

Superlist Environment Europe 2026



Promising climate roadmaps, but
no strong emission reductions

Edition 1, January 2026

SUPER
LIST



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Foreword



Charlotte Linnebank
General Director
Questionmark

Questionmark

Supermarkets hold tremendous influence over what ends up on our plates and, ultimately, the health of our planet. With Superlist, we at Questionmark want to help ensure that this influence is used for good: by measuring, comparing, and motivating supermarkets to accelerate the transition toward a more sustainable and plant-rich food system. This first-of-its-kind European benchmark spans eight countries and assesses 27 major supermarkets. With it, we aim to build momentum in each country and spark a healthy sense of competition across borders – that drives supermarkets to take meaningful, transparent action.

I'm deeply grateful to our partners – WWF Netherlands, ProVeg International, and Madre Brava – for sharing this mission and for their trust and collaboration. I also want to thank the members of our Scientific Council for their guidance and expertise, and the supermarkets involved for their contributions. Thanks to all of them, our team was able to deliver an evidence-based assessment of where supermarkets stand today, and what it will take to close the gap between ambition and real-world impact.

It's inspiring to see more and more supermarkets stepping up on climate and protein. Still, the gaps between ambition and action remain wide, and tangible emission reductions are yet to come. My hope is that in the near future, Europe's supermarkets will turn their commitments into visible progress – and lead the way toward a food system that truly sustains people and the planet.



Corné van Dooren
Senior Advisor
Sustainable Diets
WWF-NL

World Wide Fund for Nature Netherlands (WWF-NL)

At WWF, we are committed to ensuring that healthy diets go hand in hand with a thriving planet. Yet nature and climate are under severe pressure, and our current food system is one of the biggest drivers of crossing planetary boundaries. European supermarkets have a pivotal role to play: they are central actors in food chains and key enablers of the sustainability transition. As major buyers and sellers of animal-based products, their decisions on product assortments, promotions, and pricing strongly shape consumer choices- and ultimately the carbon footprint of our diets.

Many European retailers have now set targets for reducing greenhouse gas emissions and for shifting towards more plant-based protein consumption. This report aims to bring greater transparency to those commitments and to the progress being made. By highlighting this transparency and showcasing positive examples, we hope and expect to inspire others in the market, and to help keep frontrunners on track to achieving the 2030 climate and protein-shift targets.



Nico Muzi
Co-Founder and
Chief Programmes
Officer
Madre Brava

Madre Brava

In Europe, we need to eat more fruit, vegetables and legumes, and less meat, cheese and animal fats. So says the Planetary Health Diet, the latest global scientific consensus on healthy and sustainable diets.

Supermarkets largely determine what food is produced and how, so they have both the responsibility and power to make that healthy and sustainable food – in short, good food – the easiest choice for shoppers.

Beyond the climate and health benefits, selling more plants and fewer animal products is also good business for supermarkets: it lowers costs and could increase profits. And it's good for consumers: plant-rich diets are cheaper, helping cash-strapped consumers eat more healthily.

The Superlist Environment Europe is the only European benchmark that assesses supermarkets' efforts to rebalance protein sales as a key measure to achieve human and planetary health goals. It tells a clear and simple story: sustainability, health and profits can go hand in hand.

Those supermarkets who have not scored so well must catch up and take responsibility for the food they sell to their customers.



Joanna Trewern
Global Partnerships
Director
ProVeg International

ProVeg International

This first multi-country Superlist confirms what our work at ProVeg International has long shown: plant-rich diets are crucial to reaching climate goals. The report also reinforces that now is the time to transform ambition into action. However, Europe's food system is at a crossroads. Traction is growing in protein diversification, but so far, only a few leading companies have committed to the concrete targets and roadmaps we need for healthy, sustainable diets.

At ProVeg, we see supermarkets not just as market players, but as vital change agents that hold the key to reshaping food environments and consumer norms to reflect a future that's better for people, animals, and the planet. Real transformation will come when climate ambition, protein diversification, and supportive policies converge, driving the systemic change that is needed.

Through initiatives like Superlist, we aim to turn first steps into real momentum: empowering all retailers to adopt clear protein diversification targets, reimagine their role in the food transition, and unlock the commercial opportunities of sustainable diets. The path is clear; now it's time for Europe's retailers to lead it.

Introduction

Supermarkets play a crucial role in our daily lives and are an indispensable part of society. European consumers purchase about 70 per cent of their daily food from supermarkets (1). 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 promote sustainable diets among their customers. The powerful market position of supermarkets, along with their concentration in a few, often multinational companies in each country, gives them exceptional leverage within the food system.

What is Superlist?

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

Superlist aims to reveal the extent to which supermarkets contribute to a healthy, sustainable and fair food system, and to enable supermarkets to compare their sustainability efforts with competitors' and learn from best practices and recommendations. The programme is carried out in national-level projects that alternate between three themes: health, environment and human rights. Within Superlist Environment, the specific topics are typically climate, sustainable agriculture and aquaculture, and packaging.

About Superlist Environment Europe

Superlist Environment Europe is a Questionmark project in collaboration with civil society partners WWF Netherlands, Madre

Brava and ProVeg International, and with the support of ambassadors Changing Markets, Climate Action Network, PAN DACH, RoślinieJemy, Spanish Vegetarian Union and The Food Foundation.

The Superlist Environment Europe project is the first to deliver benchmarks for eight countries and an overview benchmark simultaneously. This edition covers the 20 largest European supermarkets, along with their main competitors in their home markets, for a total of 27 supermarkets across eight European countries. This edition of Superlist Environment focuses on climate plans and the protein shift.

The [methodology](#) for this research was published on 22 May 2025 after consultation with Questionmark's Scientific Council and civil society partners WWF Netherlands, Madre Brava and ProVeg International. Supermarkets within scope were informed about the methodology, and some were consulted on earlier versions. Data for this research was collected by Questionmark between 16 June and 25 July 2025.

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

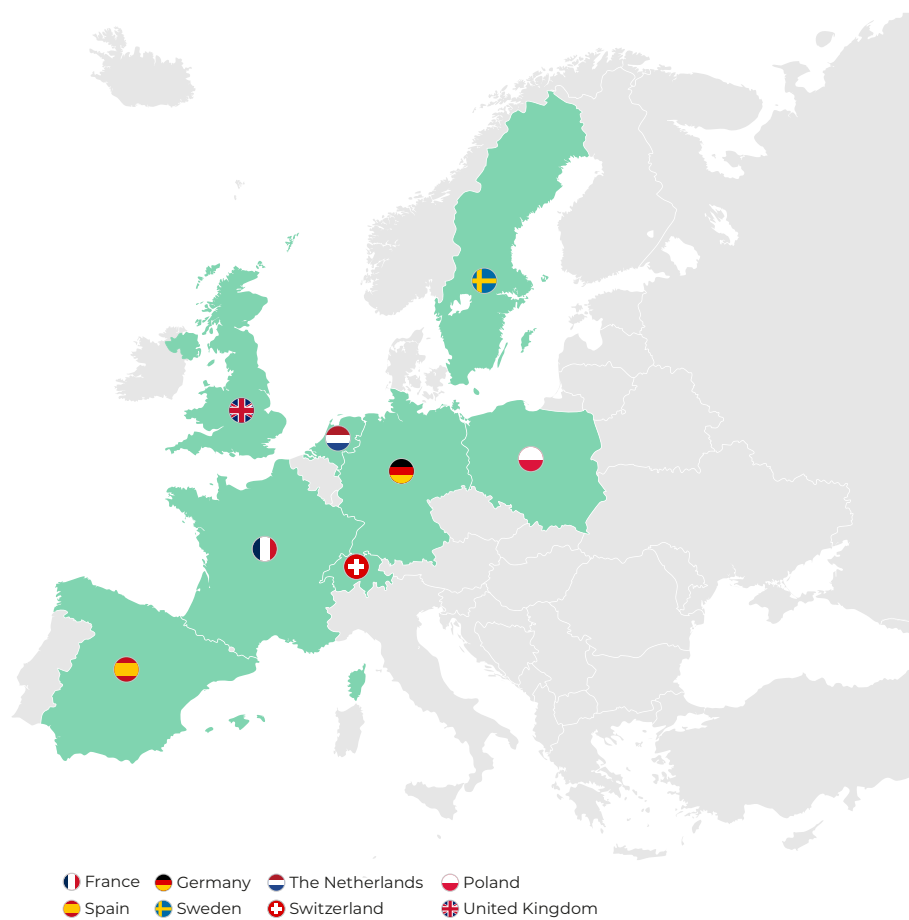
Reading guide

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.



Countries assessed in Superlist Environment Europe 2026



Promising roadmaps, but no strong emission reductions

Supermarkets' engagement in climate action is essential, as over a quarter of human-caused emissions come from the food system (2). Among food products, animal-based products contribute the most to global warming (3). Therefore, rebalancing the proportion of protein in supermarkets' sales is a key element in developing a robust climate strategy.

Superlist Environment Europe 2026 is the first benchmark to compare top European supermarkets on their contribution to a sustainable food system using methods that prominent supermarkets employ to track their progress.

SUMMARY OF THE FINDINGS

→ It is crucial that supermarkets publish detailed roadmaps outlining how they intend to meet the Paris Agreement. **Seven supermarkets have developed detailed roadmaps to reduce emissions in the near term:** Albert Heijn (NL), Carrefour (ES and FR), and Lidl (DE, ES, NL and PL). This reflects meaningful progress, though more clarity is needed to verify whether the targets in their plans are fully aligned with the Paris Agreement's ambition of limiting further global warming to 1.5 °C. Most importantly, the remaining 20 supermarkets must still develop and publish detailed climate roadmaps.

→ Achieving emission reductions and reporting progress towards targets are key to contributing to the Paris Agreement. Five supermarkets have already reduced their total emissions since they began reporting. **However, the emissions of many other European supermarkets are still rising or do not show a clear decline yet over the past few years.** For some, it is impossible to assess whether their emissions are rising or falling, as they do not report their full emissions annually in a complete and comprehensive manner.

→ Rebalancing protein consumption is essential to reduce indirect emissions from Scope 3. **Two-thirds of supermarkets acknowledge their role in shifting towards more plant-rich diets by including the reduction of animal-protein sales in their climate plans.** Half of them are leading the protein transition by setting measurable and near-term targets to increase the share of plant-based protein sales¹. However, nine supermarkets make no mention of the shift towards plant-rich diets as a means of reducing emissions.

EUROPEAN OVERVIEW

Ranking Superlist **Environment** Europe 2026

Which supermarkets are aligning their climate plans with the Paris Agreement and rebalancing protein sales towards more plant-rich diets?

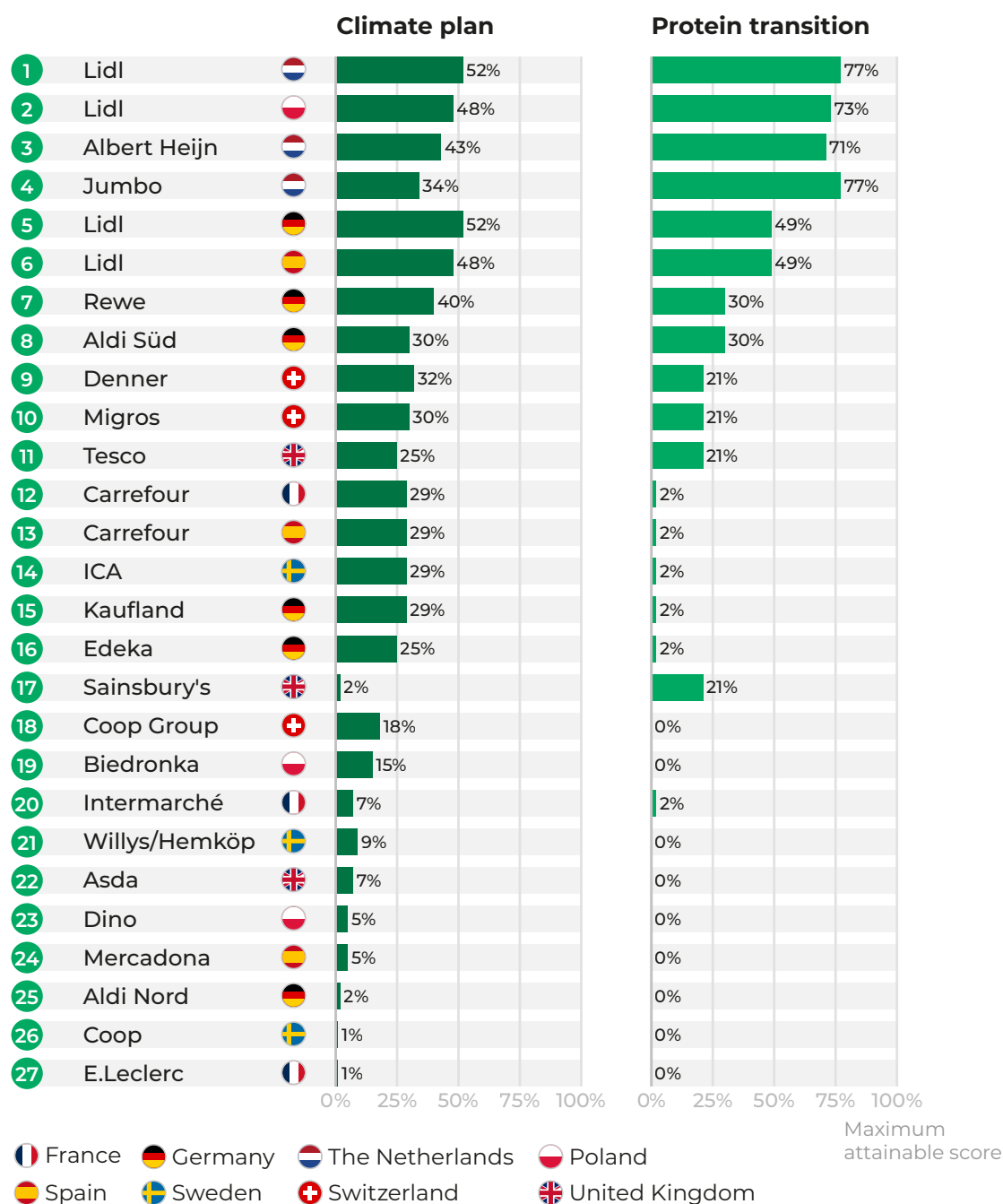


Figure 1 Ranking of 27 leading supermarkets in Europe.^{2,3}

² Scoring is based on the Superlist Environment methodology published [here](#).

³ Due to the lack of published data at national level, some supermarkets' assessments are based on the policies of their group companies.

Findings

CLIMATE PLAN

First roadmaps are promising

Seven supermarkets have publicly disclosed a detailed climate roadmap.



Albert Heijn (NL), Carrefour (ES & FR), as well as **Lidl (DE, ES, NL and PL)** are the first supermarkets in Europe to publish a detailed and actionable roadmap to achieve their near-term reduction targets (see 'near-term target' in the [Glossary](#)). These roadmaps include concrete measures aimed at achieving their target, each with a quantified contribution to the overall reduction target. Most importantly, the remaining 20 other supermarkets need to develop and publish detailed roadmaps that translate their Scope 3 targets into quantified emission reduction measures (see 'Direct and indirect emissions' in the [Glossary](#)). These roadmaps should align with the Paris Agreement.

A total of 19 supermarkets have set near-term reduction targets.

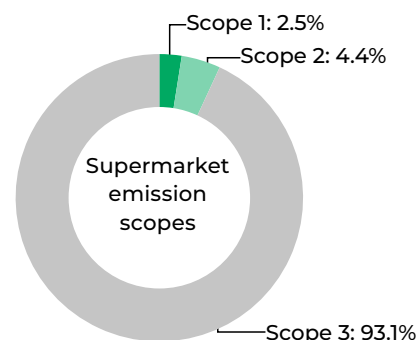
Setting a near-term target is an important first step towards developing a detailed climate roadmap aligned with the Paris Agreement. Eighteen supermarkets with near-term targets to reduce FLAG emissions are aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C (see 'Direct and indirect emissions' and 'Target validation by the Science Based Targets initiative (SBTi)' in the [Glossary](#)). However, seven supermarkets have not yet set near-term targets to reduce Scope 3 emissions. Prioritising target-setting to reduce Scope 3 emissions is crucial, as these emissions make up approximately 90 per cent of a supermarket's carbon footprint

Seven supermarkets explicitly integrate financial support to suppliers in their climate plan to address indirect emissions.

While most supermarkets offer support to suppliers through training and online learning tools, direct investment in supply chains and financial support for implementing sustainable practices are even more important to achieve reductions in total emissions. The first supermarkets to integrate such measures into their climate plans are **Albert Heijn (NL), Jumbo (NL), Lidl (NL and DE), Migros (CH), Rewe (DE) and Tesco (UK)**. Tackling indirect Scope 3 emissions is particularly important, as they account for approximately 90 per cent of the total greenhouse gas (GHG) emissions of supermarkets. Ensuring a just transition towards a sustainable food system requires sharing the financial burden of this transition across the entire value chain.



Supermarkets: scope 3 accounts for the majority of emissions



- Scope 1** Direct emissions from supermarkets' operations.
- Scope 2** Emissions from the generation of electricity and heat that supermarkets purchase.
- Scope 3** Emissions from, for example, agriculture, food processing, waste, and transport upstream, as well as transport, consumption, and waste downstream.

Source: McKinsey, 2022

PROGRESS

Emissions reductions weak, despite promising individual efforts

More than ten supermarkets have reported an increase in total emissions compared to their respective baselines.

Reporting progress towards targets and realising actual emission reductions are key to contributing to the Paris Agreement's ambition to limit global warming to 1.5 °C. Five supermarkets have achieved a reduction in their total emissions over the past couple of years: **ICA (SE), Jumbo (NL), Kaufland (DE), Migros (CH) and Rewe (DE)**. Despite this encouraging observation, the significance of these reductions remains uncertain, as none of the supermarkets report a decrease greater than

11 per cent, their baseline years differ, and none provide detailed explanations of how the reductions were achieved. Remarkably, none of these supermarkets has published a detailed climate roadmap. Moreover, emission reductions from previous years are often recalculated based on new insights, definitions, and scope. Sometimes, supermarkets need to correct their previously reported emissions in later disclosures. As a result, conclusions about increases or decreases in emissions may need to be revised over time. What is clear, however, is that the sector as a whole has not yet demonstrated a consistent downward trend in emissions.



EMISSIONS REPORTING

Most supermarkets report emissions, though the level of detail varies

Almost all supermarkets report their current carbon footprint in some form.

However, the level of detail varies significantly. A total of 22 supermarkets break down their emissions into scopes, with indirect emissions from Scope 3 accounting for approximately 90 per cent or more of the total emissions of supermarkets (see 'Direct and indirect emissions' in the [Glossary](#)). Half of the supermarkets provide further insight into their indirect Scope 3 emissions by distinguishing between agriculture- and industry-related emissions. Notably, **Albert Heijn (NL)** is the first supermarket to report methane emissions and to have set a specific reduction target, an important development given that methane is the second most harmful greenhouse gas (4,5). In contrast, E.Leclerc (FR) and Mercadona (ES) report only their total emissions without distinguishing at the scope level, while Aldi

Nord (DE), Coop (SE) and Sainsbury's (UK) report only a portion of their emissions. These supermarkets must begin reporting all emissions in detail to ensure transparency about their progress against targets, their emission sources, and thus the levers for reduction.

Eight supermarkets publish their agriculture-related emissions by food category.

Quantifying and reporting these emission sources is a crucial step in developing a concrete emission-reduction plan. Supermarkets that already provide this level of detail include **Albert Heijn (NL), Denner (CH), ICA (SE), Lidl (DE, ES, NL, PL) and Migros (CH)**. The reported data confirm that animal proteins have the largest carbon footprint of all food categories, highlighting the need for a transition to more plant-rich diets.



PLANT-RICH DIETS

Few supermarkets are leveraging plant-based foods to reduce emissions

A third of the supermarkets do not address the sales of animal protein.

This is remarkable, given that animal protein is the primary source of agriculture-related greenhouse gas emissions in supermarkets. It is essential for these supermarkets to integrate the rebalancing of protein sales into their climate plans to reduce indirect Scope 3 emissions. To help keep the food system within planetary boundaries, the average diet would need to consist of 74 per cent plant-based foods and 26 per cent animal-based foods by 2050 across all food groups (see 'Rebalancing protein sales to tackle climate change' in the [Glossary](#)) (6,7). This split would be 60:40 when considering only protein-rich food groups (see 'Measuring the Protein Split' in the [Glossary](#)). Nine supermarkets either do not mention this shift towards plant-rich diets as a means of reducing emissions or do not yet consider it their responsibility to support this transition through their sales: Aldi Nord (DE), Asda (UK), Biedronka (PL), Coop (CH and SE), Dino (PL), E.Leclerc (FR), Mercadona (ES) and Willlys/Hemköp (SE).

Twelve supermarkets have begun reporting their protein split.

Eight of the 12 supermarkets report their split across total sales. Four of the 12 supermarkets report their split only in two specific categories: 'protein-rich' and 'dairy and dairy alternatives'. Five of the 12 supermarkets report both in total sales and in protein-rich categories. The protein split is the ratio of plant-based versus animal-based proteins or foods in the sales volume (see 'Measuring the Protein Split' in the [Glossary](#)). It is the key metric for supermarkets to monitor this source of indirect Scope 3 emissions. Nevertheless, it is essential for the 15 other supermarkets to start reporting their protein split across total sales, and in the protein-rich food groups.

Eight supermarkets have published a protein target, and another four have set targets in line with planetary boundaries.⁴

The supermarkets that set targets in line with the Planetary Health Diet are **Albert Heijn (NL)**, **Lidl (NL and PL)** and **Jumbo (NL)**. The three Dutch supermarkets aim for a share of 60 per cent plant-based proteins in total sales by 2030. **Lidl (DE, ES and PL)** has also set targets to increase the share of plant-based products in its total sales by 20 per cent by 2030. **Rewe (DE)** aims for 60 per cent by 2035 and **Denner (CH)** aims for 50 per cent by 2040. The baseline for these targets at Lidl (DE and ES) has not been published, making it impossible to confirm whether they are in line with the Planetary Health Diet. Nevertheless, based on their respective 2024 protein split, **Lidl (DE and ES)** is expected to reach a protein split within the planetary boundaries as set by the Planetary Health Diet by 2050.

Three supermarkets have set targets to grow the sales of plant-based proteins. These

are **Carrefour (ES and FR)** and **Tesco (UK)**, but they do not appear to have the ambition to reduce the sales of animal protein. For an effective protein transition, supermarkets should not only increase the sales of plant-based foods; the goal is to decrease the sales of animal proteins.



⁴ It is important to note that the protein splits and targets are not directly comparable because of the use of two different methodologies, see 'Rebalancing protein sales to address climate change' in the glossary for the explanation about the protein split needed to meet the Planetary Health Diet.

Recommendations

This chapter presents sector-wide recommendations, in addition to the supermarket-specific recommendations in each country chapter, to support supermarkets in contributing to a more sustainable food system. The recommendations below apply to all supermarkets assessed in *Superlist Environment Europe 2026*.

CLIMATE PLAN

→ Set near-term reduction targets covering the total carbon footprint, as well as a separate target for Scope 3 emissions.

A Scope 3 target is essential because it represents the vast majority of supermarkets' emissions. Targets should be set for 2035 at the latest to tackle current emissions and ensure accountability towards achieving net zero by 2050, as determined by the European Union, Switzerland and the United Kingdom. The target should be aligned with the Paris Agreement's ambition to limit further global warming to 1.5°C. Then develop and publish a roadmap to reach the near-term targets. The roadmap should outline specific reduction measures, each with a quantified contribution to the target. This ensures a robust and transparent roadmap for meeting targets.

→ Give priority to emission reduction measures with the highest expected effect on the short term to achieve a reduction in total emissions.

Key areas include rebalancing proteins, as well as transport in supply chains, the use of sold products and the end-of-life treatment of sold products (e.g via reducing product packaging). In addition to offering supplier support through training and online tools, supermarkets need to invest directly in their supply chains and provide financial support to enable sustainable practices.

→ Report indirect Scope 3 emissions

annually in detail. The emissions should be broken down by FLAG and non-FLAG sources at the food-category level (eg meat, dairy, fruit and vegetables, drinks). This level of granularity enables the transparent tracking of progress towards near-term reduction targets and facilitates comparison between supermarkets.

PROTEIN TRANSITION

→ Include the protein transition in the climate plan as a key lever to reduce indirect Scope 3 emissions.

This strategy is particularly important for lowering FLAG-related Scope 3 emissions, as animal products account for half of emissions across all food products.

→ Measure and disclose protein splits annually.

- The share of plant-based proteins or products in total sales volume or total volume of purchased goods, as defined in The Protein Tracker and WWF Planet-Based Diets retail methodology (7, 8).
- The share of plant-based proteins or products in the protein-rich categories. By reporting the split in the 'Plant-based Core' and 'Animal Core' as defined in The Protein Tracker, or reporting the split in the 'protein-rich' category and the 'dairy and dairy alternatives' category, as defined in the WWF Planet-Based Diets retail methodology.

→ Set measurable, time-bound targets to increase the share of plant-based protein sales and decrease animal protein sales.

The targets should, at a minimum, cover protein-rich categories, and ideally also cover total sales volume across all food categories. All targets should be aligned with the Planetary Health Diet as defined by the EAT-Lancet framework.



FRANCE

French supermarkets, among the largest in Europe, lag behind on climate plans and the protein transition

KEY FINDINGS

→ Climate roadmap

Carrefour is the only supermarket in France with a published roadmap to reach its near-term targets. E.Leclerc and Intermarché's⁵ climate plans are not yet concrete.

→ Progress

Carrefour France and Intermarché's total GHG emissions have increased since they started reporting. E.Leclerc's progress is unknown, as only 2023 emissions have been reported.

→ Protein transition

Carrefour France and Intermarché acknowledge the importance of the protein transition in reducing emissions. E.Leclerc does not have the rebalancing of protein sales on its agenda.

Superlist Europe Environment 2026 – France

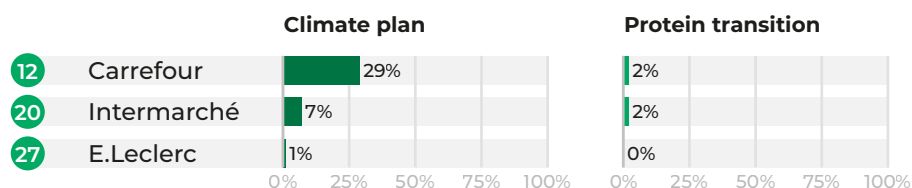


Figure 3 Ranking of three supermarkets in France, according to their policies on greenhouse gas emissions and plant-rich diets.

THE FRENCH MARKET

Market size

Third largest among the eight markets assessed in this report (9, 10).

Supermarkets reported

Carrefour France
E.Leclerc
Intermarché

Total market share

64%

CLIMATE PLAN

Roadmaps

Carrefour published the most comprehensive climate plan in France. The supermarket set near-term reduction targets covering all scopes for 2030, including specific targets to reduce FLAG and non-FLAG emissions in Scope 3 by 2030. To achieve these targets, **Carrefour France** has developed a roadmap outlining the expected emission reduction per measure. It is necessary for E.Leclerc and Intermarché to develop and publish detailed roadmaps to achieve near-term targets and ensure they are in line with the Paris Agreement.



E.Leclerc's and Intermarché's climate plans are not yet concrete. Both supermarkets are

working on developing their climate plans aligned with the Paris Agreement. **E.Leclerc** has set a near-term reduction target, aiming to decrease its emissions by 50 per cent by 2035. However, Intermarché has not yet set a near-term reduction target for its indirect Scope 3 emissions. Prioritising target-setting is crucial, as Scope 3 emissions account for about 90 per cent of a supermarket's carbon footprint. Moreover, it is important for these supermarkets to set targets between now and 2035 to ensure immediate action to reduce emissions.



None of the French supermarkets are explicitly committed to being net-zero companies by 2050. The supermarkets acknowledge

the need to reduce their emissions, given the commitment of the EU and the French government to reach net zero by 2050. Carrefour France has made a net-zero commitment for 2040; this applies solely to its Scope 1 and 2 emissions, which represent about 10 per cent of total emissions. It is essential for supermarkets to commit to becoming net-zero companies by 2050 to align their climate plans with the goals of the EU and the French government. This is needed to ensure a coordinated transition.

Progress

Carrefour France and Intermarché's total carbon footprints have increased since their respective baselines. Both supermarkets have managed to reduce their Scope 1 and 2 emissions; however, these reductions have not been sufficient to compensate for the increase in indirect Scope 3 emissions. Despite a slight decline between 2023 and 2024, Carrefour France's Scope 3 emissions have increased overall since its baseline. Similarly, Intermarché's Scope 3 emissions have continued to rise since reporting began. E.Leclerc's progress is unknown, as the supermarket has only published its total emissions for 2023. With near-term target deadlines approaching, reporting progress towards targets and achieving actual emission reductions are crucial to contributing to the Paris Agreement's ambition to limit global warming to 1.5 °C. Moreover, none of the French supermarkets provide financial support to suppliers to implement sustainable farming practices to reduce their emissions. In fact, direct investment in supply chains and financial support for implementing sustainable practices are necessary to reduce total emissions.

Carrefour France, E.Leclerc and Intermarché report their carbon footprints with limited insight. Carrefour France and Intermarché

report emissions per scope. However, none of the supermarkets report FLAG and non-FLAG emissions in Scope 3 separately for the last two years. Most importantly, it is essential for E.Leclerc to start reporting emissions annually and by scope. It is necessary for supermarkets to start reporting a breakdown of emissions by scope as well as FLAG and non-FLAG emissions by category, to increase transparency about emission sources and identify levers for reduction.

PROTEIN TRANSITION



Carrefour France integrates the protein transition into its 2030 climate roadmap.

Carrefour France has quantified the emission reduction expected from its protein transition strategy for reaching its 2030 emission reduction target. It takes into account substituting 30 per cent of animal proteins with plant-based ones to achieve a 3 per cent emission reduction in Scope 3. Nevertheless, this is not an explicit commitment to rebalance proteins in sales, because Carrefour France's protein transition target is to reach €650 million in turnover from plant-based protein substitutes by 2026, in collaboration with major A-brands. This target does not include reducing sales of animal proteins. The supermarket gives the following examples of measures it will implement to reach this target: product innovation, extending the plant-based product range and engaging stakeholders by signing a food transition pact.

Intermarché acknowledges the importance of the protein transition in reducing emissions. Intermarché aims to grow its

plant-based product range and stimulate its sale by increasing shelf space, as well as placing these products next to their animal equivalents. Intermarché reports the sales performance of plant-based substitutes, as well as the share of plant-based products in its assortment of dairy, fresh products and fresh ready-to-eat meals. In addition, **Intermarché** states that it monitors the share of animal proteins in its sales to measure the carbon footprint of these products using a method called OEFSR, but it has not yet publicly disclosed these numbers.



E.Leclerc does not yet acknowledge its role as a supermarket in the rebalancing of proteins in sales.

The supermarket focuses on expanding its range of plant-based products to meet the growing demand for them. However, E.Leclerc does not show the ambition to increase the sales of plant-based proteins or reduce those of animal proteins. Rebalancing protein sales is a crucial strategy that supermarkets should adopt to reduce the consumption of animal products and help keep the food system within planetary boundaries.

How do French supermarkets perform compared to other European supermarkets?

Carrefour France is among the seven supermarkets in Europe with a roadmap to achieve its near-term target. Although Intermarché and E.Leclerc have started reporting emissions, they are among the seven supermarkets in Europe without a near-term target. Both supermarkets report that they are currently working on publishing their respective climate plans. Nevertheless, tackling emissions reductions remains essential to limit further global warming to 1.5 °C, making it urgent to set concrete targets and to develop and publish a roadmap accordingly.

Transparency in the emission reporting of French supermarkets is lacking compared

with about half of the other European supermarkets, which publish a breakdown of Scope 3 emissions into FLAG and non-FLAG.

French supermarkets are among the 16 supermarkets that do not publish their protein split based on sales. Although Intermarché reports some measures to increase the sales of plant-based proteins and Carrefour France includes the protein transition in its climate roadmap, they do not explicitly include an essential component: reducing the share of animal proteins in sales to rebalance protein consumption. Both supermarkets are among the 18 acknowledging their role in the transition.

Supermarket-specific recommendations

Carrefour France

In European ranking: 12/27



- Report FLAG and non-FLAG emissions annually to identify the largest sources of emissions and align the roadmap accordingly. It is also crucial to track and report progress towards the near-term target.
- Provide financial support to all suppliers to help reduce indirect Scope 3 emissions across all value chains.
- Further integrate the protein transition into the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Intermarché

In European ranking: 20/27



- Set a near-term target for 2035 at the latest to reduce Scope 3 emissions in line with the Paris Agreement. Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 target into quantified emission-reduction measures.
- Report emissions annually, by scope and by source (ie FLAG and non-FLAG). This is a necessary step in setting a concrete climate plan. It is also crucial to track and report progress towards the near-term target.
- Further integrate the protein transition into the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

E.Leclerc

In European ranking: 27/27



- Set a near-term target for 2035 at the latest to reduce Scope 3 emissions in line with the Paris Agreement. Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 target into quantified emission-reduction measures.
- Report emissions annually, by scope and by source (ie FLAG and non-FLAG). This is a necessary step in setting a concrete climate plan. It is also crucial to track and report progress towards the near-term target.



GERMANY

Lidl Germany, Rewe and Aldi Süd are among the leaders in Germany and Europe

KEY FINDINGS

→ Climate roadmap

Lidl Germany is the first German supermarket with a published, detailed roadmap to reach its emission-reduction targets.

→ Progress

Since they started reporting, Kaufland and Rewe have decreased their total emissions. Aldi Süd, Edeka, and Lidl Germany's total emissions have increased. Yet, meeting the Paris Agreement is not in sight.

→ Protein transition

Lidl Germany continues to disclose its protein split annually. In 2024, Aldi Süd and Rewe reported their protein split across all food groups for the first time, while Kaufland did not publish its data for 2024.

Superlist Europe Environment 2026 – Germany

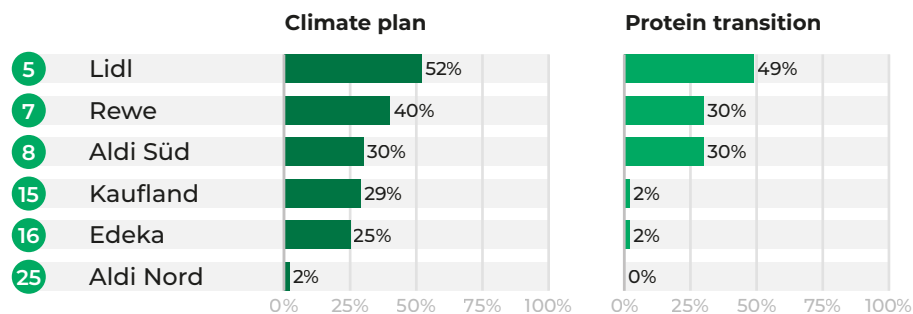


Figure 3 Ranking of six supermarkets in Germany, according to their policies on greenhouse gas emissions and plant-rich diets.

THE GERMAN MARKET

Market size

The largest food retail market out of the eight European countries assessed in this Superlist (9,11).

Supermarkets reported

Aldi Nord, Aldi Süd, Edeka, Kaufland, Lidl Germany and Rewe. Several of Europe's largest supermarkets are headquartered in the country.

Total market share

75%

CLIMATE PLAN

Roadmaps



Lidl Germany is the first German supermarket with a published, detailed roadmap to reach its emission-reduction targets.

The supermarket has a roadmap for its 2034 target and its net-zero commitment for 2050, detailing the expected GHG emissions reduction. It is necessary for the other five supermarkets to develop and publish detailed roadmaps to achieve near-term targets and ensure that these are in line with the Paris Agreement.



Aldi Süd, Kaufland, Lidl Germany, and Rewe have near-term targets to reduce indirect Scope 3 emissions. The targets of these four

German supermarkets cover emissions across all scopes. **Edeka** has set emission-reduction targets for 2032, but they do not cover all indirect Scope 3 emissions. All German supermarkets with near-term targets to reduce FLAG emissions, except Aldi Nord, are aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C. It is urgent for Aldi Nord to set a target to reduce Scope 3 emissions in the near term in line with the Paris Agreement.



Aldi Süd, Edeka, Kaufland, Lidl Germany, and Rewe are committed to becoming net-zero companies by 2050. Aldi Nord needs to

commit to becoming a net-zero company to align its climate plan with the German government's net-zero goal, set for 2045, ensuring a coordinated transition.

Progress



Kaufland and Rewe have reduced their total emissions since they began reporting.

Aldi Süd, Edeka and Lidl Germany have managed to reduce emissions from Scope 1 and 2, however these reductions have not been sufficient to compensate for the increase in indirect Scope 3 emissions relative to their respective baselines. Moreover, there is no

clear trend in Lidl Germany's emissions due to fluctuations in Scope 3 emissions over the past few years. As yet it is hard to determine the extent to which the achieved reductions by individual supermarkets contribute to meeting the goals of the Paris Agreement. However, the overall picture based on the total emissions published over the past few years indicates that the German supermarket sector is not on track. The progress of Aldi Nord in reducing emissions is unknown, as the supermarket has not reported its indirect Scope 3 emissions since 2020. With near-term target deadlines approaching, reporting progress towards targets and achieving actual emission reductions are crucial to contributing to the Paris Agreement's ambition to limit global warming to 1.5°C.

All supermarkets, except Aldi Nord, are transparent about their current carbon footprint. They also distinguish their agriculture-related emissions from other emissions, as well as their non-FLAG emissions, at the category level. Moreover, **Edeka**⁶ and **Lidl Germany** report their FLAG emissions by food category. Reporting emissions by food category is important because it helps identify the categories with the largest carbon footprint. For supermarkets, animal-based products have the largest carbon footprint of all food categories. Additionally, **Aldi Süd** published a graph showing its total emissions broken down by emissions source, including emissions by food group. However, the values are not quantified.

Rewe addresses its indirect Scope 3 emissions by financially supporting suppliers. This is an important development, as Scope 3 indirect emissions account for over 90 per cent of the environmental footprint of food supermarkets. The supermarket's parent company has set up a Climate Protection Fund programme to support its private-label suppliers in implementing sustainable practices. To receive funding, suppliers submit their climate plans, including a short-term



⁶ Edeka disclosed its FLAG emissions by food category after the data collection period for this benchmark.



emission-reduction target, with expected reductions that are quantified and permanent. Additionally, **Lidl Germany** supports its dairy suppliers by paying a premium to dairy farmers who adopt sustainability practices.

PROTEIN TRANSITION

All supermarkets, except Aldi Nord, acknowledge the importance of plant-rich diets in reducing their emissions.

They acknowledge their responsibility to increase the share of plant-based proteins in their sales. Moreover, the German government integrates plant-rich diets into its national dietary strategy (12). Therefore, it is essential for Aldi Nord to explicitly recognise its responsibility in supporting the shift to more plant-rich diets through its sales. Rebalancing protein sales is a crucial strategy that Aldi Nord should adopt to reduce the consumption of animal products and help keep the food system within planetary boundaries.



Aldi Süd, Lidl Germany and Rewe disclose their protein split within their total sales

Aldi Süd reports 56.4 per cent plant-based food in its total sales volume using the WWF method, while Lidl Germany reports 55.3 per cent and Rewe 54 per cent in 2024. They also disclose the share of plant-based foods in each food group, including the protein-rich and dairy categories. In the protein-rich segment, Aldi Süd has 13 per cent plant-based, compared with 11 per cent for Lidl Germany. For dairy alternatives, Aldi Süd reports 5 per cent plant-based and Lidl Germany 6 per cent. Aldi Süd set its protein split baseline in 2024, while Lidl Germany has been transparent about its protein split since 2022.

Kaufland has started reporting its protein split.

Kaufland published its protein split in 2023 based on the protein-rich and dairy categories of the WWF method, reporting 8 per cent plant-based in the protein-rich group and 10 per cent in the dairy alternative category. However, these figures have not yet been updated for 2024. It is important to report these figures annually to track progress in the protein transition and to lower the carbon footprint of food value chains.



Rewe and Lidl Germany have set targets to grow the share of plant-based proteins.

Rewe aims to reach 60 per cent of plant-based products in its total sales by 2035. Lidl Germany aims to increase the share of plant-based proteins in total sales by 20 per cent by 2030⁷, with category-specific targets to reach 20 per cent plant-based products sold in the protein-rich category and 10 per cent in the dairy alternatives category. The category-specific targets are not in line with the Planetary Health Diet. The supermarket has not published the protein split baseline for the target covering all food groups; therefore, it is not possible to confirm whether it is in line with the Planetary Health Diet. Nevertheless, based on its 2024 protein split, Lidl Germany is expected to achieve a protein split within the planetary boundaries set out in the Planetary Health Diet by 2050⁸.



⁷ This is a goal set by Lidl International, which Lidl Germany has also published on its national website.

⁸ This estimate is based on the expected protein split in 2050, obtained by forecasting the current protein split using the linear growth coefficient between the 2024 split across all food groups and the 2030 expected split based on the 2030 target.

How do German supermarkets perform compared to other European supermarkets?

German supermarkets, except Aldi Nord, are among the 19 European supermarkets that have set near-term targets in their climate plans. Lidl Germany is one of only seven supermarkets in Europe with a detailed roadmap to reach its near-term target. Compared with many of their European counterparts, German supermarkets (excluding Aldi Nord) provide greater transparency on their total GHG emissions, including a breakdown by scope. Additionally, Kaufland and Rewe are among the few European supermarkets that have demonstrated a reduction in total emissions since they began reporting.

Regarding the protein shift, German supermarkets are also among the frontrunners, as most disclose a protein split covering all food groups and/or within the protein-rich food categories. Lidl Germany and Rewe are among only eight supermarkets to have publicly set targets for their protein split across all food groups. By contrast, a large number of European supermarkets have not yet acknowledged the importance of a protein transition in reducing their emissions.

Supermarket-specific recommendations

Aldi Nord

In European ranking: 25/27



- Set a near-term target for 2035 at the latest to reduce Scope 3 emissions in line with the Paris Agreement. Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 target into quantified emission-reduction measures.
- Report emissions annually, by scope and by source (ie FLAG and non-FLAG). This is a necessary step in setting a concrete climate plan. This is necessary to establish a concrete climate plan and to track progress towards the near-term target.
- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Germany.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

- Set a target to increase the share of plant-based proteins in foods and decrease the share of animal-based foods within protein-rich food groups. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Edeka

In European ranking: 16/27



- Set near-term targets covering all non-FLAG emissions in Scope 3 in line with the Paris Agreement.
- Develop and publish a roadmap in line with the Paris Agreement, translating the 2030 Scope 3 targets into quantified emission-reduction measures.
- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Germany.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Aldi Süd

In European ranking: 8/27



- Develop and publish a roadmap in line with the Paris Agreement, translating the 2030 Scope 3 targets into quantified emission-reduction measures.
- Include financial support for suppliers in the climate plan to reduce indirect Scope 3 emissions.

Kaufland

In European ranking: 15/27



- Develop and publish a roadmap in line with the Paris Agreement, translating the 2030 Scope 3 targets into quantified emission-reduction measures.
- Include financial support for suppliers in the climate plan to reduce indirect Scope 3 emissions.
- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions:
 - Disclose the protein split annually based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Germany.
 - Set a target to increase the share of plant-based proteins in foods and decrease the share of animal-based foods within protein-rich food groups. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Rewe

In European ranking: 7/27



- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 target into quantified emission-reduction measures.
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein transition, as livestock production accounts for the majority of these emissions.
- Disclose the protein split annually, including protein-rich food groups. Set a target to increase the share of plant-based proteins in protein-rich food groups. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Lidl Germany

In European ranking: 5/27



- Give priority to emission reduction measures of the roadmap with the highest expected effect on the short term to achieve a reduction in total emissions. These include rebalancing proteins, as well as transport in supply chains and the use of sold products.
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein transition, as livestock production accounts for the majority of these emissions.
- Report the 2023 protein split baseline to confirm that the 20 per cent increase in the share of plant-based proteins is in line with the Planetary Health Diet.



THE NETHERLANDS

Dutch supermarkets are leading in transparency and target-setting in Europe

KEY FINDINGS

→ Climate roadmap

Lidl Netherlands and Albert Heijn have published detailed climate roadmaps to achieve their near-term emission-reduction targets.

→ Progress

Only Jumbo shows a reduction in its total GHG emissions over the past few years. Lidl Netherlands' total emissions have increased and Albert Heijn shows no visible trend. Yet, meeting the Paris Agreement is not in sight.

→ Protein transition

All Dutch supermarkets include the protein transition in their climate plans, and their protein split targets are in line with the Planetary Health Diet.

Superlist Europe Environment 2026 – The Netherlands

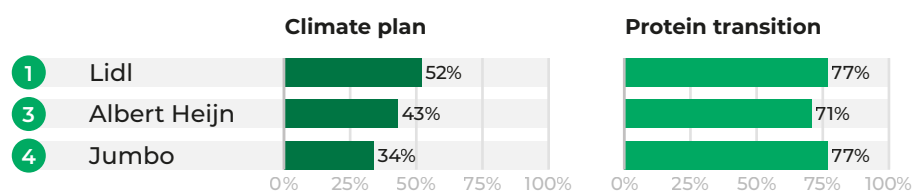


Figure 4 Ranking of three supermarkets in the Netherlands, according to their policies on greenhouse gas emissions and plant-rich diets.

THE DUTCH MARKET

Market size

Sixth largest among the eight markets assessed in this report (9, 13).

Supermarkets reported

Lidl
Albert Heijn
Jumbo

Total market share

70%

CLIMATE PLAN

Roadmaps



Albert Heijn and Lidl Netherlands have published climate roadmaps to achieve their near-term emission-reduction targets. Lidl

Netherlands has developed roadmaps in which both its near-term and long-term reduction targets are translated into a set of measures to reduce Scope 3 emissions. For each measure, Lidl Netherlands has determined the expected emission reduction. Albert Heijn⁹ has also developed a roadmap to reach its 2030 reduction target. Jumbo has not yet published a complete roadmap. However, to reach its 2030 reduction target, **Jumbo** aims to achieve a five per cent reduction in Scope 3 emissions through a dedicated protein transition. Additionally, Jumbo is implementing two pilot roadmaps in its milk and eggs value chains, quantifying the expected emission reduction for each measure to reach the respective 2030 targets for these two products.



All three supermarkets have near-term reduction targets for emissions across all scopes. Their near-term targets to reduce FLAG emissions are aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C. Moreover, **Albert Heijn, Jumbo** and **Lidl Netherlands** are committed to achieving net-zero emissions across all scopes by 2050. With these commitments, Dutch supermarkets have taken significant steps towards contributing to the Paris Agreement.



Progress



Jumbo is the first Dutch supermarket to show a reduction in its total carbon footprint since it started reporting in 2022. Lidl Netherlands has reduced its Scope 1 and 2 emissions but not sufficiently to compensate for the increase in Scope 3 emissions. Albert Heijn has also reduced its emissions in Scope 1 and 2, but no clear trend has yet emerged in its total emissions due to fluctuations in Scope 3 emissions over the past few years.

As yet it is hard to determine the extent to which the achieved reductions by individual supermarkets contribute to meeting the goals of the Paris Agreement. However, the overall picture based on the total emissions published over the past few years indicates that the Dutch supermarket sector is not on track.

All three supermarkets report their emissions across all scopes annually. They disclose their FLAG and non-FLAG emissions in Scope 3. **Albert Heijn** and **Lidl Netherlands** provide full transparency in their carbon footprint, reporting their FLAG emissions by food group and their non-FLAG emissions by emission source. Food groups containing animal protein contribute the largest share of FLAG emissions generated in the supermarkets' supply chains.



Albert Heijn is the world's first supermarket to report methane emissions separately and has set a specific target for their reduction.

Methane is a key contributor to agriculture-related emissions that supermarkets emit indirectly through their food chains, mainly through livestock. Methane is the second most significant greenhouse gas due to its contribution to global warming (4,5). Measuring methane emissions is therefore essential for supermarkets to identify sources within their value chains and to determine levers for reducing them.



Albert Heijn, Jumbo and Lidl Netherlands provide financial support to their suppliers to reduce their environmental impact. Albert

Heijn provides financial support to fruit and vegetable suppliers to implement sustainable practices and pays them bonuses upon achieving sustainability goals. Jumbo has established an impact fund to support private-label suppliers in implementing practices that result in emission reductions. Lidl Netherlands offers a premium for labelled products, runs pilots for regenerative agriculture and participates in consultancy programmes to assist suppliers.



⁹ This roadmap was developed by Ahold Delhaize, the parent company of Albert Heijn.

PROTEIN TRANSITION



Albert Heijn, Jumbo and Lidl Netherlands

have a common protein split target. All Dutch supermarkets commit to a 60:40 split of plant-based to animal proteins in their sales by 2030, in line with the Planetary Health Diet¹⁰. The three supermarkets have taken an additional step by setting a near-term target of 50 per cent plant-based proteins in their sales by 2025. As described in the climate plan section, the protein transition is integrated into their roadmaps to reach the 2030 emission-reduction targets. The three supermarkets report their protein split over total sales using The Protein Tracker method from 2022¹¹. This ensures compatibility across supermarkets at national level. Since 2022, these supermarkets

have experimented with various measures, such as price parity and store layout, to stimulate purchases of plant-based products.

Lidl Netherlands reports the protein split across separate food groups. In addition to reporting and setting targets in its total sales volume using The Protein Tracker method, Lidl Netherlands reports the share of plant-based foods in each food group defined by the WWF method, including protein-rich foods, dairy and dairy alternatives. Since **Lidl Netherlands** reports using both methods, their figures can be compared with all supermarkets using either method.



How do Dutch supermarkets perform compared to other European supermarkets?

Albert Heijn and Lidl Netherlands are among the seven European leaders with a disclosed roadmap to reach their near-term targets. Jumbo also has a near-term target in place. Compared with many of their European counterparts, Dutch supermarkets are among the most transparent, reporting total GHG emissions detailed by scope and emission source. In addition to reporting by supermarkets themselves, the Dutch government publicly monitors the emissions and reduction targets of all Dutch supermarkets. With their 'Dashboard Sustainable Supermarkets' the Dutch government underlines the crucial role that supermarkets play in a sustainable food system.

Furthermore, Albert Heijn stands out for reporting methane emissions separately, reflecting a high level of transparency that strengthens its climate plans and the development of concrete roadmaps. Jumbo

is also notable as one of five European supermarkets that have demonstrated a decrease in total emissions since reporting began.

Regarding the protein shift, Dutch supermarkets are frontrunners: all disclose their protein split and have set targets to increase the share of plant-based proteins in their total sales, in line with the Planetary Health Diet. This development is supported by the Dutch government, which has put rebalancing protein consumption on the national agenda. It aims to reach 50 per cent plant-based protein consumption by 2050. The combination of clear government targets, civil society organisations and actively involved supermarkets setting up The Protein Tracker has accelerated transparency, target-setting and concrete measures to stimulate plant-based protein sales.

¹⁰ This estimate is based on the expected protein split in 2050, obtained by forecasting the current protein split of a supermarket using the linear growth coefficient between the supermarket's reported split and the 2030 expected split, based on the 60:40 goal.

¹¹ Albert Heijn's 2024 protein split covers 78% of its total sales volume. Lidl Netherlands' 2024 protein split covers over 90% of its total sales volume.

Supermarket-specific recommendations

Albert Heijn

In European ranking: 3/27



- Give priority to emission reduction measures of the roadmap with the highest expected effect on the short term to achieve a reduction in total emissions. These include rebalancing proteins, as well as the end-of-life treatment of sold products (e.g via reducing product packaging).
- Further develop the roadmap by translating the 2050 net-zero commitment into a set of measures with quantified emission reductions. It is important to ensure this roadmap is in line with the Paris Agreement.
- Provide financial support to all suppliers to help reduce indirect Scope 3 emissions across all value chains.

Lidl Netherlands

In European ranking: 1/27



- Give priority to emission reduction measures of the roadmap with the highest expected effect on the short term to achieve a reduction in total emissions. These include rebalancing proteins, as well as the end-of-life treatment of sold products (e.g via reducing product packaging).
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein transition, as livestock production accounts for the majority of these emissions.
- Provide financial support to all suppliers to help reduce indirect Scope 3 emissions across all value chains.

Jumbo

In European ranking: 4/27



- Further develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 target into quantified emission-reduction measures.
- Report FLAG and non-FLAG emissions by category annually to identify the largest sources of emissions in Scope 3 and align the roadmap accordingly. This is also crucial for tracking progress towards the near-term target.
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein transition, as livestock production accounts for the majority of these emissions.



POLAND

Lidl Poland leads Biedronka and Dino on climate and protein strategies

KEY FINDINGS

→ Climate roadmap

Biedronka and Lidl Poland have set near-term reduction targets. Lidl Poland has published a detailed roadmap to reach its target.

→ Progress

None of the supermarkets has shown a reduction in its total carbon footprint since reporting began.

→ Protein transition

Lidl Poland is the only Polish supermarket in this report with the protein transition on its agenda, reporting its protein split and setting a 2030 target that is in line with the Planetary Health Diet.

Superlist Europe Environment 2026 – Poland

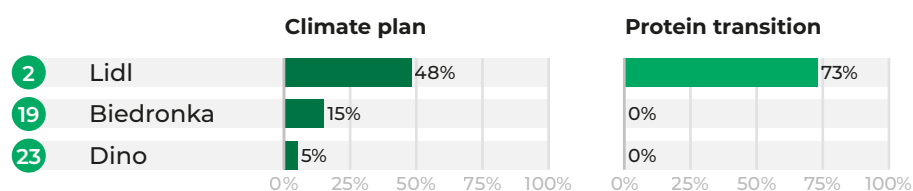


Figure 5 Ranking of three supermarkets in Poland, according to their policies on greenhouse gas emissions and plant-rich diets.

THE POLISH MARKET

Market size

Seventh largest among the eight markets assessed in this report (9, 11).

Supermarkets reported

Biedronka
Dino
Lidl

Total market share

74%

CLIMATE PLAN

Roadmaps



Lidl Poland has published a detailed roadmap to reach its near-term emission-reduction target. The supermarket has developed short- and long-term roadmaps in which its targets are translated into a set of measures to reach its 2034 and 2050 reduction targets. For each measure, the supermarket has estimated the expected emission reduction. In addition to its near-term roadmap, Lidl Poland has a roadmap to become net zero by 2050. Despite Dino's ambition to reduce its carbon footprint, it has not set any emission-reduction targets.



Biedronka also has a near-term emission-reduction target. Both **Biedronka** and **Lidl Poland** have reduction targets across all scopes, as well as specific targets for FLAG and non-FLAG emissions within Scope 3. Their near-term targets covering FLAG emissions are aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C (see 'Target validation by the Science Based Targets initiative (SBTi)' in the [Glossary](#)).



Lidl Poland is the only Polish supermarket explicitly committed to being a net-zero company by 2050. While Biedronka has reduction targets for FLAG and non-FLAG emissions by 2050, the supermarket does not have an explicit commitment to becoming a net-zero company by that year. It is essential for Biedronka and Dino to make this commitment in order to align their climate plans with the goals of the EU and the Polish government, ensuring a coordinated transition.

Progress

None of the three supermarkets has shown a reduction in its total GHG emissions since reporting began. Although all three acknowledge their responsibility in contributing to the Paris Agreement's ambition to limit global warming to 1.5 °C, total emissions have increased for each supermarket since reporting began. Total emissions of Lidl Poland have increased since its baseline. Despite a slight decline between 2023 and 2024, Biedronka's Scope 3 emissions have increased overall since its baseline. Dino reported its Scope 3 emissions for the first time in 2024, making it unclear whether its total emissions have increased or decreased. Moreover, reporting progress towards targets and achieving actual emission reductions is fundamental to contributing to the Paris Agreement's ambition to limit global warming to 1.5 °C. Furthermore, none of the Polish supermarkets currently provides financial support to suppliers to implement sustainable farming practices to reduce their emissions. Direct investment in supply chains and financial support for implementing sustainable practices are necessary to reduce total emissions.

Lidl Poland is the most transparent regarding its current carbon footprint. The supermarket discloses its FLAG and non-FLAG emissions, as well as its FLAG emissions by food group and its non-FLAG emissions by emission source. The data confirm that the largest share of emissions is generated by sold products, particularly animal proteins. It is therefore essential for Biedronka and Dino to start reporting a breakdown of emissions by scope as well as FLAG and non-FLAG emissions by category, to increase transparency about emission sources and identify levers for reduction.



PROTEIN TRANSITION



Lidl Poland is the only Polish supermarket in this report with the protein transition on its agenda.

The supermarket reports its protein split according to the WWF method, showing 56 per cent plant-based food in its total sales volume¹². Lidl Poland has set targets to increase the share of plant-based proteins in its total sales by 20 per cent by 2030¹³, in line with the Planetary Health Diet¹⁴. Additionally, Lidl Poland has set 2030 growth targets in two specific food groups: 15 per cent in protein-rich foods and 8 per cent in dairy and dairy alternatives, which are not in line with the Planetary Health Diet.

Biedronka and Dino have not incorporated a protein transition into their strategies.

Dino does not mention plant-based products in its strategy, while Biedronka explicitly focuses on developing its plant-based product range to meet consumer demand. However, Biedronka does not yet demonstrate the ambition to increase sales of plant-based proteins and reduce those of animal proteins. Rebalancing protein sales is a crucial strategy that Biedronka and Dino should adopt to reduce the consumption of animal products to help keep the food system within planetary boundaries.

How do Polish supermarkets perform compared to other European supermarkets?

Lidl Poland is among the seven European leaders with a roadmap to reach its near-term target. Biedronka belongs to the majority of European supermarkets that have set a near-term target but have not yet published a detailed roadmap to achieve it. By contrast, Dino is one of the eight lagging supermarkets without a near-term target. Similar to most supermarkets in Europe, none of the Polish supermarkets has demonstrated a reduction in its total emissions since reporting began.

Lidl Poland is also among the 11 leaders in Europe that disclose their protein split and have set a target to increase the share of plant-based proteins in their total sales. It is one of only four supermarkets whose target

is confirmed to be in line with the planetary boundaries set by the Planetary Health Diet. In contrast, Biedronka and Dino are among the nine supermarkets that do not acknowledge their role in the protein transition and have yet to include rebalancing protein sales in their climate plans to reduce indirect Scope 3 emissions.

¹² Lidl Poland's 2024 protein split covers 88% of its total sales volume.

¹³ This is a goal set by Lidl International, which Lidl Poland has also published on its national website.

¹⁴ This estimate is based on the expected protein split in 2050, obtained by forecasting the current protein split using the linear growth coefficient between the 2023 reported baseline across all food groups and the 2030 expected split, based on the 2030 target.

Supermarket-specific recommendations

Biedronka

In European ranking: 19/27



- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report emissions annually, by scope and by source (ie FLAG and non-FLAG). This is a necessary step in establishing a concrete climate plan and tracking progress towards the near-term target.
- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Poland.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

climate plan and tracking progress towards the near-term target.

- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Poland.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Lidl Poland

In European ranking: 2/27



- Give priority to emission reduction measures of the roadmap with the highest expected effect on the short term to achieve a reduction in total emissions. These include rebalancing proteins, as well as the end-of-life treatment of sold products (e.g via reducing product packaging).
- Provide financial support to all suppliers to help reduce indirect Scope 3 emissions across all value chains. A just transition towards a sustainable food system requires sharing the financial burden of the transition across the value chain.
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein transition, as livestock production accounts for the majority of these emissions.

Dino

In European ranking: 23/27



- Set a near-term target for 2035 at the latest to reduce Scope 3 emissions in line with the Paris Agreement. Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report emissions annually, by scope and by source (ie FLAG and non-FLAG). This is a necessary step in establishing a concrete



SPAIN

Mercadona lags behind its international competitors, Lidl and Carrefour, in Spain

KEY FINDINGS

→ Climate roadmap

Carrefour Spain¹⁵ and Lidl Spain have published detailed climate roadmaps outlining how to reach their near-term emission-reduction targets.

→ Progress

None of the supermarkets show a reduction in their total carbon footprint since they started reporting.

→ Protein transition

Carrefour Spain and Lidl Spain include rebalancing proteins in their climate roadmaps. Lidl Spain reports its protein split and has set targets.

Superlist Europe Environment 2026 – Spain

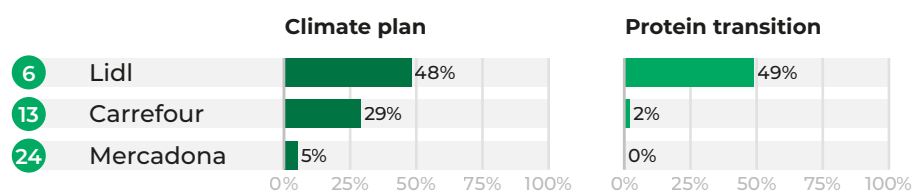


Figure 6 Ranking of three supermarkets in Spain according to their policies on greenhouse gas emissions and plant-rich diets.

THE SPANISH MARKET

Market size

Fourth largest among the eight markets assessed in this report (9, 10).

Supermarkets reported

Carrefour Spain
Lidl
Mercadona

Total market share

42%

¹⁵ Due to the lack of public information and policy published by Carrefour Spain, the analysis is based on publications by its parent company, Carrefour France.

CLIMATE PLAN

Roadmaps



Carrefour Spain and Lidl Spain have published detailed roadmaps to reach their reduction targets. Lidl Spain has developed roadmaps in which its near-term and long-term reduction targets are translated into a set of measures to reduce Scope 3 emissions. For each measure, Lidl Spain has quantified the expected emission reduction. Similarly, Carrefour Spain has developed a roadmap to achieve its 2030 reduction target.



Carrefour Spain and Lidl Spain have set near-term reduction targets across all scopes. They have also set specific targets for FLAG and non-FLAG emissions within Scope 3. **Lidl Spain's** FLAG target is aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C. In contrast, it is crucial for Mercadona to translate its net-zero commitment into near-term targets to ensure immediate action to reduce emissions.



Lidl Spain and Mercadona are explicitly committed to becoming net-zero companies by 2050. The supermarkets align their strategies with the EU's commitment to reach net zero by 2050. Carrefour Spain has made a net-zero commitment for 2040, but this target applies only to its Scope 1 and 2 emissions, which represent approximately 10 per cent of its total emissions. It is essential for all supermarkets to commit to becoming net-zero companies by 2050, aligning their climate plans with the goals of the EU and the Spanish government to ensure a coordinated transition.

Progress

None of the three supermarkets has demonstrated a reduction in its total GHG emissions since reporting began. Despite acknowledging their responsibility to reduce their carbon footprints in line with the Paris Agreement, all three have seen an increase in

emissions since reporting began. Lidl Spain has reduced its Scope 1 and 2 emissions but not sufficiently to compensate for the increase in indirect Scope 3 emissions. Despite a slight decline between 2023 and 2024, Carrefour Spain's Scope 3 emissions have increased since its baseline. No clear trend has yet emerged in Mercadona's emissions due to fluctuations in emission levels over the past few years. With near-term target deadlines approaching, reporting progress towards targets and achieving actual emission reductions are crucial to contributing to the Paris Agreement's ambition to limit global warming to 1.5 °C. Moreover, none of the Spanish supermarkets provides financial support to suppliers to implement sustainable farming practices to reduce emissions. Direct investment in supply chains and financial support for implementing sustainable practices are necessary to reduce total emissions.

Lidl Spain demonstrates the highest level of transparency regarding its carbon footprint.

The supermarket discloses its FLAG and non-FLAG emissions, as well as its FLAG emissions by food group and its non-FLAG emissions by emission source. The greater environmental footprint of producing animal products is evident in Lidl Spain's reported emissions. Carrefour Spain reports its emissions per scope, while Mercadona does not differentiate emissions by scopes. It is essential for Mercadona to begin reporting its emissions by scope on an annual basis. Supermarkets should also start reporting a breakdown of emissions by scope as well as FLAG and non-FLAG emissions by category, to ensure transparency about emission sources and identify key levers for reduction.



PROTEIN TRANSITION



Carrefour Spain and Lidl Spain include the protein transition in their climate roadmaps.

As outlined in the climate plan section, Carrefour Spain and Lidl Spain include the protein transition as a measure in their climate roadmaps to achieve their 2030 emission-reduction targets. Carrefour Spain estimates that substituting 30 per cent of animal proteins with plant-based ones in its roadmap will achieve a 3 per cent emission reduction. The supermarket plans to achieve this through measures such as product innovation, expanding its plant-based product range, and engaging stakeholders by signing a food transition pact. Carrefour Spain has also set targets to reach €650 million in turnover from plant-based protein substitutes by 2026. However, the supermarket has not explicitly set a target to reduce sales of animal proteins in order to rebalance protein consumption as determined by the Planetary Health Diet. In contrast, Mercadona does not explicitly address the protein transition as part of its climate plan, although the supermarket offers plant-based products to meet consumer demand. Lidl Spain is the only Spanish supermarket to

disclose its protein split. It reports the highest percentage of plant-based proteins in the protein-rich category compared with all supermarkets within the scope of this research that used the WWF method. The supermarket also reports that 49 per cent of its total sales consists of plant-based foods and provides the split for each food group according to the WWF method.



Lidl Spain has set targets to increase the share of plant-based proteins in two categories.

The supermarket has set targets to increase the share of plant-based proteins in its total sales by 20 per cent by 2030¹⁶, as well as two category-specific targets: 20 per cent in the protein-rich food group and 15 per cent in the dairy and dairy alternative food group. The category-specific targets are not in line with the Planetary Health Diet. However, Lidl Spain has not published the protein split baseline for the target covering all food groups, so it is not possible to confirm whether it is in line with the Planetary Health Diet. Nevertheless, based on its 2024 protein split, Lidl Spain is expected to achieve a protein split within the planetary boundaries set by the Planetary Health Diet by 2050¹⁷.



How do Spanish supermarkets perform compared to other European supermarkets?

Carrefour Spain and Lidl Spain are among the seven European frontrunners with detailed roadmaps to reach their near-term targets. They are also among the 19 European supermarkets that have set concrete near-term targets in their climate plans. By contrast, Mercadona is one of the eight lagging supermarkets without a near-term target. Moreover, like most supermarkets in Europe, Spanish supermarkets have not demonstrated a reduction in total emissions since reporting began. In terms of emissions reporting, Carrefour Spain and Lidl Spain are more transparent than many of their European counterparts, providing a breakdown of total GHG emissions by scope. Lidl Spain is among the few

supermarkets to report FLAG and non-FLAG emissions by source.

Regarding the protein shift, Lidl Spain is one of 11 leaders in Europe disclosing its protein split and has set a target to increase the share of plant-based proteins in total sales. Carrefour Spain includes the protein transition in its climate roadmap and aims to substitute part of its animal proteins with plant-based alternatives, but the supermarket does not yet disclose its current protein split. By contrast, Mercadona is among the nine supermarkets that do not acknowledge their role in the protein transition and do not include rebalancing proteins in their climate plan to reduce indirect Scope 3 emissions.

¹⁶ This is a goal set by Lidl International, which Lidl Spain has also published on its national website.

¹⁷ This estimate is based on the expected protein split in 2050, obtained by forecasting the current protein split using the linear growth coefficient between the 2024 split across all food groups and the 2030 expected split, based on the 2030 target.

Supermarket-specific recommendations

Carrefour Spain

In European ranking: 13/27



- Report FLAG and non-FLAG emissions annually to identify the largest sources of emissions and align the roadmap accordingly. Tracking and reporting progress towards meeting the near-term target is crucial.
- Provide financial support to all suppliers to reduce indirect Scope 3 emissions across all value chains.
- Further integrate the protein transition into the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Spain.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. Targets should align with the Planetary Health Diet and be set for the near term to support immediate implementation.

sustainable food system requires sharing the financial burden of the transition across the value chain.

- Report the 2022 protein split baseline to confirm that the 20 per cent increase in the share of plant-based proteins is in line with the Planetary Health Diet.

Mercadona

In European ranking: 24/27



- Translate the net-zero commitment into a near-term reduction target for at least Scope 3 emissions for 2035 at the latest, in line with the Paris Agreement. Develop and publish a roadmap aligned with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report emissions annually, by scope and by source (ie FLAG and non-FLAG). This is a necessary step in setting a concrete climate plan. This is essential for creating a concrete climate plan and tracking progress towards near-term targets.
- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Spain.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Lidl Spain

In European ranking: 6/27



- Give priority to emission reduction measures of the roadmap with the highest expected effect on the short term to achieve a reduction in total emissions. These include rebalancing proteins, as well as the end-of-life treatment of sold products (e.g via reducing product packaging).
- Provide financial support to all suppliers to reduce indirect Scope 3 emissions in all value chains. A just transition towards a



SWEDEN

Swedish supermarkets lag behind their European counterparts in climate and protein plans

KEY FINDINGS

→ Climate roadmap

Coop Sweden, ICA and Willys/Hemköp¹⁸ have GHG emission-reduction targets, including targets to reduce emissions from their product ranges. However, none of the Swedish supermarkets has published a climate roadmap.

→ Progress

ICA has demonstrated a reduction in its total GHG emissions compared to its baseline.

→ Protein transition

ICA is the only supermarket to explicitly acknowledge its role in supporting the transition towards more plant-rich diets as a means of reducing GHG emissions.

Superlist Europe Environment 2026 – Sweden

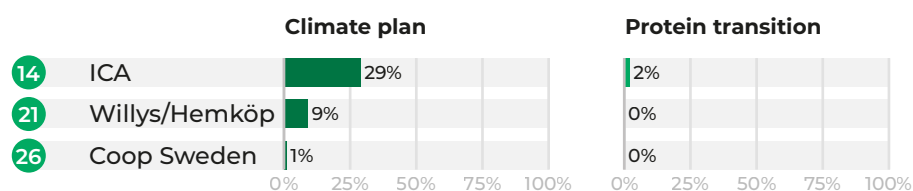


Figure 7 Ranking of three supermarkets in Sweden, according to their policies on greenhouse gas emissions and plant-rich diets.

THE SWEDISH MARKET

Market size

Eight-largest among the eight markets assessed in this report (9, 11).

Supermarkets reported

Coop Sweden
ICA
Willys/Hemköp

Total market share

85%

¹⁸ Due to the lack of public information and policy published by Willys and Hemköp, the analysis is based on publications by their parent company, Axfood.

CLIMATE PLAN

Roadmaps

None of the three Swedish supermarkets has published a detailed roadmap describing how it will reach its near-term target.

Coop Sweden and ICA have set reduction targets across all scopes for 2030 or earlier. **ICA** has two separate targets to reduce FLAG and non-FLAG emissions within Scope 3 and is the only Swedish supermarket explicitly committed to net zero by 2050. Its reduction targets for FLAG emissions are aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C. Although Willys/Hemköp has set a reduction target for its Scope 1 and 2 emissions, prioritising target-setting for Scope 3 emissions is crucial, as these indirect emissions account for about 90 per cent of a supermarket's carbon footprint. It is also important for Willys/Hemköp to establish interim targets between now and 2035 to ensure immediate action on emission reductions.



Willys/Hemköp, ICA and Coop Sweden all have near-term targets to reduce emissions linked to sold food products.

Swedish supermarkets differentiate themselves from other European supermarkets by setting separate targets to reduce the carbon footprint of sold food products by 2030. None of the 24 other European supermarkets has a specific target for this category of Scope 3 emissions. Given that most agriculture-related emissions are generated by animal-based products, these efforts are expected to contribute to rebalancing protein sales.



Progress

ICA is the only Swedish supermarket to show a reduction in its total carbon footprint since it started reporting. Most reductions have been achieved in the following Scope 3 categories: the use of sold products, franchises, commuting, and transport. There is no clear overall trend yet, as Scope 3 emissions

increased slightly between 2023 and 2024. Nevertheless, 2024 emissions remain below the baseline, contributing to ICA's near-term target. Regarding the progress of Coop Sweden and Willys/Hemköp, no conclusions can be drawn due to inconsistencies in reporting. Coop Sweden reports emissions using categories other than those in the GHG Protocol, making it impossible to distinguish emissions by scope. The supermarket also reports emissions per regional branch but does not disclose the total emissions for the cooperative. There is no clear trend yet in Willys/Hemköp total emissions due to inconsistencies in reporting: emissions reported in 2024 cover all Scope 3 categories, whereas data from previous years are incomplete. With near-term target deadlines approaching, reporting progress towards targets and achieving actual emission reductions are crucial to contributing to the Paris Agreement's ambition to limit global warming to 1.5 °C. Moreover, none of the Swedish supermarkets publicly report that they provide financial support to suppliers to implement sustainable farming practices to reduce emissions. In fact, direct investment in supply chains and financial support for implementing sustainable practices are necessary to reduce total emissions.

ICA and Willys/Hemköp report their current GHG emissions per scope. ICA is the most transparent, reporting its FLAG and non-FLAG emissions in Scope 3 separately, as well as FLAG emissions at the food-category level. Coop Sweden is less transparent, reporting only some emission categories, whereas Willys/Hemköp and ICA report emissions across all scopes. It is necessary for Coop Sweden to report emissions comprehensively, per scope and on an annual basis. It is essential for Coop Sweden and Willys/Hemköp to start reporting a breakdown of emissions by scope as well as FLAG and non-FLAG emissions by category, to increase transparency about emission sources and identify levers for reduction.



PROTEIN TRANSITION



ICA is the only supermarket acknowledging its role in rebalancing protein sales towards plant-rich diets.

By mapping its FLAG emissions at the food-category level, ICA identified that about half of its products with the heaviest environmental footprint contain animal protein. The supermarket is actively testing measures and policies to stimulate sales of plant-based proteins and reduce sales of animal proteins, mainly through nudging and introducing hybrid products. However, ICA has not set a specific target to increase the share of plant-based proteins in its sales.



Coop Sweden and Willys/Hemköp express the need for a protein transition but do not acknowledge their responsibility in supporting it. Willys/Hemköp acknowledges the heavy environmental footprint of animal protein, and its protein strategy is to expand the range of plant-based and hybrid products. Similarly, Coop Sweden promotes transparency

through a sustainability score to encourage consumers to choose products with a low environmental impact, but it does not explicitly acknowledge its influential role in the transition. While these steps may stimulate the sales of plant-based products, an effective protein strategy should also include reducing the share of animal proteins sold. None of the Swedish supermarkets has set targets to increase the share of plant-based proteins in their sales. Moreover, the Swedish government integrates plant-based proteins into its national daily dietary recommendations (11). Therefore, it is essential for Swedish supermarkets to explicitly recognise their responsibility in supporting the shift to more plant-rich diets through their sales. Rebalancing protein sales is a crucial strategy that supermarkets should adopt to reduce the consumption of animal products and help keep the food system within planetary boundaries.

How do Swedish supermarkets perform compared to other European supermarkets?

ICA and Coop Sweden are among the 19 European supermarkets that have set concrete near-term targets in their climate plans. Moreover, ICA is one of five European supermarkets to have achieved a reduction in total emissions since it started reporting. The supermarket is among the most transparent in reporting emissions, as it also maps FLAG and non-FLAG emissions by source. Coop Sweden, by contrast, is one of three lagging supermarkets in Europe that disclose only part of their total emissions.

Regarding the protein shift, none of the Swedish supermarkets disclose their protein split or have set targets to increase the share

of plant-based proteins in their total sales. Nevertheless, Swedish supermarkets are testing measures to increase sales of plant-based proteins. They are also unique among European supermarkets in having specific targets to reduce emissions from sold food products. Given that most agriculture-related emissions are generated by products containing animal protein, these efforts should contribute to rebalancing protein consumption.

Supermarket-specific recommendations

Willys/Hemköp

In European ranking: 21/27



- Set a near-term target for 2035 at the latest to reduce Scope 3 emissions in line with the Paris Agreement. Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report FLAG and non-FLAG emissions per category annually in order to identify the largest sources of emissions and align the roadmap accordingly. This is a necessary step in setting a concrete climate plan and in tracking and reporting progress towards the near-term target.
- Translate the emission-reduction target for sold food products into a protein-split target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. In addition, disclose the protein split based on total sales and within protein-rich food groups. The protein split is also a way to track progress in reducing emissions from sold food products, since animal proteins generate the most emissions of all food products.

a concrete climate plan and in tracking and reporting progress towards the near-term target.

- Translate the emission-reduction target for sold food products into a protein-split target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. In addition, disclose the protein split based on total sales and within protein-rich food groups. The protein split is also a way to track progress in reducing emissions from sold food products, since animal proteins generate the most emissions of all food products.

ICA

In European ranking: 14/27



- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein transition, as livestock production accounts for the majority of these emissions.
- Translate the emission-reduction target for sold food products into a protein-split target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. In addition, disclose the protein split based on total sales and within protein-rich food groups. The protein split is also a way to track progress in reducing emissions from sold food products, since animal proteins generate the most emissions of all food products.

Coop Sweden

In European ranking: 26/27



- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report emissions annually, per scope and per source (ie FLAG and non-FLAG), covering all regional branches of Coop Sweden. This is a necessary step in setting



SWITZERLAND

Swiss supermarkets are lagging behind in climate plans, but are pursuing good approaches to reducing emissions

KEY FINDINGS

→ Climate roadmap

None of the Swiss supermarkets has published a roadmap to reach its near-term emission-reduction targets.

→ Progress

Migros's total emissions and Coop Switzerland's Scope 3 emissions have decreased, while Denner's¹⁹ total emissions have increased since their respective baselines.

→ Protein transition

Denner and Migros report their protein split in protein-rich food groups. Denner has set a target of 40 per cent plant-based proteins in its total sales by 2040.

Superlist Europe Environment 2026 – Switzerland

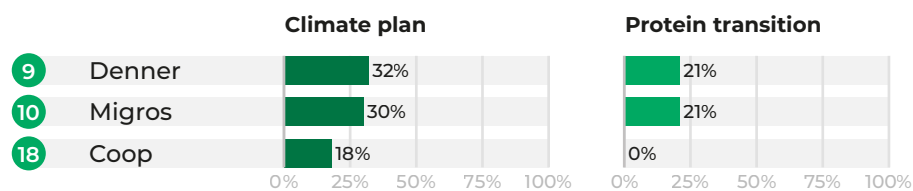


Figure 8 Ranking of 3 supermarkets in Switzerland, according to their policies on greenhouse gas emissions and plant-rich diets.

THE SWISS MARKET

Market size

Fifth largest among the eight markets assessed in this

report (15, 16).

Supermarkets reported

Coop Switzerland
Denner

PLAN

Roadmaps



None of the three Swiss supermarkets has published a roadmap to reach its near-term emission-reduction targets. Coop



Switzerland and **Denner** have set reduction targets across all scopes, as well as separate targets for FLAG and non-FLAG emissions within Scope 3. **Migros** has a 2030 reduction target for FLAG emissions, but its other targets do not fully cover the rest of Scope 3. Nevertheless, their near-term targets to reduce FLAG emissions are aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C. Moreover, all three Swiss supermarkets are committed to achieving net zero by 2050. Therefore, publishing a roadmap to reach the near-term targets is key to ensuring immediate reductions in emissions.



The three Swiss supermarkets intend to reduce emissions by supporting suppliers. In July 2025, **Coop Switzerland, Denner and Migros** signed a letter of intent to design a financing model for actors in the value chain, including a premium for producers. This is an important step towards reducing supermarkets' indirect Scope 3 emissions from food value chains and supporting their suppliers in implementing sustainable practices. The specifications of this new model will be published at the end of 2025. Migros has supported its suppliers since 2019 in switching to fossil-free greenhouses, aiming to achieve fully fossil-free heating by 2025.

Progress



Migros has reduced its total emissions compared to its baseline. This reduction was

mainly achieved by switching to more sustainable sources of energy to reduce emissions in Scope 1 and 2; fuel and energy-related activities, treatment and use of sold products in Scope 3. Reductions in indirect Scope 3 emissions have mainly occurred in product ranges and fuel- and energy-related activities.

Coop Switzerland's Scope 3 emissions have begun to decline since it started reporting. However, its reported baseline emissions do not include location-based Scope 2 emissions. As a result, it remains unclear whether this constitutes a net reduction in total emissions. By contrast, Denner's total carbon footprint has increased since its baseline. With near-term target deadlines approaching, reporting progress towards targets and achieving actual emission reductions are crucial for Denner to contribute to the Paris Agreement's ambition to limit global warming to 1.5 °C.



Coop Switzerland, Denner and Migros are transparent about their emissions across all scopes. Denner and Migros take

additional steps by distinguishing their FLAG and non-FLAG emissions, reporting their FLAG emissions at the food-category level, and disclosing their non-FLAG emissions by emission category. It is necessary for Coop Switzerland to increase transparency in its emission reporting by publishing a breakdown by scope as well as FLAG and non-FLAG emissions by category. This will improve transparency about emission sources and help identify levers for reduction.

PROTEIN TRANSITION



Denner and Migros report their protein split in protein-rich food groups. In 2024, Migros had slightly higher plant-based sales, with 15 per cent in the protein-rich category and 5 per cent in dairy alternatives, whereas Denner reported 10 per cent in the protein-rich category and 3 per cent in dairy alternatives using the WWF method.

Denner has published a protein split target.

The supermarket aims to reach 50 per cent of plant-based proteins in sales by 2040. However, it is not possible to confirm whether this target is in line with the Planetary Health Diet. Denner has not yet disclosed its protein split for the total sales volume. Migros has announced that it will publish a protein target by the end of 2025.

Coop Switzerland acknowledges that plant-based proteins are part of a more sustainable diet.

However, its protein strategy focuses on meeting consumer demand from those willing to switch to a more plant-rich diet, rather than implementing policies to stimulate sales of plant-based proteins. Moreover, the Swiss government has included plant-based proteins in its national daily dietary recommendations (17). Therefore, it is essential for Coop Switzerland to explicitly acknowledge its responsibility in supporting the shift to more plant-rich diets through its sales. Rebalancing protein sales is a crucial strategy that supermarkets should adopt to reduce the consumption of animal products and help keep the food system within planetary boundaries.



How do Swiss supermarkets perform compared to other European supermarkets?

Swiss supermarkets are among the 19 European supermarkets that have set concrete near-term targets in their climate plans. However, none of the Swiss supermarkets has published a detailed roadmap yet.

Swiss supermarkets have taken a first step towards working together to provide financial support to suppliers in implementing sustainable practices. They are frontrunners in Europe in collaborating on reducing indirect Scope 3 emissions. Moreover, Denner and Migros are among the most transparent supermarkets in Europe, splitting indirect Scope 3 emissions by food group within agriculture-related emissions and by source within energy and industry emissions.

Among the 27 supermarkets benchmarked, Migros is one of five European supermarkets to have achieved a reduction in total emissions since it started reporting. Coop Switzerland is one of the few supermarkets to demonstrate a reduction in indirect Scope 3 emissions. However, it remains unclear whether this constitutes a net reduction in total emissions.

When it comes to the protein shift, Migros and Denner are also among the frontrunners of the 27 European supermarkets, as they disclose their protein split. By contrast, Coop Switzerland is among the many European supermarkets that have recognised the need to rebalance proteins to reduce their emissions, but it has not yet reported its protein split or set a target to increase the share of plant-based proteins in its sales.

Supermarket-specific recommendations

Coop Switzerland



In European ranking: 18/27

- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report FLAG and non-FLAG emissions per category annually to identify the largest sources of emissions and align the roadmap accordingly. This is a necessary step in setting a concrete climate plan and in tracking and reporting progress towards the near-term target.
- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in Switzerland.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. Targets should align with the Planetary Health Diet and be set for the near term to support immediate implementation and action.

transition, as livestock production accounts for the majority of these emissions.

- Report the 2022 protein split baseline to confirm that the 20 per cent increase in the share of plant-based proteins is in line with the Planetary Health Diet.

Migros



In European ranking: 10/27

- Set a near-term reduction target covering all non-FLAG emissions within Scope 3. Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein transition, as livestock production accounts for the majority of these emissions.
- Set targets to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. Targets should align with the Planetary Health Diet and be set for the near term to support immediate implementation and action.

Denner



In European ranking: 9/27

- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Include reporting and target-setting specifically for methane emissions in the climate plan. Measuring and reducing methane emissions can support the protein



UNITED KINGDOM

Tesco and Sainsbury's lag behind the European trend, with Asda trailing further behind its peers

KEY FINDINGS

→ **Climate roadmap**

Sainsbury's and Tesco have set near-term reduction targets, while Asda is revising its climate plan and has not yet set a new target.

→ **Progress**

None of the supermarkets show clear progress in reducing total emissions; meeting the Paris Agreement is not yet in sight. Sainsbury's progress is unknown, as it has not reported Scope 3 emissions since its baseline.

→ **Protein transition**

Sainsbury's and Tesco report their protein split in protein-rich food groups, but neither has published specific protein-split targets.

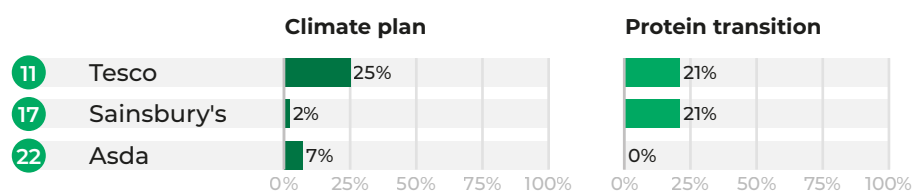
Superlist Europe **Environment** 2026 – United Kingdom

Figure 9 Ranking of three supermarkets in the United Kingdom, according to their policies on greenhouse gas emissions and plant-rich diets.

THE UK MARKET

Market size

Second largest among the eight markets assessed in this report (9, 11).

Supermarkets reported

Asda, Sainsbury's and Tesco

Total market share

60%

CLIMATE PLAN

Roadmaps

None of the three UK supermarkets has published a detailed roadmap describing how they will achieve their near-term targets.

Sainsbury's and **Tesco** have set near-term emission-reduction targets across all scopes, including FLAG and non-FLAG emissions within Scope 3. Their near-term targets to reduce FLAG emissions are aligned with the Paris Agreement's ambition to limit global warming to 1.5 °C. By contrast, Asda has not yet publicly set a reduction target for 2030 and is currently revising its climate plan due to rapid growth. The supermarket is working on developing an updated climate plan aligned with the Paris Agreement.

With near-term target deadlines approaching, reporting progress towards targets and achieving actual emission reductions are crucial to contributing to the Paris Agreement's ambition to limit global warming to 1.5 °C.

Tesco provides financial support to its suppliers to help reduce their environmental impact.

The supermarket offers financial packages for farmers and has developed a sustainability-linked supply-chain finance programme to support suppliers in implementing strategies that reduce their environmental impact. In contrast, Asda and Sainsbury's do not include financial support for suppliers as a strategy to reduce indirect Scope 3 emissions in their climate plans. Direct investment in supply chains and financial support for implementing sustainable practices are essential for reducing total emissions.

Sainsbury's and Tesco are committed to becoming net-zero companies by 2050.

Asda acknowledges the need to reduce its emissions, taking into account the commitment of the EU and the UK government to reach net zero by 2050. It is essential that Asda formally commits to becoming a net-zero company by 2050 to align its climate plan with the goals of the UK. This is needed to ensure coordinated transition.

Asda and Tesco report emissions across all scopes, while Sainsbury's has not disclosed its Scope 3 emissions since its 2018/2019 baseline.

None of the supermarkets provides further detail on the composition of their current emissions, such as a breakdown of FLAG and non-FLAG emissions within Scope 3. Annual reporting on emission-reduction progress is essential to improve transparency and enable accountability in meeting climate targets.

Progress

None of the supermarkets show clear progress in reducing total emissions. No clear trend has yet emerged in Tesco's total emissions due to inconsistencies in reporting: emissions reported in 2024 cover all Scope 3 categories, whereas data from previous years are incomplete. Asda has increased its total GHG emissions since its 2015 baseline, although it has reduced emissions since 2022. Consequently, there is no clear trend yet in Asda's progress in reducing total emissions. Sainsbury's progress in reducing total emissions is unknown, as the supermarket has not reported its Scope 3 emissions since its 2018/2019 baseline.



PROTEIN TRANSITION



Sainsbury's and Tesco report their protein split in protein-rich food groups. They have reported this annually since 2022 and 2020 respectively, using the WWF method. Sainsbury's reported 13 per cent plant-based proteins in the protein-rich food group and seven per cent in the dairy alternatives group. Tesco reported nine per cent in the protein-rich food group and seven per cent in the dairy alternatives group.

by 2025 but does not explicitly aim to reduce sales of animal proteins. Due to the absence of quantitative targets, it is not possible to confirm whether their progress and ambitions are in line with the Planetary Health Diet.



None of the supermarkets in the UK in this report has set a specific target to increase the share of plant-based proteins in their sales. **Tesco** has set a goal to increase sales of plant-based meat alternatives by 300 per cent

How do UK supermarkets perform compared to other European supermarkets?

Sainsbury's and Tesco have set near-term reduction targets, with their FLAG emission-reduction targets aligned with the Paris Agreement. However, like the majority of European supermarkets, none of the UK supermarkets has disclosed a roadmap outlining how they will achieve their near-term targets.

Regarding the protein shift, Sainsbury's and Tesco are among the frontrunners in Europe, as they disclose their protein split. However, none of the supermarkets in the UK has set a target to rebalance protein sales in line with the Planetary Health Diet by 2050.

Similar to most of their European counterparts, Asda and Tesco report their total GHG emissions and provide a breakdown by scope but offer limited additional transparency. Sainsbury's is among the few European supermarkets that have not published their Scope 3 emissions in recent years. In fact, Sainsbury's is one of only three lagging European supermarkets that disclose only part of their total emissions.

Supermarket-specific recommendations

Asda

In European ranking: 22/27



- Set a near-term target for 2035 at the latest to reduce Scope 3 emissions in line with the Paris Agreement. Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report Scope 3 emissions annually, by scope and source (ie FLAG and non-FLAG). This is essential for establishing a concrete climate plan and tracking and reporting progress towards the near-term target.
- Include the protein transition in the climate plan to reduce indirect Scope 3 emissions.
 - Disclose the protein split based on total sales and within protein-rich food groups, according to the method most commonly used by supermarkets in the UK.
 - Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should align with the Planetary Health Diet and be set for the near term to support immediate implementation and action.

3 near-term target into quantified emission-reduction measures.

- Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Tesco

In European ranking: 11/27



- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope 3 near-term target into quantified emission-reduction measures.
- Report FLAG and non-FLAG emissions per category annually to identify the largest sources of emissions and align the roadmap accordingly. This is essential for establishing a concrete climate plan and tracking and reporting progress towards the near-term target.
- Set a target to increase the share of plant-based proteins and decrease the share of animal proteins in total sales and protein-rich foods. The target should be aligned with the Planetary Health Diet and set for the near term to support immediate implementation and action.

Sainsbury's

In European ranking: 17/27



- Report Scope 3 emissions annually and by source (ie FLAG and non-FLAG). This is essential for establishing a concrete climate plan and tracking and reporting progress towards the near-term target.
- Develop and publish a roadmap in line with the Paris Agreement, translating the Scope

Glossary

Near-term target

A near-term target is an emission-reduction target for 2035 or earlier. It is a key element in building a detailed climate roadmap. A near-term target is necessary for supermarkets to tackle emission reductions now and to be held accountable for reaching net zero by 2050, as determined by the European Union, Switzerland and the United Kingdom. Setting a near-term target is the starting point for drafting a detailed climate plan in line with the Paris Agreement.

Direct and indirect (Scope 3) emissions

The Greenhouse Gas Protocol defines three categories of emissions based on their origin and the extent of a company's control over them. Scope 1 emissions are direct emissions from sources owned or controlled by the supermarket, such as exhaust gases from vehicles or refrigerant gases. Scope 2 emissions are indirect emissions from the generation of purchased energy, such as electricity. Scope 3 emissions are all other indirect emissions (not included in Scope 2) occurring in the supermarket's supply chain, including upstream emissions (for instance, from agriculture or deforestation) and downstream emissions (for instance, from processing waste after consumption). For supermarkets, scope 3 emissions should be broken down into agriculture-related emissions (FLAG, for Forestry, Land Use and Agriculture) and industry-related emissions (non-FLAG).

1.5°C vs 'well below 2°C'

The Paris Agreement, signed in 2015, legally binds signatories to 'hold the increase in the global average temperature to well below 2 °C above pre-industrial levels and pursue efforts to limit the temperature increase to 1.5 °C above pre-industrial levels' (18). However, scientists stress the importance of limiting global

warming to 1.5 °C instead of 2 °C because of the irreversible consequences (19,20). Moreover, COP28 strengthened the case for limiting further global temperature rise to 1.5 °C rather than 'well below 2 °C' (21,22). Therefore, this Superlist defines a supermarket's near-term target as being in line with the Paris Agreement's ambition to limit further global warming to 1.5 °C.

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 (23). Validation of supermarkets' targets in line with 1.5 °C covers reduction targets for emissions in Scopes 1 and 2, and for Forestry, Land Use and Agriculture (FLAG) emissions in Scope 3. The organisation has developed a model that requires a baseline of 2015 or later. Moreover, the model cannot yet verify whether reduction targets for non-FLAG emissions in Scope 3 are in line with 1.5 °C. The organisation is working on a solution (24). In the meantime, the SBTi validates a Scope 3 target against the 'well below 2 °C' scenario (25).

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’. Rebaselining and reducing emissions can be done simultaneously.

Rebalancing protein sales to address climate change

Animal products account for half of all emissions from food production (23). 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 (6, 7). 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 (27). The protein transition should be seen as part of a broader shift towards a more balanced and sustainable diet.

Measuring the protein split

The protein split is a metric that indicates the share of plant-based protein sold in either the total sales volume or the volume of protein-rich foods sold. Protein-rich foods are for example meat, fish, eggs, dairy, legumes, nuts, hummus, plant-based meat substitutes and dairy plant-based alternatives. There are two main published methodologies supermarkets can use to measure this ratio: the Planet-Based Diets retail methodology developed by WWF (7) and The Protein Tracker developed by the Green Protein Alliance and ProVeg International (8). Both organisations call on food companies

to track the ratio of plant- and animal-based protein foods and to set goals for rebalancing food sales in line with the Planetary Health Diet. They work closely together to increase alignment, but a fair comparison of protein splits between the two methods is currently not possible because of differences in measurement units. The protein split in this diet is 60 per cent plant to 40 per cent animal foods when focusing on the protein-rich food group, as in the WWF method, and around 70 per cent plant to 30 per cent animal proteins when all food groups are included, as in The Protein Tracker (6). For comparability between supermarkets, the consistent use of a single methodology within a country is essential.

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Initiative and implementation

Questionmark Foundation

Authors

Deborah Winkel – project management and methodology

Gustaaf Haan – concept, methodology and analysis

Dore de Jong – methodology and data analysis

Willem van Engen-Cocquyt – software

Ambre Charles – data collection and analysis

Management

Charlotte Linnebank – general director,
Questionmark

Text and design

Nina Charbon – project management, final editing

Klaas van der Veen – design

Scientific council

Dr Ellen van Kleef – Wageningen University & Research

Dr Annet Roodenburg – HAS Green Academy
Professor Jaap Seidell – Vrije Universiteit Amsterdam

Dr Christian Schader – FiBL Switzerland

Dr Malin Jonell – Royal Swedish Academy of Sciences, the Stockholm Resilience Center and Stockholm University

Professor Janina Grabs – University of Basel

Questionmark



madre brava

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Questionmark

Questionmark Foundation

info@thequestionmark.org

www.thequestionmark.org

Overhoeksplein 2

1031 KS Amsterdam

The Netherlands

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