

Superlist



Environment

Belgium 2026

Isolated improvements, unsustainable norm



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SUPER
LIST 

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Foreword



**Charlotte
Linnebank**

General Director
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Questionmark

Four years ago, the first Superlist Environment Belgium highlighted supermarkets' power as gatekeepers of our food system. Returning to the data in 2026, we found a stark paradox: green initiatives are rising, but the unsustainable norm remains unchanged.

We see encouraging, isolated improvements. Several retailers have drafted concrete 2030 climate roadmaps, pioneering pricing policies match plant-based alternatives with meat, and some major retailers have aligned with new European deforestation laws. Yet, these tweaks happen only at the margins. Despite the targets, absolute emissions are stagnant or rising, almost 9 out of 10 promotions still push meat, and compliance rarely goes beyond the legal minimum. The 2026 data proves that small adjustments cannot guarantee outcomes that keep us within our planetary boundaries. We must stop treating sustainability as an add-on. Progress requires a fundamental, systemic change - a complete rewiring of the default choice to establish a new norm.

I am grateful to our partner Rikolto and the supporting organisations Bond Beter Leefmilieu, Bos+, écoconso and TestAankoop for making this research possible again and for the collective effort going forward.

Supermarkets have proven they can make small changes. Now, they must scale up and structurally shift the norm.



**Thibault
Geerardyn**

Director Rikolto
Belgium

Rikolto

How do you transform an unsustainable food system? People are willing to adopt more sustainable and healthy eating habits. Farmers and food producers are willing to deliver climate-friendly and regenerative produce. We at Rikolto aim to connect the dots. Through inclusive business relations and stimulating food environments, sustainable food chains can flourish.

Supermarkets play a pivotal role in this transformation. Not only are supermarkets the single most frequented food environment for most Western Europeans, they are also powerful business partners for food producers and farmers.

Superlist shows both promising practices and untapped opportunities in how supermarkets can boost the necessary move towards sustainable food chains. Therefore, this report is an invitation for retailers and governments to help connect the dots and redraw our food system.



Collective forward ambassadors

HPast summer highlighted the urgency of tackling global environmental challenges. Wildfires destroyed vast areas of nature in Europe, while forests around the world are increasingly lost to fire. At the same time, deforestation has shown no meaningful decline since 2022. Urgent action is therefore needed more than ever. With a total market share of 80%, supermarkets can play a pivotal role. Belgian consumers want to make more sustainable food choices, yet face several barriers, including price, a lack of clear information, the continued dominance of animal-based food and limited availability of sustainable alternatives. This new Superlist research examined these barriers and shows that much work remains to create the food environment consumers need to make more sustainable choices. The retail sector needs to turn ambition into action. This study provides supermarkets with practical tools, recommendations, and concrete guidance to accelerate the transition.

INTRODUCTION

Upstream supply, downstream choice: The power of supermarkets

Supermarkets play a crucial role in daily life and are an indispensable part of modern society. With Belgians purchasing about 85 per cent of their daily food in supermarkets (1), they hold immense power over what ends up on our plates, and how it is produced. Upstream, they have the power to demand more sustainable agricultural practices from suppliers; downstream, they should encourage a sustainable diet among their customers. This combined influence and concentration in a handful of companies per country, often operating transnationally, makes supermarkets an exceptional leverage point for systemic change in the food system.

What is Superlist?

Superlist, initiated by think tank Questionmark, is an ongoing international research project and advocacy programme committed to creating a more healthy, sustainable and fair food system. Through fact-based research, Questionmark encourages retailers and governments to drive change, foster collaboration and implement appropriate regulations.

Superlist engages retailers throughout the project and aims to build trust. Our goal is to enable supermarkets to compare their efforts with competitors, learn from best practices, and provide them with concrete recommendations. By focusing on shared insights and educational learnings, Superlist inspires supermarkets to understand their impact and take the next steps toward a sustainable food system.

About Superlist Environment

This Superlist is a continuation of the first edition of Superlist Environment Belgium, published in 2022. In Superlist Environment Belgium 2026, Questionmark again compares Belgian supermarkets to assess changes in sustainability performance.

Superlist Environment 2026 focuses on four themes: mitigating climate change, protein transition, sustainable agriculture, and food waste. The supermarkets

included in this edition are Aldi, Carrefour, Colruyt, Delhaize and Lidl. This selection was chosen because they collectively represent over 80 per cent of the Belgian market (2).

For more information on how Superlist relates to the local context, see the [glossary](#).

Research methodology & data collection

The research [methodology](#) was published on 23 February 2026 (3), following consultations with supermarkets, the Scientific Council, partner Rikolto and supporting organisations Bond Beter Leefmilieu, Bos+, écoconso and TestAankoop. Any data that could be interpreted in multiple ways, and any deviations from the research method, were submitted to the Scientific Council for review (see the link to the background report for further explanation). Data was collected between 23 February 2026 and 20 April 2026.

The [background report](#) provides a complete overview of the underlying data.

Reading guide

Throughout this report, colour references are used to show how well supermarkets are performing in each specific section:

Green: supermarket is scoring well in this section.

Yellow: supermarket initiatives are not substantial enough to impact the score, but small steps in the right direction are being made.

SUMMARY SUPERLIST ENVIRONMENT BELGIUM 2026

Isolated improvements, unsustainable norm

Superlist Environment Belgium 2026 assesses how the country's five major supermarkets Aldi, Carrefour, Colruyt, Delhaize and Lidl perform on climate action, the protein transition, sustainable agriculture and food waste. The core finding reveals that despite isolated improvements like new climate roadmaps and plant-based pricing, animal-based products and conventional agriculture remain the dominant norm. Retailers hardly move beyond basic legal compliance, highlighting the urgent need for a systemic shift to align the sector with planetary boundaries.

In this edition, Lidl leads the overall ranking, followed by Delhaize, while Aldi lags furthest behind.

Superlist Environment Belgium 2026

Isolated improvements, unsustainable norm

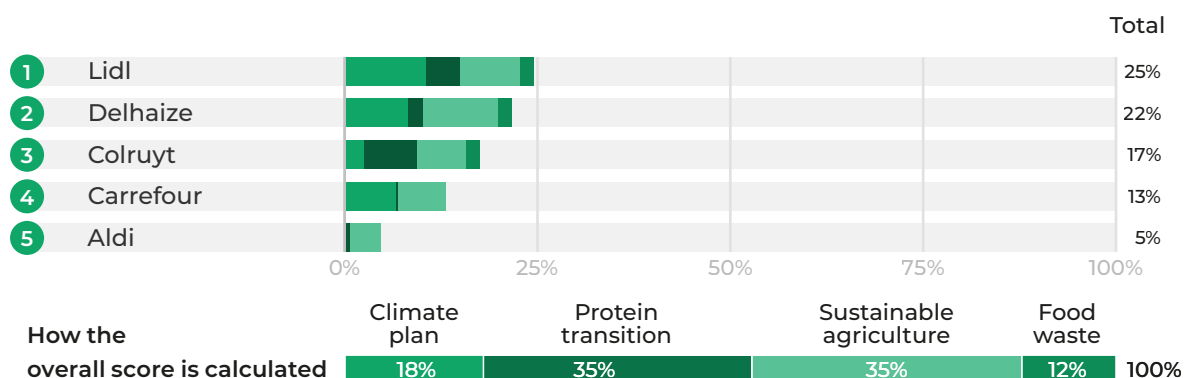


Figure 1 Ranking of supermarkets in Superlist Environment Belgium 2026: overall scores and performance across four key pillars: climate plan, protein transition, sustainable agriculture and food waste. [🔗](#)

SUMMARY SUPERLIST ENVIRONMENT BELGIUM 2026

Ambitions rising, but actual emissions are not going down

Carrefour, Delhaize and Lidl have set 2030 Scope 3 reduction targets and road-maps, while Aldi lags behind on tracking any of its emissions. However, total greenhouse gas emissions across the sector remain stagnant or are actively increasing, meaning no supermarket is currently on track to meet the 1.5°C Paris Agreement targets.

Colruyt leads the shift, yet animal-based remains the norm

Four retailers now track their protein splits and set targets (with Colruyt being the most ambitious). While Lidl introduced pricing parity for meat and their plant-based alternatives, animal-based products still heavily dominate the landscape, making up on average 86 per cent of all supermarket promotional leaflets.

Supermarkets hardly move beyond the minimum for sustainable sourcing practices

All supermarkets have committed to zero-deforestation policies to comply with the new EU Deforestation Regulation (EUDR). But there remains little transparency or efforts going beyond basic compliance. There are isolated improvements aiming to guarantee sustainable assortment choices, however Lidl is taking a step back with its organic dairy assortment.

Food waste: a blind spot in the supply chain and consumer stage

Despite its huge environmental impact, supermarkets fail to tackle food waste effectively at the supply chain or consumer stages. Concrete targets and systemic reductions in these areas remain non-existent: none of the supermarkets have a clear action plan.

Questionmark

About Superlist Environment Belgium

Superlist Environment Belgium is an initiative of think tank Questionmark, in collaboration with Rikolto and supported by Bond Beter Leefmilieu, Bos+, Écoconso and TestAankoop. This initiative is part of the broader European research program Superlist, in which Questionmark reveals and evaluates how supermarkets contribute to a healthy and sustainable food system.

CLIMATE PLAN

Ambitions rising, but emissions are not going down

KEY FINDINGS

- None of the supermarkets show a clear decline in total greenhouse gas emissions.
- All supermarkets report Scope 1, 2 and 3 greenhouse gas emissions, except for Aldi.
- Carrefour, Delhaize and Lidl have a Scope 3 emission reduction target for 2030, backed by a detailed roadmap to achieve it.

How supermarkets score on driving down emissions

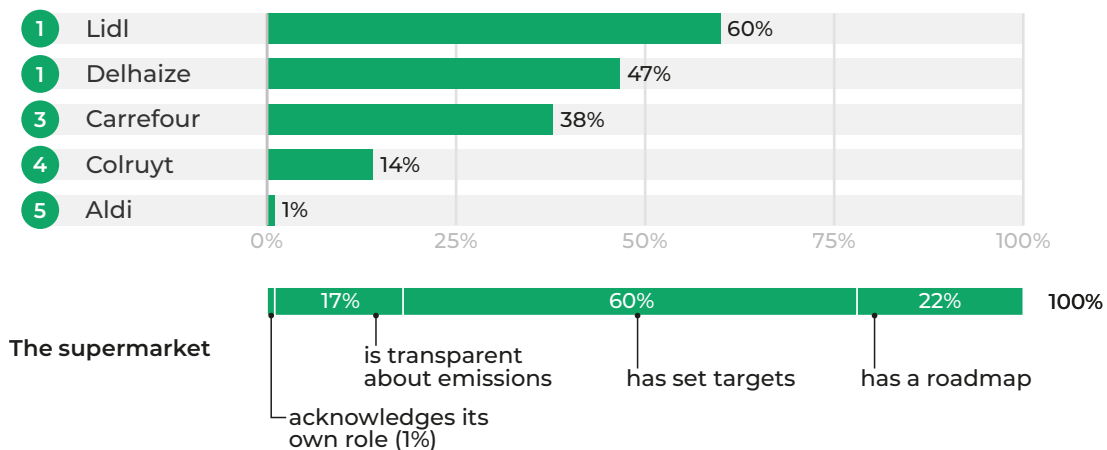


Figure 2 Subranking: supermarkets' efforts to mitigate climate change. [🔗](#)



Photo: Herpendalvallei

As critical links in the food system, supermarkets share a profound responsibility for global greenhouse gas emissions. To limit global warming to 1.5°C, they must urgently align corporate actions with the Paris Agreement through climate plans giving insight into current emissions, reduction targets, and concrete roadmaps.

None of the supermarkets show a clear decline in total greenhouse gas emissions

Total emissions are rising or stagnant across most of the sector and none of the supermarkets demonstrate a clear downward trend. Specifically, Carrefour and Lidl have recorded a clear increase in emissions, while Delhaize's total emissions rose despite a slight decrease in Scope 3 (4–6). In fact, consequently, none of the three retailers with 2030 roadmaps appear on track to meet their Scope 3 reduction targets.

Colruyt reported a Scope 3 reduction, but incomplete data regarding its baseline recalculation makes this impossible to verify (7). Furthermore, Colruyt's latest restatement shows a 29 per cent increase in the "use phase of sold products", the only category covered by its quantified reduction target.

All supermarkets report Scope 1, 2 and 3 greenhouse gas emissions, except for Aldi.

Quantifying and reporting emissions is a crucial step in developing a concrete emission reduction plan. All researched supermarkets, except Aldi, publish their current Scope 1, 2 and 3 emissions alongside the baseline emission levels from their respective target base years (4–7). **Delhaize** and **Lidl** stand out by separately reporting FLAG emissions (Forestry, Land and Agriculture) and non-FLAG emissions (industry-related) (5,6) (see text box on FLAG and non-FLAG emissions). Building on this, **Lidl** provides the highest transparency by breaking down FLAG emissions per food group: this data confirms that animal-based products generate the largest carbon footprint across all product categories, with meat and fish accounting for 31 per cent and dairy for 24 per cent (8).

However, despite methane being one of the most harmful greenhouse gases, none of the five supermarkets report their methane emissions separately (9,10). This leaves a critical portion of their supply chain impact completely obscured.

Carrefour, Delhaize and Lidl have a Scope 3 emission reduction target for 2030, backed by a detailed roadmap to achieve it.

Reducing Scope 3 emissions is key to achieving the Paris Agreement because these emissions account for about 90 per cent of a supermarket's total carbon footprint (11).

Several major retailers have set near-term targets for 2030 to reduce their Scope 3 emissions. **Carrefour**, **Delhaize** and **Lidl** have all set near-term targets for 2030 to reduce their Scope 3 FLAG-emissions (4,6,8). While their Scope 3 FLAG-targets align with the Paris Agreement, their overall Scope 3 targets, including both FLAG and non-FLAG emissions, fall short. They aim for a 32 – 39 per cent reduction, missing the required 43 per cent cut compared to 2019 levels in order to keep global warming under 1.5°C (12).

In addition to their 2030 targets, **Carrefour**, **Delhaize** and **Lidl** have published a detailed roadmap describing how they will reach their targets (4,13,8). This includes concrete measures with a quantified contribution toward the overall reduction target. A detailed roadmap is crucial because it bridges the gap between ambition and action. In addition to the roadmap to achieve its 2030 target, **Lidl** has published a roadmap for its 2050 net-zero ambition.

HOW ARE SCOPE 1, 2 AND 3 EMISSIONS CATEGORISED?

Scope 1

A company's direct emissions (e.g. emissions from refrigerants)

Scope 2

Indirect emissions from the generation of purchased energy (e.g. electricity consumption, generation of electricity not owned by the supermarket)

Scope 3

Indirect CO₂ emissions in the company's value chain, both upstream (e.g. transport of raw materials) and downstream (e.g. waste processing). Split into:

- FLAG (Forestry, Land and Agriculture): emissions from forestry, land use, and agriculture
- Non-FLAG (Energy and Industry): emissions from industrial processes

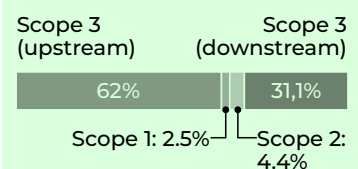


Figure 3 Overview of supermarkets' emissions categorisation (11). [\[Link\]](#)

In contrast, Aldi and Colruyt lack comprehensive Scope 3 targets. Colruyt's target covers only the use of products sold, representing only about 8 per cent of the total Scope 3 emissions (7). Additionally, Colruyt has set a target, aiming for 77 per cent of its suppliers to have emission reduction targets by 2027. However, the supermarket does not translate this into a quantified emission reduction target. Meanwhile, Aldi has no Scope 3 targets at all. Mapping these emissions is urgent, not only to identify the largest emissions sources within its supply chains, but to comply with the Corporate Sustainability Reporting Directive (CSRD (14)) mandate starting in 2027.

To effectively reduce Scope 3 emissions in value chains, supermarkets must also support their suppliers in implementing sustainable practices. While most supermarkets offer support through training and online learning tools, direct investment in supply chains and financial support for implementing sustainable practices are critical to achieving real emission reduction in the supply chain. **Delhaize** financially supports several projects in its value chains via the Delhaize Fonds (15), and indicates the emission reductions achieved through these projects. However, it remains unclear if this financial support is widely available to high-volume suppliers, or how significantly it impacts Delhaize's total emissions.

How concrete are supermarkets' climate plans?

			Aldi	Carrefour	Colruyt	Delhaize	Lidl
Reporting	Current emissions	Scope 1 and 2	✓	✓	✓	✓	✓
		Scope 3	✗	✓	✓	✓	✓
	Split current emissions	FLAG / non-FLAG	✗	✗	✓***	✓	✓
		Methane	✗	✗	✗	✓***	✗
	Baseline emissions		✗**	✓	✓	✓	✓
Target	Short term		✗	✓	✗*	✓	✓
	Long term		✗	✓	✗	✓	✓
Climate roadmap	Short term		✗	✓	✗	✓	✓
	Long term		✗	✗	✗	✗	✓

Published after data collection in latest annual report (not included in scoring)

Figure 4 Reporting, target setting, and roadmaps as part of supermarkets' climate plans. [🔗](#)

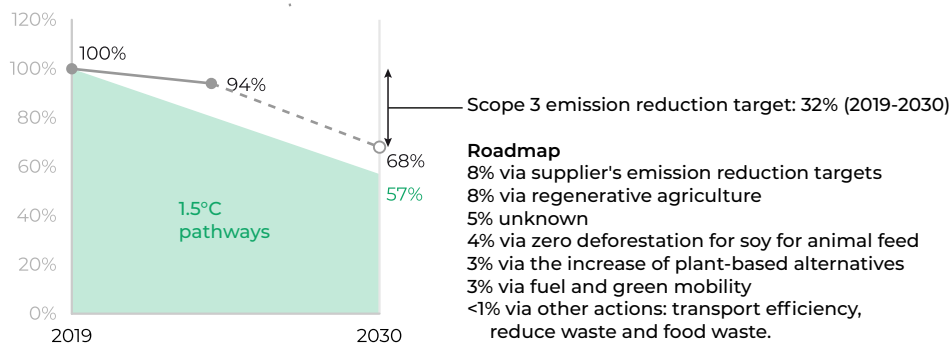
* target does not cover all of Scope 3

** no scope 3 baseline reporting

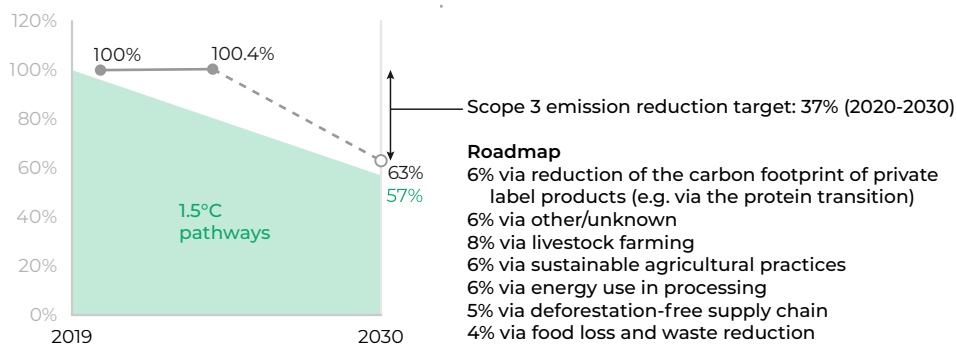
***Colruyt (FLAG/non-FLAG Scope 3 split) and Delhaize (separate methane reporting) both published after the data collection, so no points.

Supermarkets are not on track to meet Paris Agreement's ambition

Carrefour



Delhaize



Lidl

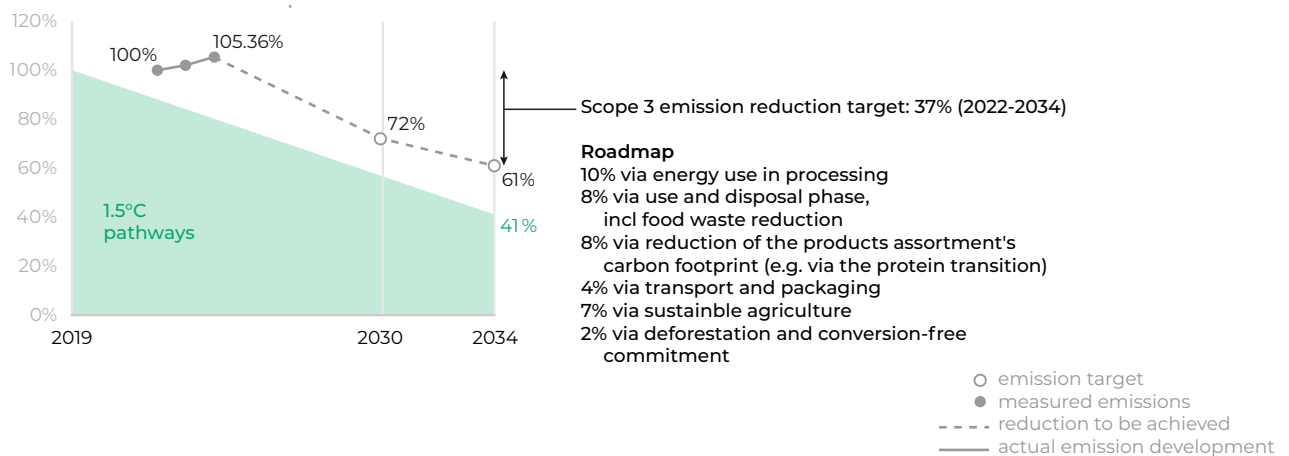


Figure 5 Emission reduction ambitions, baseline year (100%) compared to target year, and published roadmap to achieve ambitions. Aldi and Colruyt do not have published roadmaps and are therefore not shown in this figure. [\[link\]](#)

PROTEIN TRANSITION

Colruyt leads the shift, yet animal-based remains the norm

KEY FINDINGS

- Colruyt and Lidl set a protein split target to support the shift towards plant-rich diets.
- Lidl leads with plant-based nudges, but animal-based remains the norm.
- Almost nine out of 10 promotions still push animal-based products, though Colruyt leads in reducing meat promotions.

Animal-based is still the norm

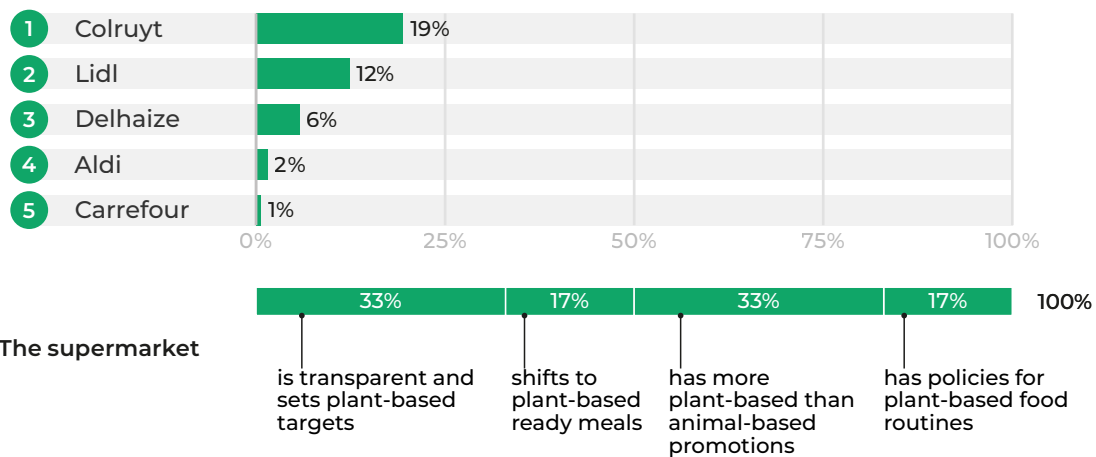


Figure 6 Supermarkets' efforts to shift to plant-rich diets. [\[Link\]](#)



The protein transition refers to a shift from animal-based to more plant-based proteins to reduce the food system's environmental footprint and promote healthier, more balanced diets (16). Shifting to plant-rich diets is necessary to reduce the negative effects of food production on the climate. Animal products account for half of all emissions from food production. Therefore, rebalancing protein sales is a key strategy for supermarkets to reduce their Scope 3 emissions. All five supermarkets are committed to stimulating plant-rich diets and have co-signed the green deal with the Flemish government.

Colruyt and Lidl set a protein split target to support the shift towards plant-rich diets.

To support the Flemish Green Deal, all retailers assessed except for Aldi, have integrated the protein transition into their core strategies. These supermarkets are reporting the share of plant-based proteins in their sales. However, comparing their progress is not possible because each retailer calculates its protein split using a different methodology. Crucially, simply expanding plant-based ranges is insufficient, an effective protein transition requires active substitution to structurally reduce absolute animal-based volumes.

Colruyt, Delhaize and Lidl have set targets to increase the share of plant-based proteins to contribute to shifting to more plant-rich diets

(see data in Figure 9). **Colruyt** holds the most ambitious target and is the only supermarket with a target in line with the Planetary Health Diet, aiming to reach 60 per cent by 2028 (7). **Delhaize** has set two targets to shift towards plant-rich diets. Yet neither can be verified against the Planetary Health Diet. Its first target is based on assortment which does not reflect consumption patterns (17), while its second target (set by the mother company, Ahold Delhaize), lacks a reported baseline and the method is unknown (18). **Lidl's** reported targets are insufficient to meet the 2050 Planetary Health Diet protein split (19).

Clear progress towards these targets is limited. Firstly, while Colruyt's ambition is noteworthy, only a single data point is available which is insufficient to determine if it is on track. Achieving a nearly 30-percentage-point shift by 2028 represents a steep trajectory that requires consistent, multi-year monitoring to confirm its feasibility. Secondly, Delhaize reports having already reached the first target, while progress on the second target remains unknown due to a missing baseline

DEFINITIONS

Plant-rich diet: dietary shift (ratio plant vs. animal) as defined by the Planetary Health Diet.

Plant-based: ingredient-origin (100% plants)

Protein-rich: Nutritional content (high protein count)

Planetary Health Diet:

Whole diet:

- 76% plant-based
- 24% animal-based

Protein-rich foods:

- 60% plant-based
- 40% animal-based

Current Belgian Diet:

- 42.6% plant-based
- 57.8% animal-based

To what extent are supermarket protein targets aligned across the sector?

Supermarket	Scope	Protein splits in 2025 (share plant-based)	Targets protein split (share plant-based)	Method used
Aldi	X	X	X	X
Carrefour*	Total sales	42%	50% in 2030	Protein Tracker (kg of protein in sales)
Colruyt	Total sales	31%	60% in 2028	Eimeet (kg of protein in sales)
Delhaize	Number of products	51%	50% in 2030	Own method (number of products in the assortment)
	Total sales	X	50% in 2030	Own method (kg of protein in sales)
Lidl**	Sales in protein-rich segment	15%	20% in 2030 60% in 2050	WWF (kg of product in sales)
	Sales in dairy segment	3%	10% in 2030	
	Total sales	X	20% increase by 2030	

Figure 7 Four out of five supermarkets started reporting their protein split and/or setting targets, however methodologies are not comparable. (20)(7)(17)(19). [🔗](#)

* Carrefour has published its protein split of the reporting year 2025 and its 2030 target after the data collection period of Superlist. Therefore, these are not taken into account in its score.

** Lidl has published its protein split of the reporting year 2025 after the data collection period of Superlist. Therefore, it is not taken into account in the score of Lidl.

measurement. Thirdly, Lidl reports minimal progress on each metric: 1.3 per cent in the protein-rich segment since 2023 and 0.3 per cent in the dairy segment since 2024 (19). Based on the reported figures, Lidl does not seem to be on track to reach its targets.

Meanwhile, Carrefour has set a target to grow its sales of plant-based proteins, but it has not set a target to reduce the sales of animal protein (4). For an effective protein transition, a structural shift is required; simply expanding the plant-based range is insufficient if absolute volumes of animal-based products do not decrease. To achieve meaningful benefits, supermarkets must implement targets that actively substitute animal proteins with plant-based alternatives, rather than just adding new products to existing shelves.

Finally, Aldi lags behind, having reported neither its protein split nor set a target to increase the share of plant-based foods in its sales.

Lidl leads with plant-based nudges, but animal-based remains the norm.

To drive a meaningful protein transition, supermarkets must actively stimulate the sales of plant-based products through assortment, promotions and strategic nudging, while simultaneously reducing meat sales through measures like smaller portion sizes.

For example, **Lidl** enforces a price parity policy to ensure plant-based alternatives are sold at the same price as their animal-based equivalents (21). The supermarket aims to encourage more consumers to replace animal products with plant-based ones. However, Lidl does not report on the effect of this policy on purchase habits of its consumers or sales volumes. Furthermore, **Lidl** places plant-based alternatives and their animal-based equivalents on the same shelves to reach consumers who are not actively looking for a more plant-rich diet (21).

Other retailers rely primarily on isolated product innovations and discounts on plant-based products. **Carrefour**, **Delhaize** and **Lidl** have introduced hybrid products to reduce meat consumption without stimulating consumers to radically alter their eating habits. These products contain both meat and plant-based ingredients such as minced meat with beef and peas (17,21,22).³ Additionally, **Delhaize** offers a standard discount on plant-based products (23). While this intervention lowers the barrier for plant-based choices, it does not directly operate as an active mechanism to reduce the consumption of animal proteins.

³ Aldi and Carrefour also offer hybrid products in their online stores, however they do not actively communicate about it in their protein strategy and it is therefore unclear whether these products are available in all stores.

Despite these encouraging steps, retailers, except Lidl, does not implement these strategies at a structural scale, tailored to reach customers who are not already actively seeking a plant-rich diet. Belgian supermarket shelves remain overwhelmingly centered on animal proteins, and large meat portions remain the default standard. This systemic stagnation is validated by data: since the Superlist Environment Belgium 2022 benchmark, there has been no significant decline in the share of pre-packaged convenience meals containing animal proteins, nor any visible reduction in oversized meat portions on store shelves. In fact, 94 per cent of the meals contain animal-based proteins and over seventy per cent of the portion sizes are large or extra large. While isolated pricing and product innovations are a step forward, animal-based products remain the dominant norm in Belgian retail.

Still over 90% of ready meals animal-based

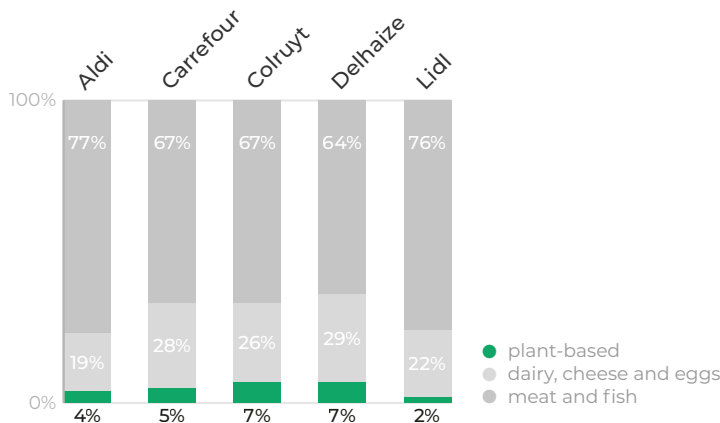


Figure 8 Composition of ready meals in 2026. [🔗](#)

Belgian meals, ready-to-eat salads and quiches are mainly animal-based

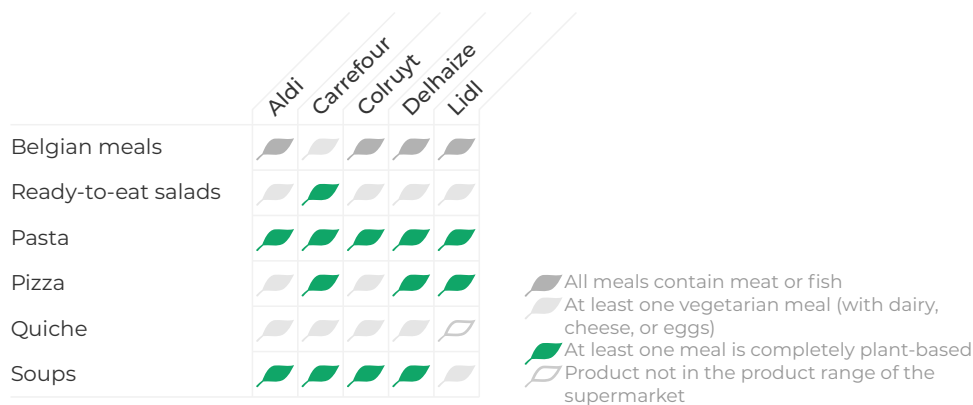


Figure 9 Protein type in the ready meals range. [🔗](#)

No significant decline of large meat portions on store shelves

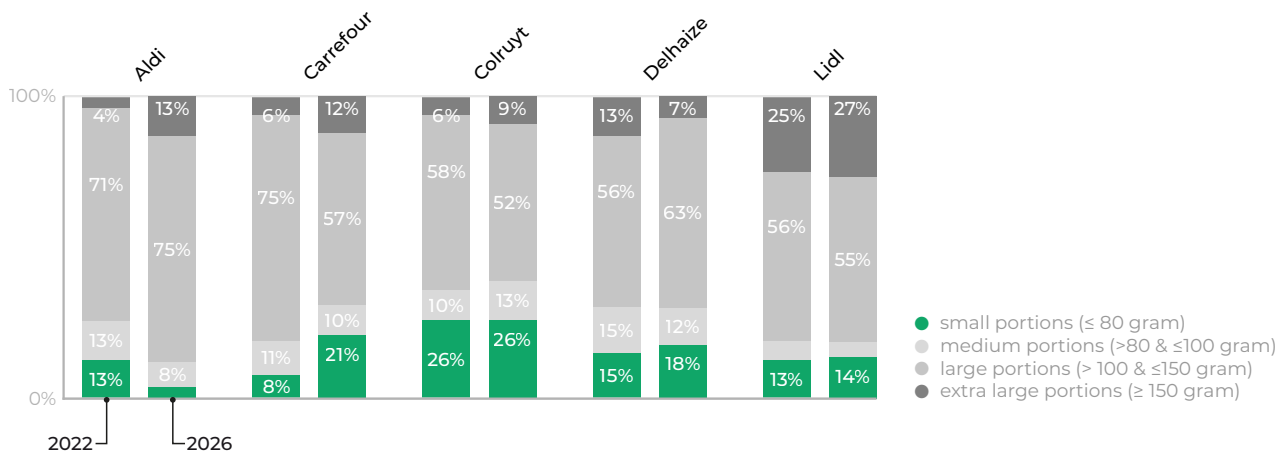


Figure 10 Development of meat portions since 2022. [\[Link\]](#)

Almost 9 out of 10 promotions are still for animal based products, though Colruyt leads in reducing meat promotions.

Promotions and pricing are powerful tools to shift consumer behaviour (24). Since the 2022 report, all five supermarkets have slightly decreased the share of animal-based products in their promotional leaflets.

However, on average 86 per cent of the promotions are still for animal-based products. **Colruyt** leads the sector with a 21 per cent decline in promotions of animal-based foods compared to 2022. By contrast, progress at the other supermarkets was marginal, ranging from a mere 2 to 6 percentage points reduction. Animal-based foods still dominate the promotional landscape, accounting for 75 to 91 per cent of all promotional offers.

Plant-based promotions rise slightly, but meat continues to dominate the flyers

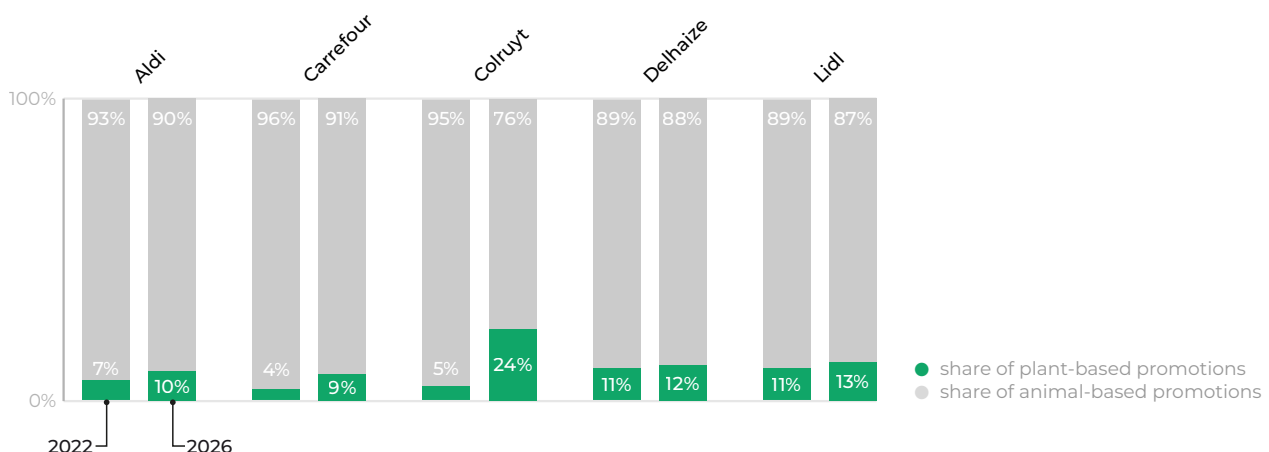


Figure 11 Development of plant-based promotions since 2022. [\[Link\]](#)

A significant barrier to the transition is the widespread use of multi-buys strategies on animal-based products.

Multi-buys are price promotions for which a customer only receives a discount when purchasing more than one product. Typical examples include “buy 4, pay for 3” or “buy 1, get 1 free”. Research shows that people consume the extra amount more quickly than they normally would (25). This is not only detrimental to customers’ wallets and health, since these products are often unhealthy, but also harmful to the environment. Each additional product generates extra emissions from land use, production, and packaging.

All supermarkets frequently offer volume discounts, led by Delhaize where more than half of all animal-based promotions are multi-buys. These multi-buy promotions are proven to lead consumers to buy more meat products than planned in order to receive a discount (25). To achieve a true transition, supermarkets must align their promotional strategies with their sustainability goals, shifting the focus away from volume-driven meat, fish, egg and dairy sales.

SHARE OF MULTI-BUYS FOR ANIMAL-BASED PRODUCTS

Delhaize: 55%
Colruyt: 46%
Carrefour: 42%
Lidl: 21%
Aldi: 18%



Figure 12 Examples of multi-buy offers from Aldi, Carrefour, Colruyt, Delhaize, Lidl. [\[link\]](#)

SUSTAINABLE AGRICULTURE

Supermarkets hardly move beyond the minimum for sustainable sourcing practices

KEY FINDINGS

- Supermarkets commit to buy deforestation-free commodities, but transparency and enforcement rarely go beyond legal minimums.
- Assortments show isolated sustainability improvements, though Lidl is taking a step back regarding organic dairy.
- Delhaize demonstrates the highest level of transparency regarding the origin, certification, cultivation and transport methods of its products.

Organic reporting and targets are still missing for more than half of the supermarkets

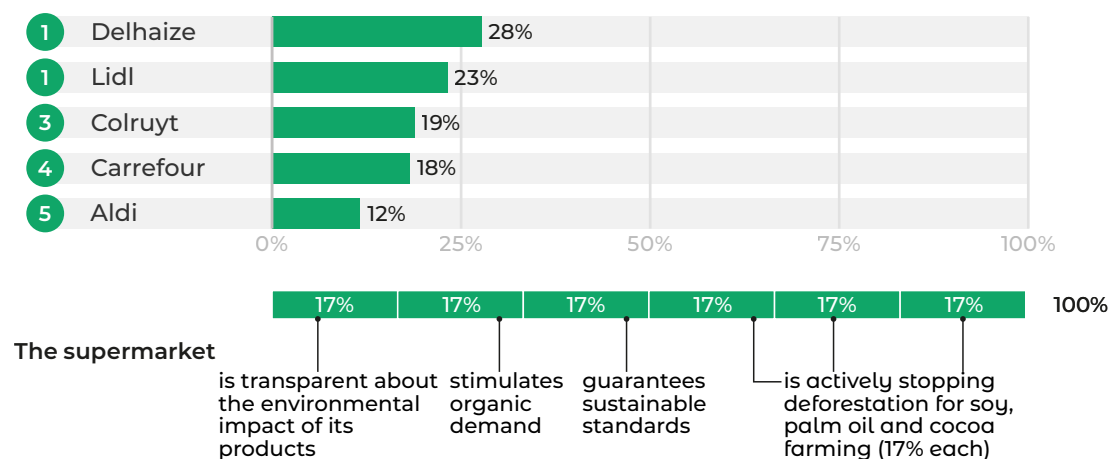


Figure 13 Ranking of supermarkets' efforts on sustainable agriculture. [🔗](#)



Photo: Herpendalvallei

Belgian supermarkets hold the leverage to drive a transition toward sustainable agriculture. By integrating strict sustainability criteria into purchasing agreements, retailers can enforce high environmental standards while ensuring suppliers are fairly compensated for eco-friendly practices. This accountability is crucial for high-risk commodities like palm oil, cocoa and soy, which remain the food sector's primary drivers of deforestation and carbon emissions.

Supermarkets commit to buy deforestation-free commodities, but transparency and enforcement rarely go beyond legal minimums.

The EU Deforestation Regulation (EUDR) legally requires supermarkets to keep track of their efforts to ensure that high-risk commodities like soy, palm oil, and cocoa do not contribute to deforestation (26). However, it's also crucial to protect other critical ecosystems such as savannas, wetlands, and grasslands, that are routinely cleared for agricultural expansion.

While all researched supermarkets use the EUDR cut-off date (refusing commodities from land deforested or converted after 31 December 2020), their voluntary policies rarely exceed this legal baseline.

Delhaize is the only retailer explicitly committed to stopping land conversion for cultivation of palm oil, soy and cocoa by 2025 (15).

All of the supermarkets collaborate with third parties on initiatives featuring measurable goals to improve transparency throughout the supply chain and/or to promote sustainable production. These include the Round Table on Responsible Soy Association (RTSR), Roundtable on Sustainable Palm Oil (RSPO) and Beyond Chocolate with IDH. Beyond these memberships, corporate accountability remains limited.

Carrefour stands out as the only supermarket providing more transparency on origin, by publishing a list of high-risk countries where the supermarket sources soy for animal feed (27). Crucially however, no supermarket fully goes beyond compliance of the EUDR regulation. None has published an action plan including a clear target date for implementing the commitments for deforestation-free and no land conversion across all soy, palm oil and cocoa suppliers. To address these risks, a public step-by-step action is needed, including concrete consequences if suppliers/traders do not comply with the agreements (i.e. escalation plan) such as dialogue, suspension and exclusion, as recommended by the Accountability Framework Initiative.

Progress also varies heavily by commodity type. While physically segregated, deforestation-free palm oil is commonly used in private-label products, it is not yet the case for soy and cocoa.

For soy used in animal feed, most supermarkets rely on book and claim certificates (see figure 15 for an explanation of certification levels definitions). These allow buyers to match their soy with credits purchased from soy produced in non-deforested areas, rather than guaranteeing that the physical soy in their own supply chain is deforestation-free.

THE EUROPEAN UNION DEFORESTATION REG- ULATION (EUDR)

From 30 December 2026 onwards, supermarkets and other companies will no longer be allowed to put products on the market that contribute to deforestation and forest degradation. The regulation requires companies, who are directly importing these commodities or producing them within the EU, to have knowledge of the origin of products and raw materials through geolocation, rather than relying solely on third-party certification. The EUDR applies to seven commodities: cocoa, coffee, timber, soy, palm oil, rubber and beef.

Cut-off date

Products must not originate from areas deforested after 31 December 2020.

Land conversion

Supermarkets can go beyond the EUDR by also avoiding land conversion. Land conversion refers to changes in land use other than deforestation, such as transforming natural areas into farmland for commodity production, which leads to loss of nature.

What are supermarkets doing to stop deforestation and land conversion?

		Aldi	Carrefour	Colruyt	Delhaize	Lidl
Commitment to deforestation-free commodities		✓	✓	✓	✓	✓
Transparent reporting of supply chain		✗	✓*	✗	✗	✗
Implementation and control	Efforts to stop deforestation and conversion via certification	✓ soy ✓ palm oil ✗ cocoa	✓ soy ✓ palm oil ✗ cocoa	✓ soy ✓ palm oil ✗ cocoa	✓ soy ✓ palm oil ✓ cocoa	✓ soy ✓ palm oil ✗ cocoa
	Action and escalation plans	✗	✗	✗	✗	✗
	Deforestation-free in purchasing conditions	✗	✗	✗	✗	✗
	Collaboration with third parties	✓	✓	✓	✓	✓
Published an action plan		✗	✗	✗	✗	✗

Figure 14 Supermarkets's strategies to stop deforestation and land conversion of natural ecosystems to produce soy for animal feed, palm oil and cocoa. [🔗](#)

*list of high risk sourcing countries

To ensure deforestation-free cocoa, **Delhaize** exclusively accepts Rainforest Alliance or Fairtrade certification for its private label assortment (28). **Colruyt** and **Lidl** accept these alongside EU Organic, though the organic label alone does not guarantee deforestation-free production (7,29). Aldi aimed for 100 per cent Fairtrade or Rainforest Alliance certified cocoa by 2025, but has not published any progress updates (30).

Which supply chains get which certification of deforestation-levels?

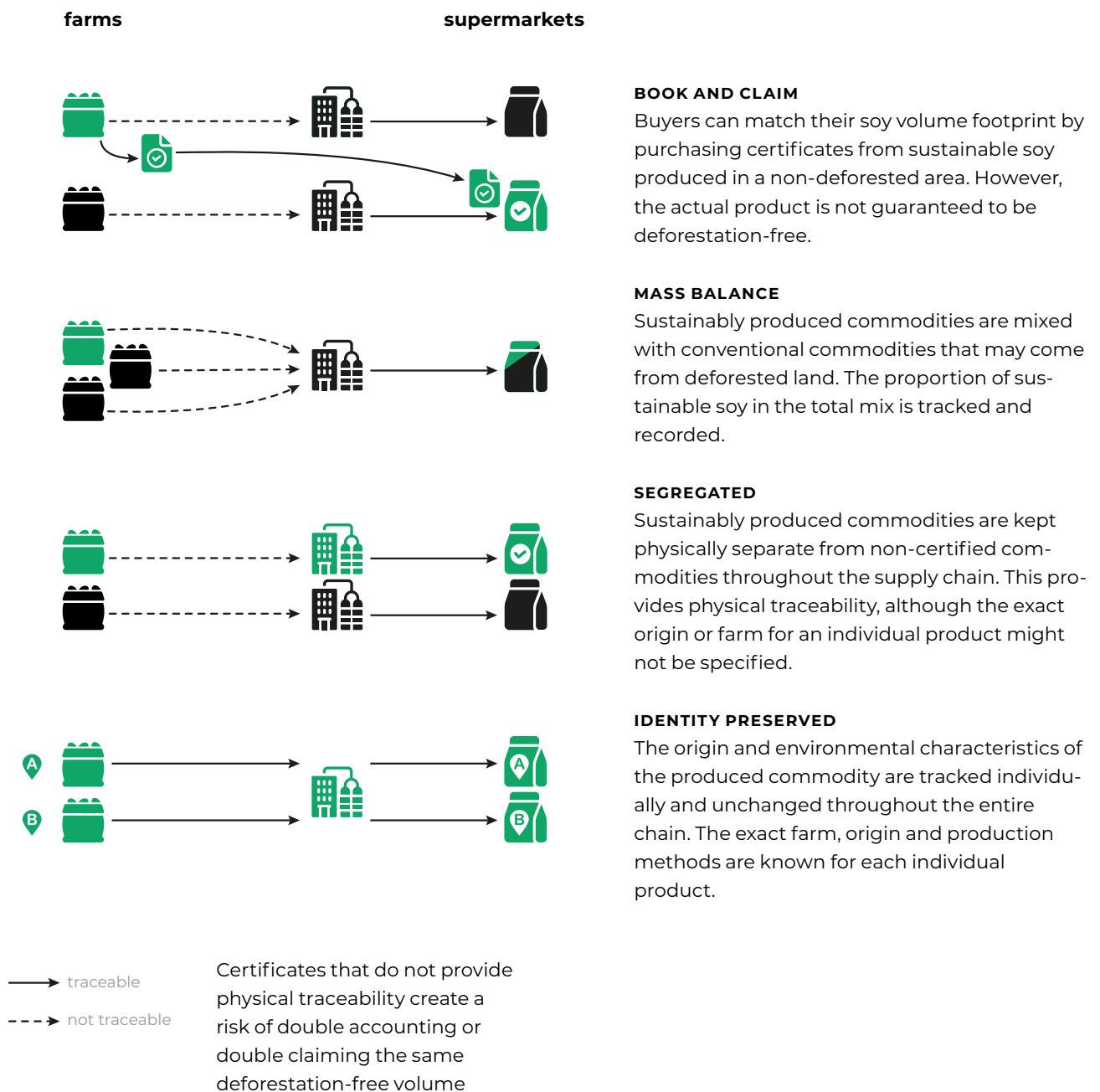


Figure 15 Definitions of certification levels for deforestation-free commodities. [🔗](#)

Certification levels for deforestation-free commodities

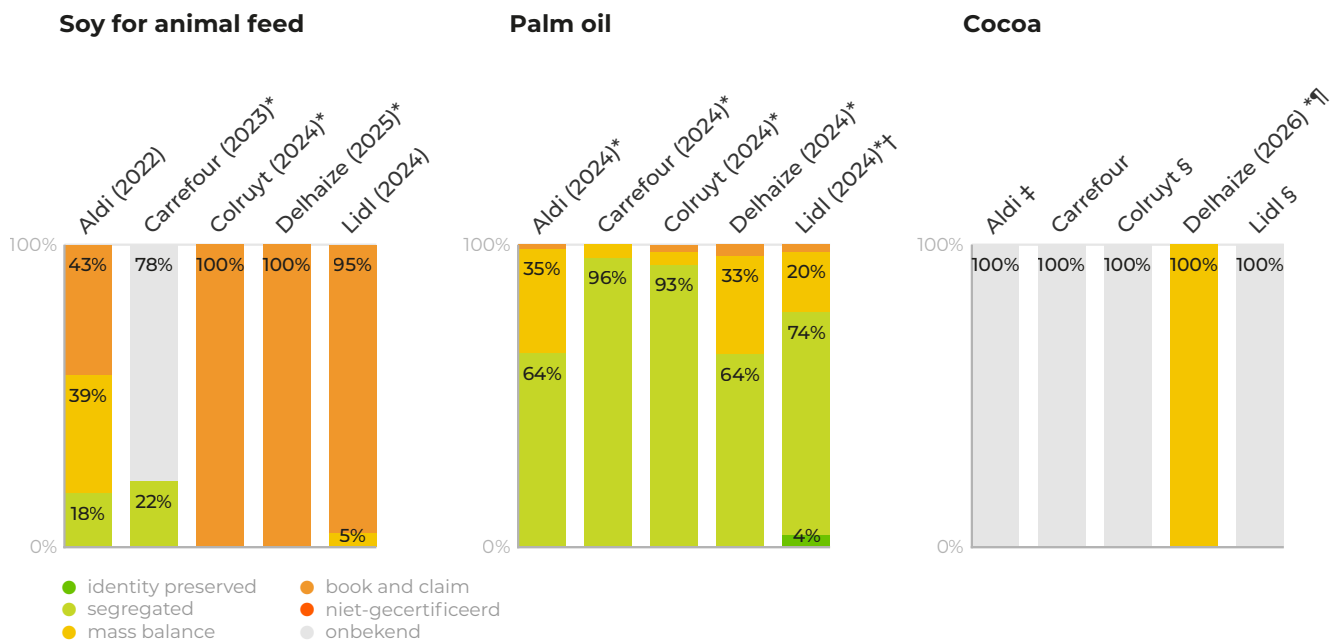


Figure 16 Levels of certification for the deforestation-risk commodities per supermarket. [🔗](#)

* Reporting based on private label assortment only

† Lidl reported after the data collection period that the supermarket purchases 100 per cent segregated palm oil for food products since the end of 2023.

‡ Aldi set the target to only purchase cocoa with the Fairtrade or Rainforest Alliance certification by 2025, but the supermarket has not reported progress on this target.

§ Colruyt and Lidl purchase cocoa with either the Fairtrade, Rainforest Alliance, or the EU organic certification. However, the EU organic does not guarantee deforestation-free cocoa. The exact share of purchased cocoa with a Fairtrade or Rainforest Alliance certification, which is guaranteed deforestation-free, is unknown.¶ Delhaize purchases cocoa with a Fairtrade or Rainforest Alliance certification, however the level of certification is unknown. Therefore, it is assumed that the certificates guarantee a mass balance level.

Assortments show isolated sustainability improvements, though Lidl is taking a step back regarding organic dairy.

Supermarkets can drive a sustainable agriculture transition by enforcing minimum standards in their purchasing conditions. To evaluate this, sampling was conducted for product types that are widely sold, reflecting the extent to which supermarkets take responsibility for making agriculture more sustainable.

Aldi and **Lidl** take full responsibility for their tea assortments by ensuring the entire product range carries EU organic, Fairtrade, or Rainforest Alliance certifications. **Lidl** applies this same standard to its bananas.

Remarkably, most other assortment changes represent a step back compared to 2022. Lidl no longer offers any regular milk, yoghurt or gouda cheese covered by relevant environmental certifications. This is a significant step back, given the high sales volume of dairy products.

Colruyt has stopped offering organic meat and Aldi no longer stocks organic apples. None of the supermarkets offer organic melons or grapes anymore.

Delhaize demonstrates the highest level of transparency regarding the origin, certification, cultivation and transport methods

Transparency is the foundation of a sustainable food system, and supply chain visibility is a prerequisite for supermarkets to set targets and drive improvements.

Currently, **Delhaize** stands out as the most transparent supermarket regarding the origin, cultivation and transport methods of its product range (31). The vast majority of its vegetables, eggs, milk, meat and fish are produced in Europe, often in Belgium, with road transport favored and air freight limited to a tiny fraction of vegetables.

Lidl notes that roughly 80 per cent of its fresh fruit and vegetables originate in Europe, whereas its last audited disclosure on certified sustainable fish volumes dates back to 2017 (32,33).

Aldi, Carrefour and Colruyt have not updated their reporting on product origins or certified sustainable volumes since 2022. Similarly, with the exception of Delhaize, no retailer has published updated figures on their share of certified sustainable fish.

Supply chain transparency across supermarkets

	Aldi	Carrefour	Colruyt	Delhaize	Lidl
Origin	✗	✗	✗	✓	✓
Certifications	✗	✗	✗	✓	✗
Cultivation methods	✗	✗	✗	✓	✗
Transport methods	✗	✗	✗	✓	✗

Figure 17 Delhaize is the only retailer providing up-to-date reporting across all four transparency categories. [🔗](#)

To protect ecosystems from environmental impacts of conventional farming such as pesticide and nitrogen pollution, the European Union aims for 25 per cent organic farmland by 2030. Since supermarkets determine demand, setting targets to increase organic sales is crucial to meeting this ambition.

While **Colruyt** and **Delhaize** actively disclose their organic sales shares, 3.9 per cent in total turnover and 5.6 per cent in total sales respectively, and **Carrefour** last updated its fresh organic metrics in 2024, no Belgian supermarket has set a binding target to increase organic

sales (31,34,35). Without clear strategies to stimulate organic demand, driving the broader agricultural transition remains impossible.

High sustainability standards have yet to become the default

ORGANIC AGRICULTURE AS A CONCRETE SOLUTION

The current form of agriculture in Europe is unsustainable; emissions of greenhouse gases, ammonia, particulate matter and pesticides have major harmful consequences for the climate, water and biodiversity. Agriculture must modernise to better protect ecological boundaries. An important part of this modernisation of agriculture is the EU's objective to increase the area of organic farming to 25 per cent by 2030.

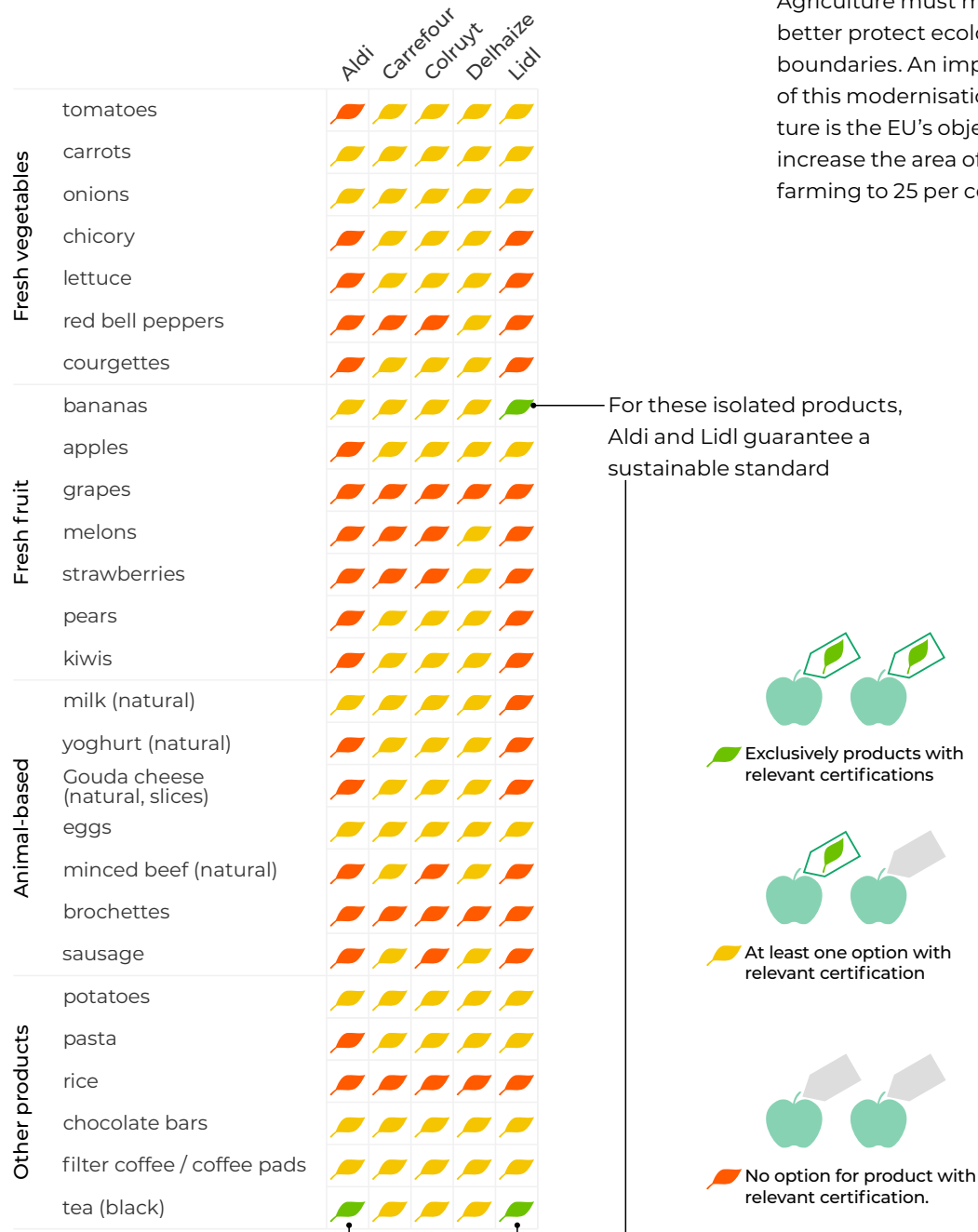


Figure 18 Sustainability of the assortment in different product types per supermarket. [\[Link\]](#)

FOOD WASTE

Food waste: a blind spot in the supply chain and consumer stage

KEY FINDINGS

- All supermarkets have interventions in place to reduce food waste within their own operations.
- None of the supermarkets have established targets, or action plans to tackle food waste at either the supply chain or the consumer stage.

No supermarket tackles food waste in the supply chain or consumer stage

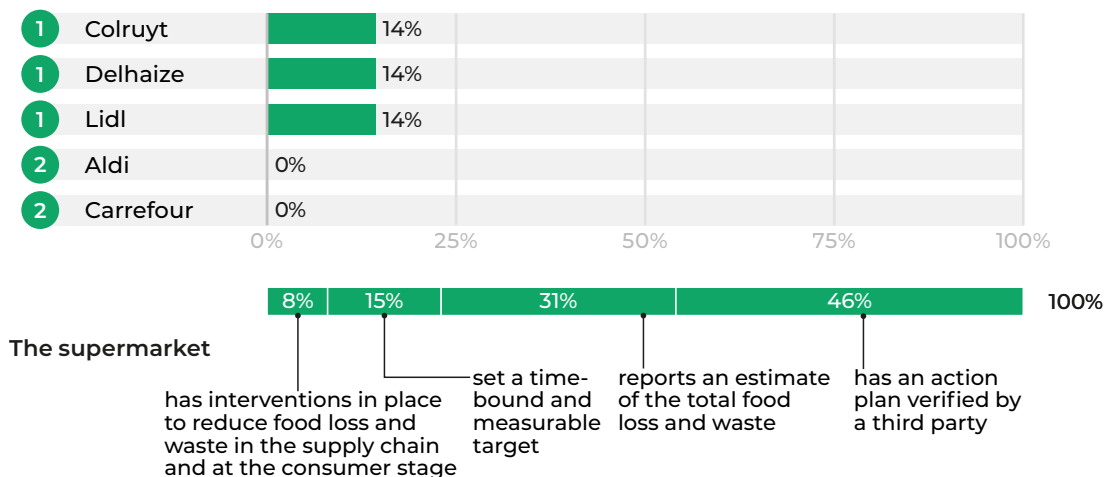


Figure 19 Supermarkets' efforts on reducing food waste. [🔗](#)



Photo: Erman Gunes

Driven by stock issues and short shelf lives, supermarkets' food waste and loss account for 8 per cent of Belgium's food waste, a metric supermarkets can directly cut through optimised logistics (36,37). However the largest hot spots sit outside their operations: 41 per cent of Belgium's per capita food waste occurs during production and 43 per cent happens in households. While retailers do not control households directly, their marketing strategies heavily dictate behaviour. Volume-driven promotions, bulk campaigns, and extra-large packaging routinely pressure shoppers to buy excess. To curb food waste, supermarkets must reform these commercial strategies to support waste reduction both upstream and downstream.

All supermarkets have interventions in place to reduce food waste within their own operations.

While roughly 80 per cent of food waste occurs outside direct retail operations, both upstream in the supply chain and downstream at the consumer level, most supermarkets limit their efforts to their own stores and warehouses. Standard practices include improved forecasting and stock-management, discounting close-to-expiration products, and donating surpluses to food banks.

Carrefour, **Delhaize** and **Lidl** do have some interventions in place to reduce food waste in their supply chains (38–43). **Colruyt** for instance

The majority of food waste occurs upstream or downstream



Figure 20 Food waste by sector of activities in 2023 in Belgium. Eurostat provides food waste data aggregated at the national retail sector level. Because store-level datasets are unavailable, this visual shows the sector-wide average. [🔗](#)

adapts its production processes and works on product innovation to mitigate losses from food surpluses. **Delhaize** partners with suppliers by innovating (e.g. making products from waste), packaging adjustments and manufacturing changes. They also participate in an initiative to strengthen supplier collaboration to tackle food waste occurring upstream. Similarly, **Lidl** drives innovation by introducing new products such as soups made from vegetables that fail standard retail aesthetics.

To address household food waste **Carrefour**, **Delhaize** and **Lidl** print logos on packaging encouraging consumers to first “look, smell, taste” the product before discarding them. **Delhaize** also provides tips and recipes via its consumer magazine to help customers minimise waste at home.

None of the supermarkets have established targets, or action plans to tackle food waste at either the supply chain or the consumer stage. While all supermarkets have formulated targets to reduce food waste within their own operations, none address the broader value chain (see targets and progress in Figure 26). Former supply chain targets (like those Delhaize and Colruyt held in 2022) have lapsed without being replaced, leaving the broader value chain unaddressed. To drive meaningful change across the entire food system, supermarkets

must formulate binding targets and publish comprehensive action plans that target food waste downstream and upstream as well. The food loss action plan of the Flemish government aimed for a 30 per cent reduction in food loss in 2025 compared to 2015, and has not yet published a new target (44). While the Flemish government reports progress on several metrics, (such as the percentage of supermarkets donating surpluses to food banks or converting waste to biogas, and household composting rates), the framework does not address the role of supermarkets in actively reducing food waste throughout their broader, commercial value chains.

Are supermarkets transparent about the supply chains?

		Aldi	Carrefour	Colruyt	Delhaize	Lidl
Interventions	in the supply chain	✗	✗	✓	✓	✓
	in own operations	✓	✓	✓	✓	✓
	at consumer stage	✗	✗	✓	✓	✓
Target	in the supply chain	✗	✗	supply chain target has lapsed since Superlist 2022	supply chain target has lapsed since Superlist 2022	✗
	in own operations	-50% by 2030 (30)	No new target	-50% by 2030 (vs 2023) (40)	-50% of unsold products that are still edible are donated, by 2030 vs 2016 (41)	-70% in operations and logistics by 2030 (vs 2015) (43)
	at consumer stage	✗	✗	✗	✗	✗
Transparency		Progress has not been reported since 2023	2025 target achieved early: -50% in 2024 (vs 2016) (4)	44.7% in 2023 and 48.3% in 2025* (40,45)	96% reduction achieved across internal waste streams (donations, biogas, feed) (41)	23% reduction achieved (43)
Action Plan		✗	✗	✗	✗	✗

Figure 21 Food waste targets remain limited to internal operations, leaving supply chains and consumers unaddressed. [🔗](#)

* Colruyt reported progress on this target in its 25/26 annual report which was published after the data collection.

Published after data collection in latest annual report (not included in scoring)

Delhaize is most transparent about mapping sources of food waste. The supermarket reports the reduction of food waste per strategy: source reduction (unsold products), donations, and reuse/repurposing for animal feed, rendering, and energy such as biogas.

Recommendations

Superlist Environment provides insight into how supermarkets contribute to nature conservation, climate goals and a healthy environment, and what steps they can take to improve. This chapter gives sector-wide recommendations, followed by supermarket specific recommendations in the next chapter to help supermarkets contribute to a more sustainable food system. The recommendations below for improving policies, initiatives, advertising leaflets and product range apply to all supermarkets researched in Superlist Environment.

Recommendations for all supermarkets

CLIMATE PLAN

- **Report Scope 1, 2 and 3 emissions annually**, and set a reduction target for Scope 3 emissions in line with the Paris Agreement.
- **Publish a detailed roadmap** outlining quantified measures to achieve the near-term Scope 3 target.
- **Provide financial support for suppliers** to implement sustainable practices to reduce Scope 3 emissions.

PROTEIN TRANSITION

- **Report the protein split** and set a target to increase the share of plant-based proteins in line with the Planetary Health Diet.
- **Align and use the same methodology across supermarkets** at a national level to ensure comparability. Use one of the following recognised and commonly used methodologies: WWF, Eiweet or Eimeet.
- **Develop and test nudging interventions** to support consumers in adopting more plant-rich diets, using incentives that target pricing, placement and routines:
 - a. Reduce the share of animal-based, protein-rich products in weekly promotions.
 - b. Reduce the share of ready meals containing animal proteins to show examples of plant-rich meals.
 - c. Apply other nudges towards plant-based, such as price-parity for meat and meat substitutes, the placing of plant-based alternatives right next to comparable meat products, etc.

SUSTAINABLE AGRICULTURE

- **Publish an action plan** with a clear target date for implementation of the zero-deforestation and conversion policy for natural ecosystems for all suppliers of soy, palm oil and cocoa. An action plan ideally contains the following:
 - a. clear procedures on how to act when there is information exposing a deforestation risk;
 - b. proactive engagement with/of suppliers on no-deforestation
 - c. An escalation approach (e.g. grievance mechanism) with concrete consequences in case of non-compliance, including dialogue with suppliers as recommended by the Accountability Framework Initiative.
 - d. a due diligence system that allows for information collection, risk analysis and risk mitigation of deforestation and conversion.
- **Set a target to increase the share of organic products sold**, and report annually on progress.
- **Guarantee higher sustainability standards** by offering at least one option with a relevant sustainability certification per product type.

FOOD WASTE

- **Map and report the amount of food loss and waste** across the supply chain and at the consumer stage to identify the largest sources and determine the most effective strategies.
- **Set a target to reduce food loss and waste** in the supply chain and at the consumer stage.
- **Develop and report on an action plan** with measures to reduce food loss and waste in the supply chain and at the consumer stage.

Supermarket specific recommendations

In addition to the sector-wide recommendations, below are the top recommendations per supermarket that could make the highest impact.



Aldi

- **Climate plan:** Report Scope 1, 2 and 3 emissions annually, set a near-term target to reduce Scope 3 emissions in line with the Paris Agreement.
- **Protein transition:** Report the protein split and set a target to increase the share of plant-based proteins in line with the Planetary Health Diet. To ensure comparability, use one of the following recognized and commonly used methodology: WWF, Eiweet or Eimeet.
- **Sustainable agriculture:** Publish an action plan with a clear target date for implementation of the zero-deforestation and conversion policy for natural ecosystems for all suppliers of soy, palm oil and cocoa.
- **Food waste:** implement interventions to reduce food waste in the supply chain and the consumer stage.



Carrefour

- **Climate plan:** Provide financial support for suppliers to implement sustainable practices to reduce Scope 3 emissions.
- **Protein transition:** Report the protein split annually and set a target to increase the share of plant-based proteins in line with the Planetary Health Diet.
- **Sustainable agriculture:** Publish an action plan with a clear target date for implementation of the zero-deforestation and conversion policy for natural ecosystems for all suppliers of soy, palm oil and cocoa.
- **Food waste:** implement interventions to reduce food waste in the supply chain and the consumer stage.



Colruyt

- **Climate plan:** Set a near-term and quantified emissions reduction target that covers all of Scope 3 in line with the Paris Agreement.
- **Protein transition:** Develop and test nudging interventions to support consumers in adopting more plant-rich diets, using incentives that target pricing, placement and routines:
 - a. Reduce further the share of animal-based protein-rich products in weekly promotions.
 - b. Reduce the share of ready-to-eat meals containing animal proteins to show examples of plant-rich meals.
 - c. Apply other nudges towards plant-based, such as price-parity for meat and meat substitutes, the placing of plant-based alternatives right next to comparable meat products, etc.
- **Sustainable agriculture:** set a target to increase the share of organic products in total sales, and specifically for food categories with the largest potential to increase organic farmland in Europe.
- **Food waste:** set a target to reduce food waste in the supply chains and at the consumer stage.



Delhaize

- **Climate plan:** Publish an action plan with a clear target date for implementation of the zero-deforestation and conversion policy for natural ecosystems for all suppliers of soy, palm oil and cocoa
- **Protein transition:** to ensure comparability and reliability, use one of the following recognized and commonly used methodology: WWF, Eiweet or Eimeet.
- **Sustainable agriculture:** set a target to increase the share of organic products in total sales, and specifically for food categories with the largest potential to increase organic farmland in Europe.
- **Food waste:** Set a target to reduce food waste in the supply chain and at the consumer stage.



Lidl

- **Climate plan:** Provide financial support for suppliers to implement sustainable practices to reduce Scope 3 emissions.
- **Protein transition:** Develop and test nudging interventions to support consumers in adopting more plant-rich diets, using incentives that target pricing, placement and routines:
- **Reduce further the share of animal-based protein-rich products in weekly promotions.**
 - a. Reduce the share of ready-to-eat meals containing animal proteins to show examples of plant-rich meals.
 - b. Test and implement other nudges to increase the sales plant-based products and decrease the sales of animal-based products.
- **Sustainable agriculture:** develop the strategy for more organic by:
 - a. re-introducing organic milk and dairy in the assortment.
 - b. reporting and setting a target to increase the share of organic products in total sales, and specifically for food categories with the largest potential to increase organic farmland in Europe.
- **Food waste:** Set a target to reduce food waste in the supply chain and at the consumer stage.

Glossary

Belgian context

Besides several international agreements such as the Paris Climate Agreement, Green deal, there are also important Belgian agreements where supermarkets play an important role. For example, Wallonia's 'Manger Demain' strategy and the Food Wallonia Action Plan includes 19 actions for the transition to a sustainable food system (56).

For food waste, there is now a clear 2030 target of 30% less food waste per person, based on the 2021–2023 average. For plant-based proteins, Wallonia currently has a big deficit in plant protein crops and wants to reach 15,000 hectares of protein crops by 2030. The goal of the Brussels Region's food strategy 'Good Food 2 (2022–2030)' is to make the Brussels food system more sustainable by 2030, from production to consumption (57). Key principles include eating less animal protein, more plant-based options, choosing local and seasonal products, and reducing food waste.

Common base year

The year 2019 is the base year commonly used to measure progress towards the goals of the Paris Agreement. Not all companies have disclosed their 2019 baseline emissions yet. It is never too late to start reporting, but without comparison to the same baseline, it is much harder to assess if the reductions that the supermarket has achieved are sufficient to reach the goals of the Paris Agreement using the IPCC pathway of 1.5°C "no or limited overshoot". In almost all cases, companies can still calculate their 2019 emissions retrospectively. If a company has undergone structural changes – for instance, through mergers or acquisitions – the Greenhouse Gas Protocol provides guidelines for "rebaselining" (46). Rebaselining and reducing emissions can be done simultaneously.

Target validation by the Science Based Targets initiative (SBTi)

The Science Based Targets initiative (SBTi) is a global collaboration that offers practical tools to help companies translate the scientific requirements of the Paris Agreement into credible reduction targets in line with its ambition. Many supermarkets submit their climate

plans to the SBTi for validation. The validation status of supermarkets' climate plans can be found in the SBTi Target Dashboard (47).

Validation of supermarkets' targets in line with 1.5°C covers reduction targets for emissions in Scopes 1 and 2, and for FLAG-emissions in Scope 3. However, the model currently cannot verify whether reduction targets for non-FLAG emissions in Scope 3 are in line with 1.5°C. From 2027 onwards, this will be possible for supermarkets that have overarching emissions reduction validated targets for Scope 3.

Rebalancing protein sales to address climate change

Animal products account for half of all emissions from food production. This makes rebalancing protein sales a key element in supermarkets' emission reduction strategies.

Therefore, the Planetary Health Diet translates into a diet in which protein-rich food groups are composed of 60 per cent plant-based proteins and 40 per cent animal proteins, helping to keep the food system within planetary boundaries. When looking at the whole diet, this translates into 74 per cent plant-based foods and 26 per cent animal-based foods (48,49). The goal is not to replace all animal-based protein sources with plant-based alternatives, as the average European diet already provides more protein than is sustainable within planetary boundaries (50). The protein transition should be seen as part of a broader shift towards a more balanced and sustainable diet.

Green Deal Protein Shift on Our Plate

The Green Deal Protein Shift on Our Plate is a collaborative project of the Flemish government started in 2021 promoting plant-rich diets to reduce the environmental impact of the food system. Through this deal, the Flemish government has set the target to reach a 60:40 ratio in protein consumption by 2030 with 60 per cent plant-based and 40 per cent from animal protein sources (51). It brings together all the players in food chains: farmers, retail, catering and consumers, to fundamentally transform consumption patterns. However, current figures show a significant gap between ambition and reality (52). In Flanders, the share of plant-based proteins hovers around 42.6 per cent, leaving animal proteins dominant at 57.4 per cent. Upon launching the Green Deal Protein Shift on Our Plate framework at the end of 2025, the Flemish government concluded that the current transition rate, averaging a mere 0.4 per cent shift per year, is far too slow to reach the 2030 targets without more drastic intervention.

High deforestation-risk commodities

Soy for animal feed

The vast majority of soy is used as animal feed for the production of animal products such as meat, cheese and milk. However, soy cultivation requires massive land allocation, frequently expanding at the expense of forested areas and other important ecosystems (53). This deforestation accelerates climate change and drives severe biodiversity loss.

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.

Cocoa

Belgium is Europe's second-largest cocoa bean importer and an important distributor of cocoa derivatives, mainly for cocoa-processing industries in neighbouring countries (54). To maintain or increase productivity in the cocoa farming, forest encroachment is currently more often the most economically viable option. This is especially applicable to farmers who structurally do not receive sufficient financial support for the adoption of sustainable practices (55).

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