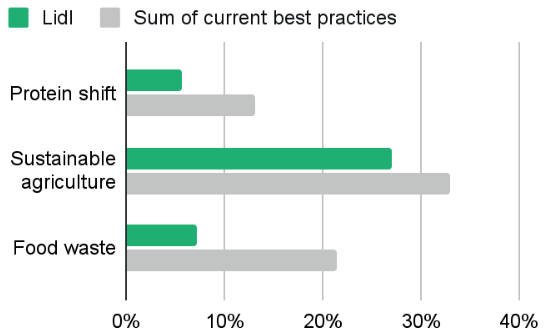
**Sustainable agriculture (incl. deforestation)**
- Delhaize could improve transparency on sustainable agriculture in its policy. For instance, reporting on the cultivation method, transport method or relevant certification for different product types or by reporting on the origin of products from other countries than Belgium.
- Delhaize could start with only offering certified products for a couple of product categories (e.g. coffee), placing the responsibility for the sale of sustainable produce on the supermarket alone.
- Delhaize could certify its sourced soy and cocoa. Membership of a roundtable such as RTRS has little impact if the soy itself is not certified. Moreover, Delhaize could be transparent on the origin of the sourced soy and cocoa, and establish an action plan to reduce the risk of deforestation.

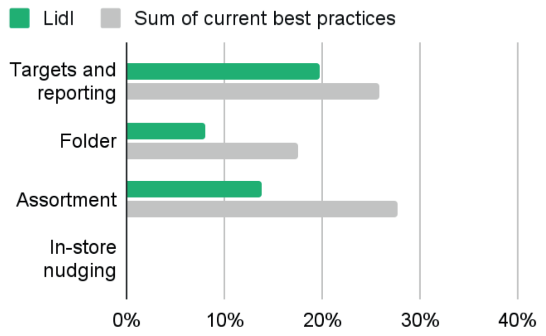
**Food waste**
- Delhaize should include clear definitions - for example using Moerman's ladder - in its action plan to reduce food waste. Additionally, interventions to tackle food waste at the consumer stage could be implemented.

# Lidl

Frontrunner

Lidl and Delhaize are the overall frontrunners. Whereas Delhaize takes the lead in their contributions to the protein shift, Lidl takes the lead on the topic of sustainable agriculture. Lidl is the frontrunner concerning the transparency in policy on origin and certification of private label products. However, this transparency does not translate in a large assortment of products with a relevant environmental certification in store. Lidl seems aware of its responsibility in the protein transition, however concrete measures and policy to support this protein transition are missing. Lidl is taking good steps in fighting deforestation related to soy, palm oil and cocoa but has plenty of room for improvement. With regard to food waste, a clear action plan aimed at reducing food waste is still missing.




## Current efforts of Lidl

**Targets and reporting**
With regard to targets and reporting, Lidl is doing better than most other researched supermarkets in regard to sustainable agriculture. Lidl bi-annually publishes a sustainability report that includes all previous and new targets, the progress made on these targets and the current situation. However, concrete policy on the protein transition and food waste is missing.

**Protein transition**
Lidl does not have clear targets concerning the protein transition in its policy. However, Lidl did mention that it will develop a clear definition of plant-based and animal proteins by 2025 and will use this to monitor their contributions to the protein shift.
In practice, Lidl does not seem to do much to support the protein transition. Lidl for instance does not have a vegan option available for most researched ready-to- eat meals. Approximately 25% of their assortment of ready-to-eat meats (burgers, sausages and schnitzels) have an extra large portion size (>150g). This is a larger percentage than any other researched supermarket. When looking at the promotions we can draw a similar conclusion: of all the protein rich promotions almost 4 out of 5 are promotions for meat or fish. This is higher than all other researched supermarkets.

**Sustainable agriculture**
Lidl is a frontrunner on the topic of sustainable agriculture, but mainly so due to their transparency in their reporting. Lidl, for many product types, does not offer the customer the choice to buy a sustainably certified product: of the

27 product types sampled, 14 did not have a certified option. Lidl is, however, the only supermarket with a fully certified product type, namely black tea.

**Fighting deforestation**
Lidl is taking good steps to fight deforestation. Lidl is the frontrunner concerning their policy on soy: 100% of the sourced private label soy is RTRS certified. Furthermore, Lidl is a member of the Roundtable for Responsible Soy and established the Lidl Soy initiative. Lidl implements a cut-off date (01/01/2020), but a deforestation- and conversion-free target date is missing.
On palm oil, Lidl is the only supermarket that expects suppliers to have a commitment to sourcing deforestation-free palm oil. Lidl is, however, mainly focused on their own supply chain. With regard to cocoa. Lidl can do a lot more. It is good that all private label cocoa is certified by a relevant standard, and a cut-off date is implemented. A clear action plan on cocoa and transparency about the supply chain is, however, missing.

**Food waste**
Lidl stays behind in their actions regarding food waste. Interesting initiatives on the consumer level are present, such as the ‘good taste, zero waste’ project. However, concrete actions and an action plan on reducing waste in the supply chain are currently missing. It is however a good step that Lidl mentions it will expand their work terrain on fighting food waste in the supply chain in the near future.

## Recommendations for Lidl

**Targets and reporting**
- Lidl could expand their reporting and policy to include their entire assortment. Currently, most policy is applicable exclusively to private label products.

**Protein transition**
- Lidl could take the lead in their policy by doing as they promise: have a clear definition of plant-based and animal proteins developed asap and use this for monitoring and reporting.
- Lidl could decrease the number of extra large portion sizes of the processed meats, e.g. burgers and schnitzels, and increase the number of small to medium portion sizes (≤100g).
- Lidl could expand their assortment of plant-based ready-to-eat meals.

**Sustainable agriculture (incl. deforestation)**
- Lidl could increase transparency on origin, transport methods and cultivation methods.
- Lidl could better ensure the sustainability of its assortment. Oftentimes, a sustainable option is not even available, e.g. brochettes, pears, grapes, melons, etc.
- With regard to soy, Lidl could set a target date for deforestation-free soy and an action plan to further decrease the risk of deforestation, and be more transparent about their supply chain.
- Lidl could take more action to fight deforestation related to palm oil outside of its own supply chain.
- Lidl could be more transparent with regard to the supply chain system for cocoa, and develop a concrete action plan to fight deforestation related to cocoa.

**Food waste**
- Lidl could expand on their action plan to not only reduce food waste at the consumer stage, but also in the supply chain. This action plan should include measurable targets, reporting on these targets, clear definitions and concrete interventions.

Questionmark

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SUPER
LIST