Superlist Environment Germany 2025

edition 1

Supermarkets acknowledge their role in sustainability, but show little action yet

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Supermarkets acknowledge their role in sustainability, but show little action yet

Supermarkets are starting to address climate and biodiversity crises in their reporting and their ambitions. Real changes on their shelves or in their promotions however, are still to be expected. While supermarkets' (new) strategies are a promising acknowledgment of their responsibility, in practice they do not use their influence yet to promote a plant rich diet and sustainable agriculture. In this 2025 ranking Lidl leads the way, followed by Aldi Süd, while Aldi Nord lags furthest behind.

Ranking Superlist Environment Germany 2025

How much responsibility do supermarkets in Germany take for sustainability?

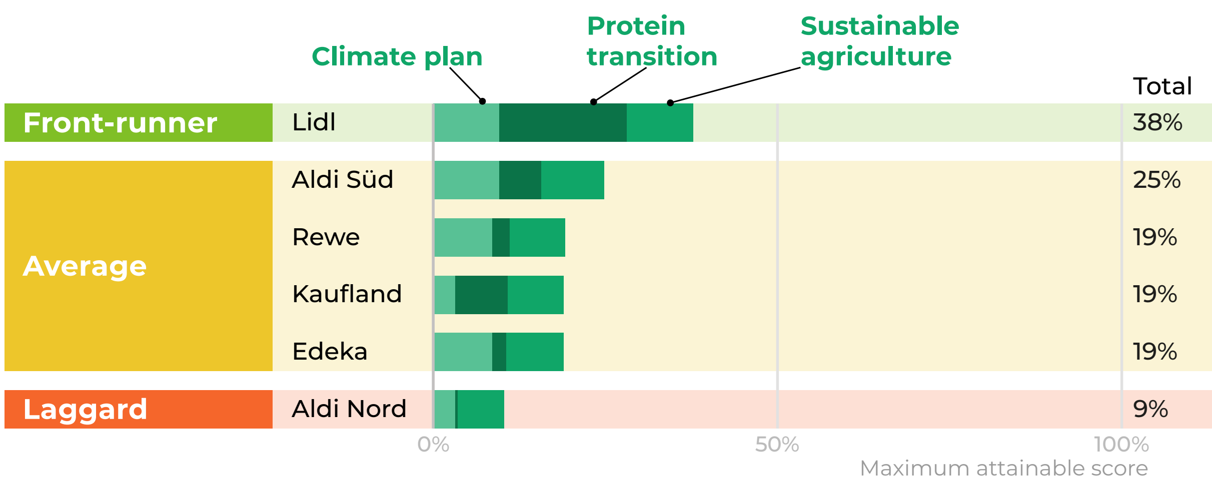

Figure 1 Ranking of supermarkets in Superlist Environment Germany 2025, showing total score and supermarkets' performances on individual topics.

SUMMARY SUPERLIST ENVIRONMENT GERMANY 2025

Climate plans

Supermarkets start reporting emissions, no roadmaps to net-zero

Aldi Süd, Edeka, Kaufland, Lidl and Rewe have committed to the net-zero target by 2050 latest and also include interim targets. However, none of the supermarkets have yet published a roadmap that helps them take effective measures in time to achieve their targets. Most supermarkets publish their direct (scope 1), indirect energy (scope 2) and indirect value chain (scope 3) emissions. Aldi Nord only publishes their scope 1 and 2 emissions.

Protein transition

First supermarket has set a protein split target

Kaufland and Lidl give insight into the protein split in their sales: the ratio of plant-based versus animal-based products that are rich in protein. To determine this ratio, Kaufland and Lidl use the WWF Protein Disclosure methodology. Aldi Süd reports the percentage of plant-based versus animal-based sales via their own measurement methodology. Lidl, as the only supermarket with a goal, aims to reduce the share of animal-based protein to 40 percent by 2050 and has an interim target for 2030.

In practice supermarkets seem to do little to stimulate plant-based sales. On average 92 percent of the protein promotions are for animal-based proteins in their weekly promotional flyers. Besides, 72 percent of popular meat products have an extra large portion size (>150g).

Sustainable agriculture

Customers cannot rely on supermarket for responsibly produced food

While supermarkets often hold products with sustainability certificates, they keep offering the unsustainable version as the standard. None of the supermarkets are transparent about the shares of sustainably certified vegetables, fruits, eggs, dairy, meat and fish in their sales.

All supermarkets but Aldi Nord have publicly committed to deforestation- and conversion-free soy by 2025. Supermarkets however are hardly transparent about how they ensure this in their supply chains and miss concrete action plans.

Regarding palm oil, many supermarkets have most palm oil certified. All supermarkets, except Rewe, have set a public commitment to sourcing deforestation- and land-conversion free palm oil, and expect suppliers to have this commitment as well. Monitoring systems and policies to measure traceability are lacking for most supermarkets.

Foreword

Charlotte Linnebank
General Director
Questionmark

Questionmark

German supermarkets are among the largest in Europe. Combined with their influential position in the food system, they shoulder significant responsibility to lead the transition towards a sustainable food system. The launch of Superlist Germany will hopefully mark an important step in this journey.

I extend my gratitude to our civil society partners, members of Questionmark's Scientific Council, our collaborators at the Umweltbundesamt, and the supermarkets involved for their contributions. Their input has enabled us to present this concise, fact-based baseline assessment of how German supermarkets support sustainable agriculture and environmentally responsible consumption, along with tailored recommendations for improvements.

It is encouraging to see supermarkets setting goals, such as net-zero targets, reporting on plant-based versus animal proteins in sales, and committing to deforestation-free products. However, ambition alone is not enough. Supermarkets need to back their promises with concrete action plans and implementation measures to ensure meaningful progress.

Together, let us support German supermarkets in leading Europe's food sector toward becoming a positive force for addressing climate and biodiversity challenges and creating a healthier planet.

Esther Erhorn
Interim Director
Corporate Outreach
Albert Schweitzer Foundation

Albert Schweitzer Foundation

As central players in complex value chains, food retailers have a major social and environmental responsibility. They influence sustainability standards of production and what we eat. This report provides a fact-based insight into their efforts and, above all, highlights areas for improvement.

The key question is whether and to what extent food retailers are offering and promoting plant-based proteins instead of animal proteins. Responsible companies set themselves ambitious targets and report transparently on progress - but this is by no means the case for all six companies analysed. Too often, responsibility is still shifted onto consumers. We expect all food retailers to take ownership of their role and actively work towards a sustainable future with consistency and transparency.

Florian Wall
Senior Associate
Germany
Madre Brava

Madre Brava

Supermarkets link millions of consumers and producers worldwide. They can therefore wield tremendous influence over the food we eat.

In Germany, this influence is strong. The five biggest retailers enjoy 75% market share and are market leaders beyond their country of origin.

Superlist is an invaluable insight into how much these food retailers contribute to a food system that is 100% healthy, sustainable and affordable. It is encouraging to see all but one of the retailers assessed here has committed to achieving Net Zero by 2050 or earlier. Madre Brava's latest report on cost-effective climate paths proves that retailers need a shift to plant-rich diets and sustainable agriculture to achieve those ambitious climate targets. All of this is assessed in Superlist. It provides the necessary transparency for consumers to make informed buying choices, for policymakers to better assess retailers' sustainability performance and for retailer executives to prioritise the most effective climate mitigation efforts accordingly.

Niklas Oppenrieder
Co-founder and Chairman of the Board at PAN International

Physicians Association for Nutrition Germany

An intact environment is the foundation for personal health. Climate change, with its devastating impacts like heat waves, floodings, air pollution and food shortages, is the biggest health threat of this century.

At the same time, many sustainable food choices preserving our environment are also healthy food choices preserving our health and fitness. This is especially true for unprocessed or minimally processed plant foods like whole grains, legumes, vegetables, nuts, fruits, spices, and mushrooms.

As health professionals committed to public well-being, we strongly support Superlist Environment as a valuable tool for the most crucial food environment in our society: supermarkets. We urge retailers to empower customers to make eco-friendly choices and will closely monitor their efforts based on Superlist recommendations. Retailers' actions play a critical role in safeguarding both environmental and public health in Germany.

Virginia Cecchini Kuskow
Senior Project Manager at ProVeg

ProVeg Germany

Supermarkets have tremendous power to influence people to buy healthy, climate-friendly, plant-based food in their weekly shop. Superlist Environment details how much, and by what means, supermarkets in Germany can and should actively promote sustainable, plant-based protein, given the market position they hold in Europe.

Consumer demand is there, with one in two people in Germany following a flexitarian, vegetarian or vegan diet. ProVeg therefore advocates for supermarkets to target their protein split and promotional communication to drive the further uptake of plant-based over animal-based protein.

Clear goals need clear benchmarks and the latest data from Superlist Environment, which applies to some of the largest supermarket chains in the EU, marks a decisive step forward for the sector. From now on, progress in implementation is clearly identifiable: we have entered a new phase of action and retailers can prove how much they support consumers in making effectively sustainable food choices.

Introduction

Supermarkets play a crucial role in daily life and are an indispensable part of our society. Over 70 percent of the food that Germans consume daily, they buy in supermarkets (Gastrotel, 2025; DBV, 2025; LZ, 2025). Supermarkets also have a major influence on how their suppliers produce food and what their customers buy.
This gives supermarkets the opportunity to demand more sustainable farming methods from suppliers and to encourage sustainable diets among their customers. Supermarkets' powerful position in the market as well as their concentration in a handful of companies per country, often supranational, makes them an exceptional leverage in the food system.

What is Superlist?
Superlist is an international ongoing research project that reveals the extent to which supermarkets contribute to a healthy and sustainable food system and enable their customers to eat healthy, sustainable and fair food. The supermarkets included in this edition are Aldi Nord, Aldi Süd, Edeka, Lidl, Kaufland and Rewe. Together they represent over 60 percent of the German market (LP, 2024).
Superlist Environment enables supermarkets to compare their sustainability efforts with their competitors and learn from best practices. In addition, Superlist provides concrete recommendations for each supermarket, to contribute to a more sustainable food system.

About Superlist Environment
This Superlist is the first edition of Superlist Environment Germany. Superlist Environment has already been published in the Netherlands, Belgium, Sweden and the UK. This first Superlist Environment in Germany is a baseline measurement. It provides insights in the performances of supermarkets on: climate plans, protein transition and sustainable agriculture.
The methodology for this research was published on September 23rd 2024 (Questionmark, 2024a). Consulted for the methodology were: the supermarkets, Questionmark's Scientific Council, German civil society partners: Albert Schweitzer Foundation, Madre Brava, Physicians Association for Nutrition Germany and ProVeg Germany. Questionmark collected the data between September 23rd and November 17th 2024.
The background report gives a complete overview of the underlying data (Questionmark, 2025).

Reading guide
Supermarkets that perform well on a specific research indicator are marked with the '**this counts**' icon in the margin.
Not all supermarkets' measures are extensive enough to count in the ranking. Small steps in the right direction are also worth noting and are therefore marked with the '**good step**' icon.
Where percentages are rounded off to whole numbers (without decimals), figures may not add up to 100 percent.

CLIMATE PLAN

Supermarkets start reporting emissions, no concrete roadmaps to net-zero yet

KEY FINDINGS

- → Aldi Süd, Edeka, Kaufland, Lidl, and Rewe commit to become net-zero in 2050 and they have set interim targets. Aldi Nord is the only supermarket that has not committed to this goal.
- → Aldi Süd, Edeka, Kaufland, Lidl and Rewe also publish their scope 3 emissions. With the exception of Kaufland[1], these all differentiate their agriculture and industry related emissions.
- → None of the supermarkets have a climate roadmap that helps them take effective measures in time to achieve their net-zero target.

Net-zero emission commitments, inadequate plans to achieve this

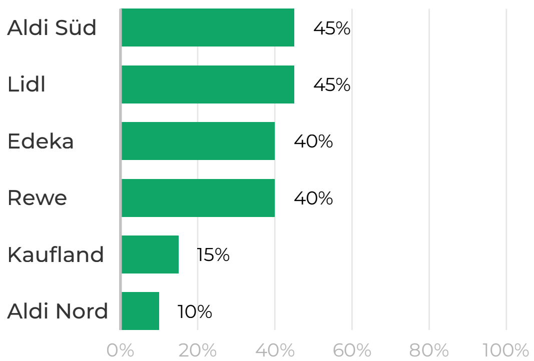

Figure 2. Supermarkets performance on climate plans ●.

Industries and companies, including supermarkets, are major contributors to greenhouse gas emissions. With that, supermarkets have a big responsibility to reduce the emissions in the chain. That begins with transparency into the current emissions, a target to reduce the emissions, and a roadmap to reach these targets.

Most supermarkets commit to the European net-zero target of 2050 and set interim targets

Aldi Süd, **Edeka**, **Kaufland**, **Lidl** and **Rewe** have committed to reach net-zero greenhouse gas emissions across the value chain by 2045 or 2050 (Aldi Süd, 2024c; Schwarz Group, 2024; Lidl DE, 2023b; Rewe Group, 2023; Edeka, 2023). Aldi Nord is the only supermarket that has not publicly committed to the net-zero target (figure 3). All supermarkets have set interim targets to achieve their net-zero target. Rewe has set multiple interim targets, for 2028, 2029 and 2030. Edeka has differentiated their interim targets with an interim target for 2028 for scope 1 and 2 and a separate interim target for 2032 for scope 3.

this counts

1 After the data collection period of this research, Kaufland published a Climate Balance report, in which they distinguish their scope 3 emissions between agriculture and industry related emissions.

Climate target of net-zero emissions
The climate target of net-zero emissions by 2050 is the EU's contribution to the Paris Climate Agreement. The Paris Agreement states, among other things, the goal of keeping the average global temperature increase well below 2°C and sets the target of limiting further warming to 1.5°C.
To pursue the Paris Agreement's climate target, Germany has decided to achieve net zero no later than 2045, reducing GHG emissions by 95 percent compared to 1990, including an interim reduction target of 65 percent by 2030. To achieve this goal, the agri-food system and thereby supermarkets have an important role to play.

Scope 1, 2 and 3 emissions
Scope 1 includes a company's direct emissions (e.g., refrigerants) and scope 2 includes the indirect emissions from purchased energy (e.g., electricity consumption, generation of electricity not belonging to the supermarket itself). Scope 3 includes the indirect emissions of CO_2 that occur in the company's value chain from both upstream (e.g., transportation of raw materials) and downstream (e.g., food waste) sources. Scope 3 emissions can be distinguished between agriculture related emissions (referring to FLAG: forestry, land use and agriculture emissions) and industry related emissions (referring to non-FLAG: energy and industry related emissions).

By reporting and setting concrete targets, a supermarket shows that these commitments are anchored in the company policy. Supermarkets can then be held accountable for these targets.

The majority of supermarkets publish their scope 1, scope 2 and scope 3 agriculture and industry emissions

this counts

Aldi Süd, **Edeka**, **Lidl** and **Rewe** publish their emissions in scope 1, 2 and 3, and they distinguish scope 3 emissions between agriculture and industry related emissions (Aldi Süd, 2024b; Edeka, 2024a; Lidl DE, 2024a; Rewe Group, 2024). **Aldi Nord** only publishes their emissions in scope 1 and 2, and **Kaufland**[1] does not distinguish its scope 3 emissions (see figure 3) (Aldi Nord, 2023b; Schwarz Group, 2024). **Aldi Süd** has also published their scope 3 industry emissions, but those numbers concern 2020 and no update has been published since.

this counts

good step

good step

Aldi Süd is the only supermarket that publishes an overview of the emissions in scope 3 on food category level. Unfortunately this does not specify exact tons or percentages.

No climate roadmaps for how supermarkets plan to achieve net-zero targets

None of the supermarkets have a climate roadmap, describing how they will achieve their net-zero climate targets. Such a roadmap sends clear market signals in the supply chain and builds credibility for the targets. **Lidl** reports the reduction potential in scope 3 in the area of processing (approx. 25 percent), use & disposal, product range development and land management (approx. 20 percent each), and by packaging & transport or land use change (5-10 percent each) (Lidl DE, 2024a). Lidl does not clarify how they will achieve these reduction potentials.

good step

1 After the data collection period of this research, Kaufland published a Climate Balance report, in which they distinguish their scope 3 emissions between agriculture and industry related emissions.

Targets and reporting on emissions, no plans to get to net zero

Largest share of emissions occur in scope 3, Aldi Nord does not report this.

	Aldi Nord	Aldi Süd	Edeka	Kaufland	Lidl	Rewe
Reporting scope 1+2 emissions	✓	✓	✓	✓	✓	✓
Reporting scope 3 emissions	✗	✓	✓	✓	✓	✓
Distinction agriculture & industry emissions	✗	✓	✓	✗[1]	✓	✓
Insight on emission category level	✗	✓	✗	✗	✓	✗
Net zero target year	✗	2050	2045	2050	2050	2050
Interim targets (scope 1, 2 and 3)	2030 (scope 1+2)	2030	2028 (scope 1+2) and 2032 (scope 3)	2030	2030	2028, 2029, 2030
Climate roadmap	✗	✗	✗	✗	✗	✗

Only Edeka and Aldi Nord do not have an interim target on all scopes latest 2030.

Edeka is the only supermarket to adhere to the German net-zero target of 2045.

Figure 3 Supermarkets' reporting on emissions in scope 1, 2 and 3 over the past two years, and net zero targets. Scope 3 agriculture related emissions refer to the FLAG (forestry, land use and agriculture emissions) and scope 3 industry related emissions to non-FLAG (energy and industry related emissions).

1 After the data collection period of this research, Kaufland published a Climate Balance report, in which they distinguish their scope 3 emissions between agriculture and industry related emissions.

PROTEIN TRANSITION

First supermarkets set targets for the protein split in sales

KEY FINDINGS

→ Lidl is the only supermarket with a protein split target, in line with the Planetary Health Diet.

→ Aldi-Süd, Lidl and Kaufland report numbers related to the protein split. Lidl is most transparent and complete in their reporting.

→ Animal proteins account for 92 percent of all protein promotions. Almost 3 out of 4 burgers, cordon bleus and schnitzels are extra large (>150 g).

First protein split targets, limited measures to encourage plant-based

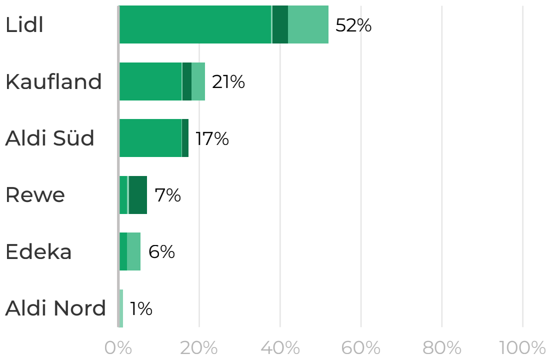

Figure 4 Efforts of supermarkets on protein transition[2] targets, promotions, portion sizes and initiatives.

Over the past decades, the consumption of animal-based proteins has risen to a level that is not sustainable, both for the environment and for people's health. The necessary shift back to a healthy balance between animal and plant-based proteins is often called the 'protein transition'. Supermarkets can influence the ratio of animal/plant proteins in their sales, for example through promotion, prices and placement in their stores.

First supermarkets set targets for the protein split in sales (EN-1.1.1)

Lidl is the first and only supermarket that has a target of 60 percent plant-based and 40 percent animal-based protein sources in 2050, in line with the Planetary Health Diet. It has also set interim targets for 2030 for the two most relevant food groups, in line with the 2050 target (Lidl DE, 2024b).

this counts

Kaufland and **Lidl** report the share of plant-based vs animal-based protein sources in their sales[3]. Lidl reports this split over their total sales, allowing society to track their progress in plant-based protein sales in the future. Kaufland only reports on part of their sales (figure 5).

this counts

Aldi Süd reports the share of plant-based and animal-based products in their sales. Supermarkets use different calculation methods and

2 After consultation with Questionmark's Scientific Council the scaling from this indicator has been slightly altered to to make the difference in performance between supermarkets more visible: the upper limit has been adjusted from 0.75 to 0.5.

3 Lidl reports on their Quantity of goods received.

report on different numbers, which makes comparison impossible. Kaufland (Kaufland, 2024) and Lidl (Lidl DE, 2024) use the WWF Protein Disclosure method (see figure 5). Aldi Süd uses its own methodology[4] (Aldi Süd, 2024a). **Edeka** does not report a protein split, but recognises its own role in the protein transition (Edeka, 2024b). Aldi Nord and Rewe do not publicly communicate about their role in this.

The protein ratio
The ideal ratio within the boundaries of planetary and human health – as proposed by EAT Lancet – is 40 percent animal-based protein, and 60 percent plant-based protein (EAT, 2019). According to the German Nutrition Society a healthy and environmentally friendly diet consists of at least 75 percent plant-based (DGE, 2024).

Best practices in other countries
In the Netherlands, all supermarkets report according to the same methodology, which makes comparison between all supermarkets possible (Questionmark, 2024b).
They report a protein split using the Protein Tracker methodology by GPA (Green Protein Alliance) and ProVeg. Based on this methodology, Dutch food retailers have set ambitious targets.

Kaufland, Lidl and Aldi Süd report share of plant-based and animal-based in sales

			Aldi Nord	**Aldi Süd**	**Edeka**	**Kaufland**	**Lidl**	**Rewe**
Method			✗	own method[4]	✗	WWF	WWF	✗
Protein split of total protein sales		Plant-based protein sources					11.6%[5]	
		Animal-based protein sources					88.4%	
Product split of total sales		Plant-based products		60%				
		Animal-based products		40%				
Protein split of specific foodgroups	Protein sources (e.g. meat, poulty, seafood, eggs, nuts and seeds, tofu, tempeh etc.)	Plant-based				8%	11.8%	
		Animal-based				92%	88.2%	
	Dairy and dairy alternatives	Plant-based				10%	6.6%	
		Animal-based				90%	93.4%	

Figure 5 Reported shares of plant-based and animal-based protein sources or products, in the sales in 2023 of Kaufland, Lidl and Aldi Süd (Kaufland, n.d.; Lidl, n.d.; Aldi Süd, 2024a).

4 The methodology of Aldi Süd divides the entire range into plant-based, animal-based and composite products, For composite products Aldi assumed 50% to be plant-based and 50% to be animal based. Aldi then calculates the ratio of plant-based to animal-based products in their total sales (excluding alcoholic beverages and mineralwater.

5 Lidl has published that, based on the incoming goods quantity in kilograms of all own-brand and branded items from the permanent and promotional range, the proportion of animal protein sources is 11.4 percent. For plant protein sources, this amounts to 1.5 percent. This means that 1.5/(1.5+11.4)=11.6% is plant-based (Lidl DE, 2024b).

Animal proteins dominate in promotions (EN-1.2.1)
On average, 92 percent of all protein products promoted in supermarkets' flyers are animal-based proteins, such as meat, fish, dairy and eggs. The other 8 percent are plant-based proteins, such as pulses, nuts and plant-based meat and dairy alternatives. All supermarkets promote on average between 91 and 93 percent animal-based proteins in their weekly flyers (figure 6). Out of all weekly flyers, Aldi Süd promoted the highest share of animal-based protein products in their flyer (week 39), namely 98 percent (see figure 7).

Best practices in other countries
In 2024, Dutch supermarkets promoted on average 81 percent animal-based and 19 percent plant-based protein products (Questionmark, 2024b) (see figure 8). In Germany, Lidl was the only supermarket that reached this ratio, only during one week. Belgian results are similar to Germany (Questionmark, 2022). A notable difference is for instance that for Lidl in the Netherlands, 20 percent of all promotions were plant-based, while for Lidl Germany this was 8 percent.

Lidl had the most plant-based friendly flyer (week 44, 19 percent plant-based), where Lidl displayed multiple pages of plant-based products only (figure 7).

Figure 7 Example of promotion flyers at Aldi Süd (left) and Lidl (right)

Less than 10% of protein promotions plant-based

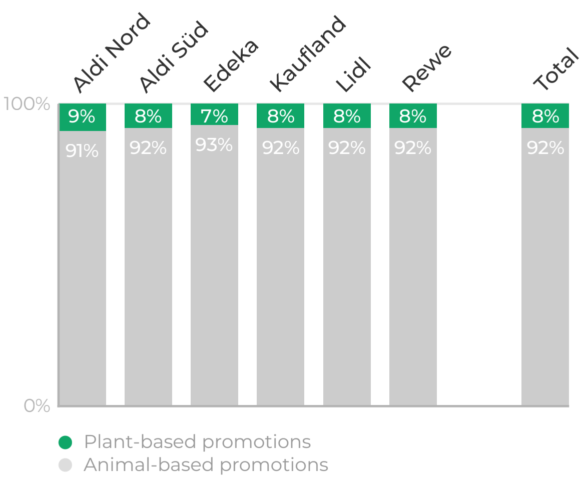

Figure 6 Animal-based versus plant-based products on promotion in weekly flyers, per supermarket.

More animal-based promotions in Germany than the Netherlands

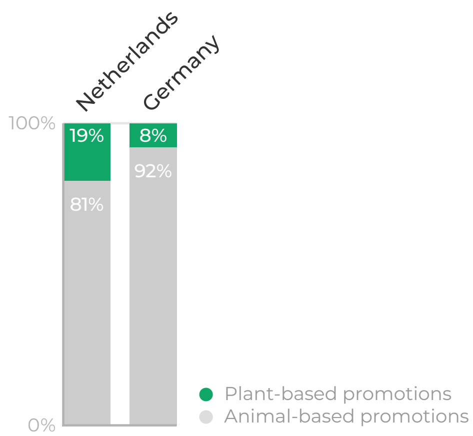

Figure 8 Comparison of plant-based versus animal-based protein promotions in Dutch and German supermarkets.

Many (extra) large portion sizes in meat assortment (EN-1.2.2)
68 percent of burgers, cordon bleus, and schnitzels are extra large portion sizes (>150g). For cordon bleus, 94 percent of all products have an extra large portion size. For schnitzels, more than 70 percent are larger than 150 grams each, and for burgers this is 61 percent. This while the German Nutrition Society (DEG) recommends to consume no more than 300 grams of meat per week (DGE, 2024).

There are some notable differences between the supermarkets (see figure 9). Aldi Nord and Edeka offer the highest share of extra large portion sizes of meat, compared to the other supermarkets, namely as much as 81 percent. **Rewe** has the lowest share of extra large portion size: 56 percent of the meat products are larger than 150 grams. Aldi Nord does not offer its customers any burgers and cordon bleus smaller than 150 grams. Aldi Nord and Aldi Süd do not provide any small portion sizes (≤80 grams).

Portion sizes create a standard
Portion sizes create an implicit consumption standard (Steenhuis, Leeuwis, and Vermeer, 2010), with larger portions unconsciously being perceived as the recommended consumption amount. This has led to an increase in the population's total food consumption (Cavanagh et al., 2014). A meta-analysis shows that doubling portion size leads to a 35 percent increase in consumption (Zlavetska, Dubelaar, and Holden, 2014).

Best practices abroad
Portion sizes are already smaller in surrounding countries, as shown by research done by Questionmark in 2022 and 2024 (Questionmark, 2024b; Questionmark, 2022) (see figure 10). In the Netherlands, 53 percent of burgers, schnitzels and cordon bleus had a portion size of 100 grams or less (Questionmark, 2024b). In Belgium, this was 30 percent (Questionmark, 2022). In Germany, this is 29 percent.

Extra large portion sizes of meat are the standard

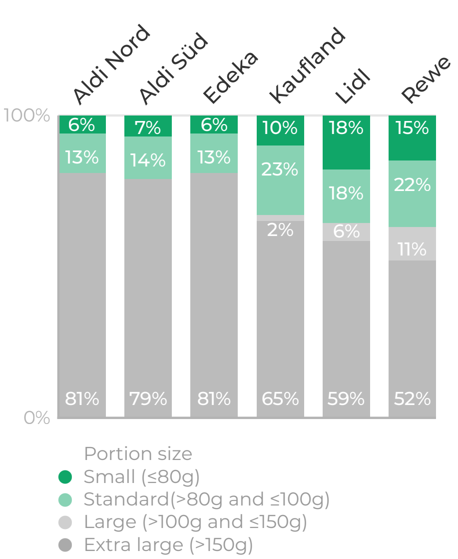

Figure 9 Average portion sizes of burgers, schnitzels and cordon bleus, per supermarket.

Larger meat portions in Germany than the Netherlands

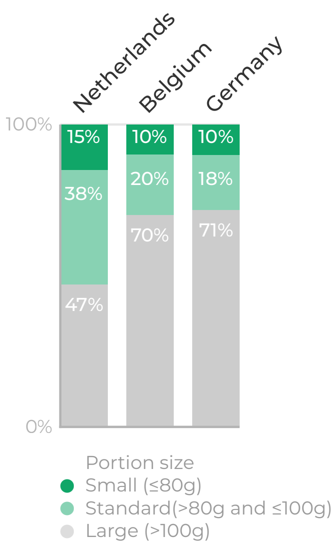

Figure 10 Comparison of average portion sizes of burgers, schnitzels and cordon bleus in Dutch, Belgian and German supermarkets.

Few initiatives to sell less animal-based products (EN-1.2.3)
Measures to encourage the transition towards a more plant-rich diet, such as placement and promotion, are still scarce in German supermarkets. **Edeka**, **Kaufland** and **Lidl** have implemented price parity: they offer plant-based alternatives for the same price as animal-based products (Edeka, 2023; Schwarz Group, 2024; Lidl DE, 2023b). Besides price parity, **Lidl** places plant-based alternatives next to animal-based counterparts for easier access (Lidl DE, 2023a).

Supermarkets take more initiatives that are worth mentioning, but they do not clearly describe the implementation, scope and/or size of these interventions. For instance **Lidl** sometimes advertises their plant-based range under the motto: “You have the choice” (in German: “Du hast die Wahl”). The advertisements show the plant-based product is available at the same price or a lower price than the animal-based product (see figure 11). **Rewe** showed climate costs for a couple of food products in some of their stores and social media channels in January 2023 (Rewe, 2023) (see figure 11). These costs reflect climate emissions and impact. Most supermarkets also mention expanding their assortment of plant-based products.

Best practices abroad
In the Netherlands there are a number of initiatives aiming to stimulate consumers to shift towards a more plant-rich diet. Dutch supermarket Jumbo has for instance completely banned discounts for fresh meat. Besides, three supermarkets provide fresh meal packages with a recommendation to create a vegetarian meal. Lidl Netherlands has even made all fresh meal packages completely vegetarian, including recipe suggestions on the packaging (Lidl NL, 2024). Various Dutch supermarkets also experiment with hybrid products consisting of meat and pulses, for example minced meat with pea protein.

Figure 11 Lidl’s “Du hast die Wahl” advertisement in flyer week 44 of plant-based range (left), and climate prices at Rewe (right) (Rewe, 2023).

SUSTAINABLE AGRICULTURE

Customers cannot rely on supermarkets for responsibly produced food

KEY FINDINGS

- Supermarkets do not have detailed action plans to stop deforestation and land conversion caused by soy production.
- All supermarkets demand suppliers to have a commitment to sourcing deforestation- and conversion-free palm oil.
- None of the supermarkets report on the share of certified vegetables, fruits, eggs, dairy, meat and fish in their sales.

Supermarkets leave the choice for sustainable purchases to consumer

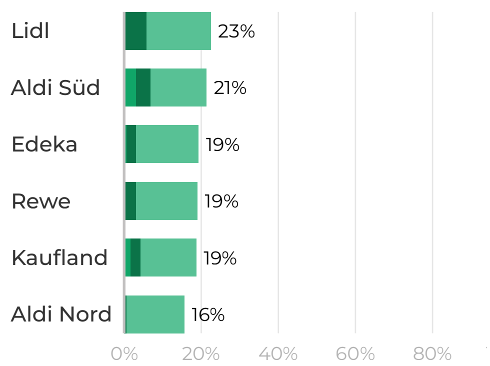

Figure 12 Supermarkets' efforts on transparency of supply chains ●, sustainably produced assortment ● and measures against deforestation and land conversion by soy ● and palm oil ●.

Supermarkets usually set high requirements for the quality and the price of products they buy from their suppliers. Supermarkets therefore have the responsibility to make sustainability an integral part of their purchase conditions.

Supermarkets often, but not always, offer a sustainable choice (EN-2.2.1)
Supermarkets shift the choice for sustainable production to their customers (see figure 13). While they often provide a sustainable option, they keep offering the unsustainable version as the standard. Supermarkets[6] have at least one product without a relevant sustainability certificate in all food categories, with the exception of black tea at Aldi Nord and Aldi Süd which all had a relevant certificate (see figure 14). For some product categories like cauliflower and iceberg lettuce, most supermarkets do not offer a single sustainable option.

6 This analysis is based on sampling from one store, randomly selected from stores with a complete assortment, as suggested by the supermarket chain. There may be differences between stores - this outcome could therefore not be fully representative for all the chain's stores.

Aldi Süd provides customers with an option to buy a sustainable product in all but two of the researched product categories, and it takes full responsibility for black tea. **Rewe** is the supermarket that offers a sustainable option in all but one of the product categories (see figure 14)[8].

Responsibility for sustainable agriculture

A supermarket can take responsibility for making agriculture more sustainable to a greater or lesser extent (see figure 13). A supermarket takes full responsibility if it incorporates certain standards in their purchasing conditions. In that case, their customers can rely on the supermarket for providing only responsibly sourced food. Other supermarkets may still offer their customers a choice of products without any guarantees: the responsibility is then on the customer.

Majority of product categories hold products with sustainability certificates

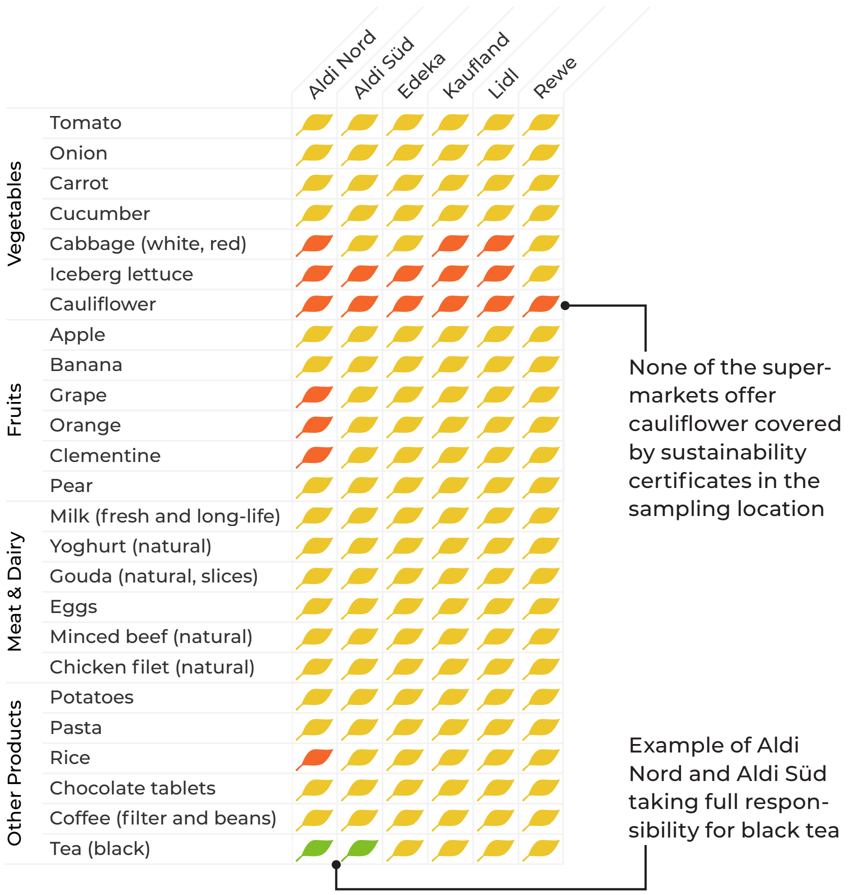

Figure 14 German supermarkets shift responsibility to buy sustainable products[7] to their customers. For an explanation of the scoring scheme, please see EN-2.2.1 in the Methodology.

Figure 13 Supermarkets' degree of taking responsibility for sustainable agriculture.

7 During data collection, peaches were not found at any of the supermarkets' sampling locations, and pork chops were missing in most. After consultation with Questionmark's Scientific Council these products, originally part of the research method, were excluded from the analysis.

8 Rewe states that a sustainable cauliflower option is available during its season, outside the data collection period. Aldi Süd states that organic cabbage was for sale, but the sampled location did not have it.

Commitments for deforestation and conversion free soy lack action plans (EN-2.3.1)
While most supermarkets aim to eliminate deforestation and conversion in their supply chains by 2025, none of them have an action plan to achieve this (see figure 15).

this counts

Aldi Süd, **Edeka**, **Kaufland**, **Lidl** and **Rewe** have committed to their soy being land and conversion free by 2025 (Aldi Süd, 2024c; Edeka, 2024; Schwarz Group, 2024; Rewe Group, 2023), meaning they avoid producing soy on land that has been converted from natural habitat. All of these supermarkets also apply 2020 as the cut-off date, deforestation thereafter will no longer be accepted. These supermarkets only accept soy from land that was already in use as arable land in 2020. **Lidl** has published that for 80 percent of soy it cannot guarantee it to be deforestation and/or conversion free, however for 20 percent it is certain due to relevant certificates. Of this 20 percent, 53 percent is even physically segregated. At **Kaufland**, 100 percent of the private label soy is covered by relevant certificates, such as Donau Soja and Proterra (Kaufland, 2023; Lidl DE, 2024a). **Aldi Nord** also reports that 19 percent of its soy is certified, however Aldi Nord does not fully specify the certificates (Aldi Nord, 2023a).

this counts

good step

None of the supermarkets have a fully-fledged action plan to tackle deforestation in its supply chains. An action plan should consist of an ambitious deforestation policy based on the Accountability Framework. This means for example, that it includes clear requirements for direct and indirect suppliers and a public grievance mechanism. Until an effective action plan is in place, the deforestation and conversion-free targets are in danger of not being met. **Lidl** is the only supermarket to have a basic escalation approach (Lidl DE, 2024b).

this counts

No action plans for commitments against deforestation caused by soy in animal feed

	Aldi Nord	Aldi Süd	Edeka	Kaufland	Lidl	Rewe
Commitment to deforestation and conversion free						
Cut-off date (2020)	✗	✓	✓	✓	✓	✓
Target deforestation-free soy (2025)	✗	✓	✓	✓	✓	✓
Supplier transparency	✗	✗	✗	✗	✗	✗
Deforestation- and conversion free soy in feed						
Share covered by relevant certificates	✗	✗	✗	100%	11%	✗
Share physically separated	✗	✗	✗	✗	9%	✗
Action plan						
Risks in supply chain identified + published	✗	✗	✗	✗	✗	✗
Action plan to address risks	✗	✗	✗	✗	✗	✗
Escalation approach	✗	✗	✗	✗	✓	✗
Member of action-oriented platform	✓*	✓*	✓*	✓*	✓	✓*

Figure 15 The extent to which supermarkets comply with multiple steps against deforestation caused by soy in animal feed.

*Because the basic score of 2 points for deforestation-free soy in animal feed is not met, this is not included in the assessment.

All supermarkets commit to sourcing deforestation- and conversion-free palm oil (EN-2.3.2)

Aldi Nord and **Süd, Edeka, Kaufland** and **Lidl** have a public commitment to sourcing deforestation- and conversion-free palm oil for their private label products, according to the WWF Palm Oil Scorecard (WWF, 2025). Rewe only has a commitment to source deforestation-free, but not conversion-free. **All supermarkets** commit to sourcing 100 percent Roundtable on Sustainable Palm Oil (RSPO) certified palm oil, and 99 to 100 percent of the palm oil volumes are RSPO certified (see figure 16).

Lidl, Kaufland and **Edeka** are leading the way in the commitment to responsible palm oil in their own supply chain. Over the last years the percentage of palm oil that is segregated/identity preserved has risen, but Aldi Nord and Aldi Süd are lagging behind.

In addition to sourcing certified palm oil, supermarkets can demand suppliers to have a commitment to sourcing deforestation- and conversion-free palm oil. **All supermarkets** do this (Rewe partially). **Aldi Nord**, **Aldi Süd** and **Lidl** also have monitoring and response systems in place to verify supplier compliance. **Lidl** is the only supermarket that has a monitoring system and policy to trace its palm oil that is purchased. Besides, supermarkets can support projects that seek to repair damage caused by deforestation. **Aldi Nord**, **Edeka**, **Kaufland** and **Lidl** are committed to this.

All supermarkets committed to sourcing deforestation-and conversion free palm oil

		Aldi Nord	Aldi Süd	Edeka	Kaufland	Lidl	Rewe
As purchaser	% certified palm oil in private label products	99%	99%	100%	100%	100%	100%
	Does the company have a public commitment on sourcing deforestation- and conversion-free (DCF) palm oil?	✓	✓	✓	✓	✓	Partially (not on conversion-free)
	Does the company expect suppliers to have a commitment on DCF palm oil?	✓	✓	✓	✓	✓	Partially (not on conversion-free)
	Monitoring system and policy to measure traceability to mills and plantation	✗	✗	✗	✗	✓	✗
Other contributions	Member of RSPO and other action oriented platforms	✓	✓	✓	✓	✓	✓
	Forest protection and restoration investments	✓	✗	✓	✓	✓	✗

Figure 16 The extent to which supermarkets comply with different steps against deforestation caused by palm oil.

Lacking transparency on agriculture practices and certification (EN-2.1.1)

this counts

Rewe is the only supermarket to give some insight into the share of certified products sold: 8 percent of Rewe's net sales value in 2022 was organic (Rewe Group, 2024). None of the other supermarkets are transparent about the certification of vegetables, fruits, eggs, dairy, meat and fish in their sales.

Some supermarkets are transparent to a certain extent regarding their assortment rather than their sales. This is not sufficient but can be seen as a first step. For example, most supermarkets report the number or share of organic products in the total assortment, e.g. 9 percent of Lidl's assortment was organic in 2023 (Schwarz Group, 2024). Lidl aims to grow its organic range to 10 percent by 2025. Most supermarkets also mention the share of certified fish products in their assortment. Besides, some supermarkets mention the share of certified products for specific food products, such as bananas.

Supermarkets do not report the shares of different cultivation methods, origins and transport methods for fruits and vegetables. Lidl does report that, since autumn 2023, no fruits and vegetables are imported by plane.

Best practices in the Netherlands
In the Netherlands, both Albert Heijn and Lidl disclose certifications, origin, cultivations and transport methods in their total sales (AH, 2023a; AH, 2023b; Lidl NL, 2023).

Reporting on sales
Transparency is the first step towards improvement. Knowledge about products' origin, cultivation, certification and transport method enables the supermarket to identify areas for improvement and to set targets.
It is important that supermarkets report on sales - not only in terms of assortment - since sales figures also reflect the effects of pricing, promotion and marketing of products.

Recommendations

Superlist Environment aims to provide insight into the extent to which supermarkets contribute to nature conservation and a healthy environment, and what steps they can take. 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 on all scopes and at emission category and food category level. Distinguish between agriculture related emissions (FLAG) and industry related emissions (non-FLAG)**
Since the far majority of emissions takes place in scope 3, reporting on this level is critical.

→ **Set up a concrete action plan, including intermediate targets to reach net-zero by 2045**
All retailers should set short-term scope 3 agriculture related emissions (FLAG) targets as soon as possible. The planned measures and their predicted reduction potential (total & proportional) must be part of the public climate plan. For example, the protein transition to a growth in sales of plant-based products can reduce total emissions significantly.[9]

PROTEIN TRANSITION

→ **Report a single-split number on the ratio of animal / plant-based proteins out of total sales annually**
Agree with all retailers on one measuring method to assure comparability between retailers in Germany and later on across countries.

→ **Set a protein split target in line with the Planetary Health Diet, combined with a concrete action plan with clear measurable policies to encourage the transition towards a more plant-rich diet**
All supermarkets should set concrete targets in line with the Planetary Health Diet in addition to reporting on the protein split. This is at least a 60/40 split by 2030 based on the ProVeg/GPA Protein tracker, or an equivalent ambition under the WWF Protein Disclose methodology. Formulate a SMART plan with policies to reach these targets.

→ **Experiment with measures to reduce the proportion of animal proteins in sales**
This can for example be done by decreasing

9 For concrete suggestions on this, we refer to the methodology.

portion sizes of meat, reducing the share of animal-based promotions, price parity between animal- and plant-based products, changing product placement and behavioural nudgings. Alongside decreasing portion sizes of meat, supermarkets could also increase the availability of large packages of plant-based alternatives to make plant-based portions cheaper per kilogram and more attractive for families and larger households. Such targets and initiatives need to be embedded in policy to ensure commitment.

- **Increase the proportion of plant-based protein promotions in the advertising leaflet**
  Add specific SMART targets to policy to increase the share of plant-based vs. animal-based proteins in the advertising leaflet.

SUSTAINABLE AGRICULTURE

- **Take responsibility for sustainable agriculture, instead of passing that responsibility on to customers**
  Make sure responsible choices are available in every product category, or preferably, avoid variants that are not covered by a certification or procurement policy.
- **Report on the certification of vegetables, fruits, eggs, dairy, meat and fish sold and on the origin, cultivation and transport method of vegetables and fruits sold**
  Measuring and reporting these numbers are essential to be able to set concrete targets for future improvement.
- **Set up an action plan to address deforestation in supply chains and to eliminate soy deforestation and conversion completely by 2025**
  An action plan should include an ambitious deforestation policy based on the Accountability Framework, including clear requirements for direct and indirect suppliers and a public grievance mechanism.
- **Make an active contribution to solving problems in palm oil cultivation**
  Enabling sustainable cultivation of palm oil in the future will require a systemic change that cannot be enforced by purchasing certified palm oil alone.
  In the agreements to combat deforestation, companies therefore have a greater responsibility than making their own sourcing more sustainable. Make an active contribution, for example: support projects that try to repair the damage caused by deforestation in the past.

RECOMMENDATIONS

Supermarket specific recommendations

Aldi Nord laggard

- **Report and set targets on all scopes and at emission category and food category level. Distinguish between agriculture related emissions (FLAG) and industry related emissions (non-FLAG) for scope 3.**
  Aldi Nord has not set a target yet to reduce scope 3 emissions. Since the far majority of emissions takes place in scope 3, reporting and setting a target on this level is critical.
- **Measure and report sales figures relevant to the protein transition (EN-1.1.1)**
  Aldi Nord should publicly recognise its own role in the protein transition and measure the share of plant-based protein in the total sales volume using the WWF Protein disclosure or the Proveg/GPA Protein tracker methodology. Report a single split and set a target in line with the Planetary Health Diet.
- **Take responsibility for sustainable agriculture (EN-2.2.1)**
  Make sure that in every product category, a sustainable option is available. Or, even better, avoid products that are not covered by a relevant certificate or sustainability programme.

Aldi Süd average

- **Start reporting one protein split, using the same methodology as the other supermarkets (EN-1.1.1)**
  It is a good step to provide insight into the plant-based and animal-based products sold. The next step is to measure the share of plant-based protein in the total sales volume using the WWF Protein disclosure or the ProVeg/GPA Protein tracker methodology. Report a single split and set a target in line with the Planetary Health Diet.
- **Take ambitious, measurable initiatives to stimulate the transition towards a more plant-rich diet (EN-1.2.1 & EN-1.2.3)**
  For example, increase the offer of plant-based protein products and decrease the offer of animal-based protein products in the weekly leaflet and. Also look at the other supermarkets' example of embedding price parity in the company's policies, or think about placing meat alternatives next to the animal-based product and embed this in policy.
- **Report on the share of certificates, and on the origin, cultivation and transport method of fruits and vegetables in sales (EN-2.1.1)**
  Knowledge about products' origin, cultivation and transport and whether or not products are certified enables the supermarket to try and increase its sales of sustainable products.

Edeka average

- **Measure and report sales figures relevant to the protein transition (EN-1.1.1)**
  Measure the share of plant-based protein in the total sales volume using the WWF Protein Disclosure or the ProVeg/GPA Protein tracker methodology. Report a single split and set a target in line with the Planetary Health Diet.
- **Reduce the portion sizes of meat products (EN-1.2.2)**
  Avoid meat products that have a portion size of 150 grams or more. Make sure to offer customers a product with a small portion size (≤80 grams) in every meat category. For burgers, no small portion sizes were found at Edeka.
- **Take ambitious, measurable initiatives to stimulate the transition towards a more plant-rich diet (EN-1.2.3)**
  For example, look at the other supermarkets' example of price parity, or think about placing meat alternatives next to the animal-based product. Besides, while Edeka mentions the price parity policy, Edeka also mentions that "meat, sausages, milk and dairy products are also part of a balanced diet". Make sure stimulating a plant-rich diet is the focus and avoid any communication that contradicts this.

Kaufland average

- **Report on scope 3 emissions and make a distinction between agriculture (FLAG) and industry (non-FLAG) related emissions (EN-3.1.1)**
  Currently Kaufland only gives insight into scope 1 and 2 emissions through Schwarz Group. Since the far majority of emissions takes place in scope 3, reporting on this level is critical.
- **Reduce promotions for animal-based proteins (EN-1.2.1)**
  Reduce promotions for animal protein sources such as meat, (shell)fish and dairy/cheese. Instead, promote plant-based protein sources such as protein rich vegetables and plant-based meat and dairy alternatives.
- **Take responsibility for sustainable agriculture (EN-2.2.1)**
  Make sure that in every product category, a sustainable option is available. Or, even better, avoid products that are not covered by a relevant certificate or sustainability programme.

Lidl front-runner

- **Take responsibility for sustainable agriculture (EN-2.2.1)**
  Make sure that in every product category, a sustainable option is available. Or, even better, avoid products that are not covered by a relevant certificate or sustainability programme.
- **Reduce promotions for animal-based proteins (EN-1.2.1)**
  Reduce promotions for animal protein sources such as meat, (shell)fish and dairy/cheese. Instead, promote plant-based protein sources such as protein rich vegetables and plant-based meat and dairy alternatives.
- **Report on the share of certificates, and on the origin, cultivation and transport method of fruits and vegetables in sales (EN-2.1.1)**
  Knowledge about products' origin, cultivation and transport and whether or not products are certified enables the supermarket to try and increase its sales of sustainable products.

Rewe average

- **Measure and report sales figures relevant to the protein transition (EN-1.1.1)**
  Measure the share of plant-based protein in the total sales volume using the WWF Protein Disclosure or the ProVeg/GPA Protein tracker methodology. Report a single split and set a target in line with the Planetary Health Diet.
- **Take ambitious, measurable initiatives to stimulate the transition towards a more plant-rich diet (EN-1.2.3)**
  Take an example from other supermarkets embedding price parity in the company's policies, or think about placing meat alternatives next to the animal-based product and have this embedded in policy.
- **Report on the share of certificates, and on the origin, cultivation and transport method of fruits and vegetables in sales (EN-2.1.1)**
  Knowledge about products' origin, cultivation and transport and whether or not products are certified enables the supermarket to try and increase its sales of sustainable products.

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Colophon

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Initiative and implementation
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