

Superlist Environment 2025

Netherlands, edition 3

Improved plans for
sustainability, little results
for climate and nature yet

SUPER
LIST 

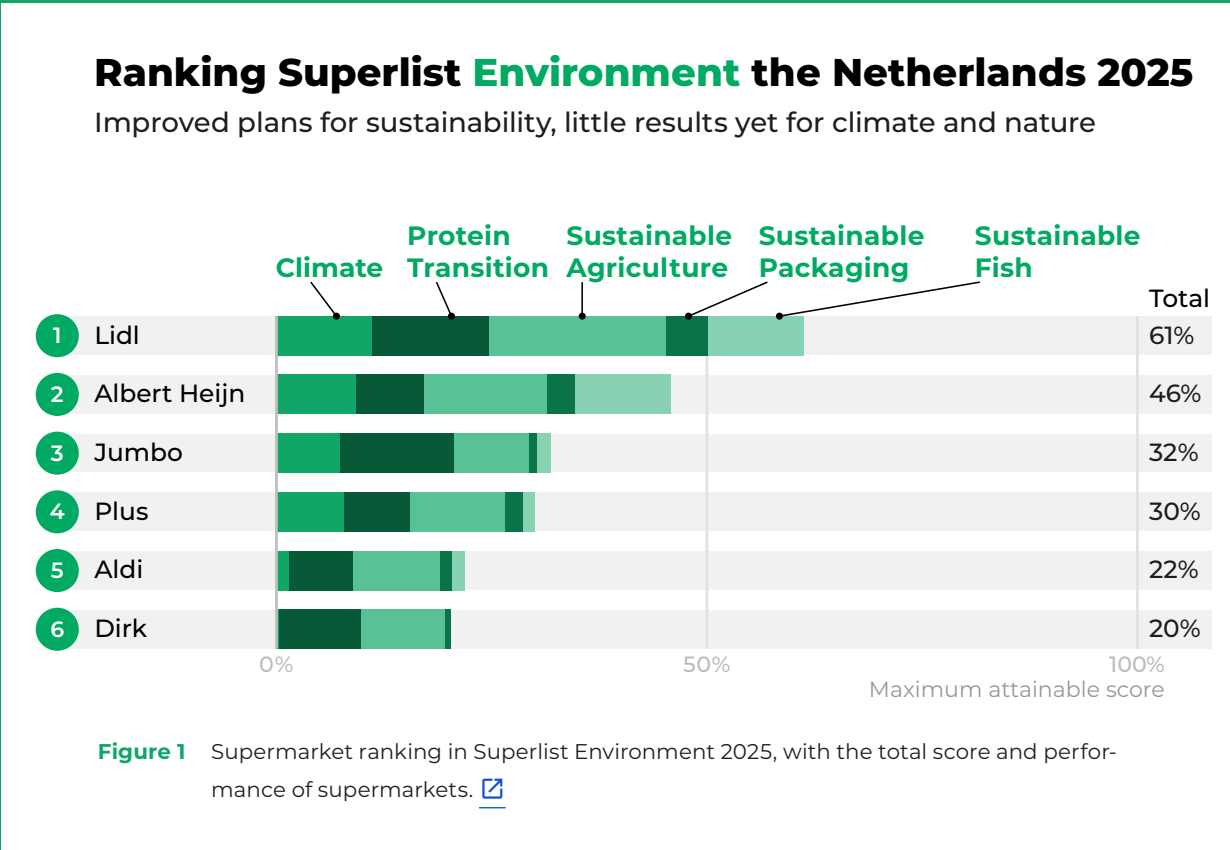
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SUMMARY SUPERLIST ENVIRONMENT 2025

Improved plans for sustainability, little results for climate and nature yet

Supermarkets are increasingly improving their sustainability plans. Several supermarkets have now developed roadmaps to achieve their climate targets. Almost all supermarkets have set goals to increase the share of plant-based and organic products in their sales. However, these ambitions have not yet translated into tangible results for climate and nature: supermarkets are not yet on track to the climate goals in line with the Paris Agreement. None of the supermarkets have been able to effectively prevent nature loss linked to soy cultivation. In the 2025 ranking, Lidl takes the lead, followed by Albert Heijn. Dirk lags behind the rest.



SUMMARY SUPERLIST ENVIRONMENT 2025

Mitigating climate change

First supermarkets have a climate roadmap, not yet on track to Paris-targets

Albert Heijn, Lidl and Superunie (the purchasing organisation for, among others, Dirk and Plus) are the first to publish a roadmap detailing how they expect to achieve their climate targets through a range of measures. Implementing these roadmaps is essential to meet climate targets in line with the Paris Agreement. The emissions figures do not indicate that this course has been set. At Aldi and Lidl, greenhouse gas emissions have even increased in recent years. Jumbo and Plus show a slight reduction in their emissions. Dirk is the only supermarket that does not report on its total emissions. In addition, Albert Heijn is the first to report its methane emissions separately — an important indicator for tackling global warming in the short term.

Protein transition

Sector recognises meat and dairy sales as a climate problem

Supermarkets are introducing individual measures to reduce the sale of animal-based proteins. Despite various measures to feature (slightly) fewer animal products in promotion leaflets, four out of five protein-rich products on offer are still meat or dairy. Several supermarkets have introduced hybrid products, combining animal- and plant-based proteins, and some now offer plant-based alternatives at equal or lower prices compared to their animal-based counterparts. No progress has been observed in the range of ready-made meals since 2021, whereas meat portion sizes have slightly decreased over the same period.

Sustainable agriculture

Organic increasingly important in policy for sustainable agriculture

All supermarkets provide insight into the share of organic products in their sales. For the first time, almost all supermarkets have also set a target to increase this share. Dirk, Lidl and Plus have targets covering their total sales, while nearly all supermarkets also have specific goals for the categories potatoes, vegetables and fruit.

In terms of deforestation, all supermarkets have committed to ensuring that their soy and palm oil supply chains are free from deforestation by the end of 2025. However, supermarkets still accept that producers compensate for deforestation linked to soy cultivation through sustainability certificates, instead of requiring that deforestation-free soy be physically segregated within the supply chain. Lidl is the only supermarket with a public action plan to achieve deforestation- and conversion-free soy in animal feed and palm oil.

Sustainable packaging

Albert Heijn and Lidl achieve subtargets for sustainable packaging

Targets set out in the Sector Plan for Sustainable Packaging and the Plastic Pact will expire at the end of 2025. Albert Heijn has achieved its reduction target for general packaging materials, and Lidl has met its reduction target for plastic packaging. However, no supermarket appears to fully meet the commitments on reduction, recyclability, and the use of recycled plastic.

Sustainable fish

Despite pledge non-sustainable fish remains in shelves

Since 2011, all supermarkets have committed to selling only certified fish. Despite this pledge, fish with known sustainability risks remains available on supermarket shelves. Albert Heijn, Aldi, Jumbo, Lidl and Plus report the current share of certified fish sold. Albert Heijn and Lidl are the only ones to specify which products are not yet certified. Albert Heijn, Dirk, Jumbo and Lidl have publicly committed to phasing out the sale of endangered Atlantic mackerel.

Preface



Charlotte Linnebank
Director
Questionmark

Questionmark

Since 2021, Questionmark has mapped how supermarkets take responsibility for the sustainability of the products they offer their customers. Supermarkets play a key role in this: they strongly influence what ends up in the shopping baskets of millions of Dutch consumers. In doing so, they have a direct impact on our health, the climate, and the preservation of nature and biodiversity.

I am very grateful to our societal partners, Milieudefensie and Mighty Earth, and to our Scientific Council, who provide support in mapping developments in the sector.

It is encouraging that supermarkets recognize their responsibility, continue to set ambitions, and provide accountability through sustainability reports. Yet in this third edition of Superlist Environment, we see limited to no progress in areas in which we had high hopes. This is particularly true for greenhouse gas emissions and the protein transition, where targets do not yet appear to be within reach. Progress also remains minimal in deforestation within soy and palm oil supply chains.

Full attention therefore remains necessary. But there is also reason for optimism: supermarkets now have access to data, practical recommendations, and best practices that can make a real difference. I look forward to new steps and breakthroughs in the coming two years.



Donald Pols
Director
Milieudefensie

Milieudefensie

There is still a sustainable world to be won by Dutch supermarkets. Customers simply want to shop for affordable and environmentally friendly groceries. Supermarkets must therefore take responsibility and adhere to the climate commitments of the Paris Agreement.

Unfortunately, supermarkets are still letting their customers down: the gap to Paris is only growing. It is unacceptable that some supermarkets still do not have a climate plan. And the plans that do exist often remain largely paper commitments. For example, Albert Heijn's emissions have increased by 17 percent since 2018.

The solutions are within reach: advancing the protein transition and establishing truly deforestation-free supply chains. Supermarkets have a key role in society: they can help customers eat healthier and have the influence to make agriculture more sustainable and climate-friendly. If supermarkets take climate and nature seriously, they will do everything possible to close the gap between words and deeds.



Jurjen de Waal
Director
Mighty Earth

Mighty Earth

By 2025 Dutch supermarkets would use only deforestation-free soy, but this has not been achieved. Although supermarkets have become more transparent about the origin of soy in their supply chains, they continue to rely on certifications that do not fully exclude deforestation. This is particularly concerning now, as the European Deforestation Regulation is under pressure and risks being weakened. Strong supermarket policies therefore remain crucial for protecting nature globally and combating climate change. A transition to more plant-based eating is indispensable in this context, since most soy is used as animal feed. Moreover, producing meat and dairy releases large amounts of methane, a very potent greenhouse gas that rapidly warms the Earth in the short term. Reducing methane emissions is therefore one of the most effective and cost-efficient ways to combat climate change. Albert Heijn is taking an important step by being the first supermarket in the world to report transparently on methane this year. Now it is up to other supermarkets to follow this example and develop concrete reduction plans.

About Superlist Environment

Supermarkets play a crucial role in daily life and are an indispensable part of modern society. Approximately three-quarters of the food that Dutch consumers eat daily is purchased from supermarkets. Supermarkets also have significant influence over how their suppliers produce goods and what their customers buy. This gives supermarkets the responsibility to demand more sustainable agricultural practices from suppliers and to encourage a sustainable diet among their customers. This combined influence and concentration in a handful of companies per country—often operating transnationally—makes supermarkets an exceptional leverage point in the food system.

What is Superlist?

Superlist, initiated by Questionmark, is an ongoing international research project that provides insight into how supermarkets help their customers eat in a healthy, sustainable, and fair way. The supermarkets included in this edition are Albert Heijn, Aldi, Dirk, Jumbo, Lidl, and Plus. This selection was chosen because they collectively represent over 80 percent of the Dutch market.

About Superlist Environment

This Superlist is a continuation of the first and second editions of Superlist Environment the Netherlands, published in 2021 and 2023 (Questionmark, 2024b; Questionmark, 2021) and the intermediary benchmarks on protein transition (Questionmark, 2024a) and Organic (Questionmark, 2025a). In Superlist Environment 2025, Questionmark again compares Dutch supermarkets to assess changes in sustainability performance.

Superlist Environment 2025 focuses on five themes: mitigating climate change, protein transition, sustainable agriculture, sustainable packaging and sustainable fish. The comparison criteria for this research (Questionmark,

2025b) were published on May 12th 2025, following consultations with supermarkets, the Scientific Council, and societal partners Milieudefensie and Mighty Earth. The data were collected by Questionmark between 12th May 2025 and 7th July 2025.

Research methodology

The [comparison criteria](#) for this Superlist were published on 12 May 2025, following consultation with supermarkets. Any data that could be interpreted in multiple ways, and any deviations from the research method, were submitted to the Scientific Council for review (see the link to the background report for further explanation).

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

Superlist Environment allows supermarkets to compare their sustainability efforts with those of their competitors and to learn from best practices. Additionally, Superlist provides concrete recommendations for improvement per supermarket. In this way, supermarkets can contribute to a more sustainable food system and enhance their positive impact.

Reading guide

Supermarkets that perform well on a specific indicator within the research are marked with the icon **this counts** in the margin.



MITIGATING CLIMATE CHANGE

First supermarkets have a climate roadmap, not on track to Paris Agreement targets

MOST NOTABLE FINDINGS

- The first supermarkets have developed a climate roadmap, detailing how they expect to achieve their climate targets.
- Supermarkets are not on track to meet the targets set in the Paris Agreement. At Aldi and Lidl, emissions have even increased.
- The majority of supermarkets are transparent about their current total emissions, with Dirk being the exception.

First climate roadmaps, Paris targets not yet in sight

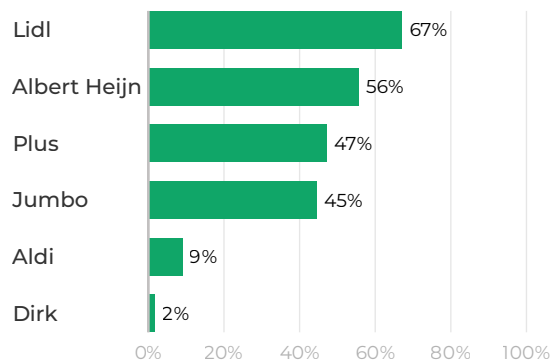


Figure 2 Supermarkets' efforts on mitigating climate change. [\[link\]](#)

From the farm to the moment food reaches the plate, supermarkets have significant influence - and therefore shared responsibility - to rapidly reduce emissions across the entire food production chain. This begins with insight into current emissions, setting a reduction target, and developing an action plan to achieve targets, with the ultimate goal of lowering emissions.

First supermarkets have developed detailed roadmaps to achieve their climate targets

To reach net zero, **Albert Heijn**, Dirk and **Plus** (via Superunie), **Jumbo** and **Lidl** have publicly set short-term targets for 2030 (AH, 2025c; Superunie, 2025b; Jumbo, 2025b; Lidl, 2025d), as recommended by the United Nations (UN, 2025a; UN, 2022). Although these short-term targets are not directly comparable due to different baseline years and varying target methodologies (e.g., broken down by FLAG and Energy & Industry, see text box "[Scope 1, 2 and 3 emissions](#)"), Albert Heijn and Jumbo aim for the largest emission reductions through their targets.





For the first time, **Albert Heijn** (via Ahold Delhaize), **Lidl**, and Superunie—the purchasing organisation for Dirk and Plus—have developed a climate roadmap, in which they calculate the reduction potential of various measures to achieve their short-term climate targets (Ahold, 2023; Lidl, 2025d; Superunie, 2025a). In addition, **Lidl** has developed a detailed plan for its long-term target.

Majority of supermarkets report total emissions, but Paris Agreement not yet in sight



All supermarkets, except Dirk, report their total current emissions. For **Albert Heijn**, **Jumbo**, **Lidl** and **Plus**, emissions in their baseline year are also available (see Figure 4). Overall, supermarkets are not on track to achieving the Paris Agreement targets. Since none of the supermarkets report from the 2019 baseline year (see text box “[Common baseline](#)”) and all supermarkets have only been reporting

consistently since 2022, it is not possible to say with certainty whether supermarkets are reducing their emissions in line with the Paris Agreement targets. The available data from the past three years, does show that Aldi and Lidl's greenhouse gas emissions have increased (see Figure 3). **Jumbo** and **Plus** have reduced their emissions. Albert Heijn's most recent emission figures do not yet show a clear decline. Its emissions have increased compared to its report in 2018. The Paris Agreement targets are therefore still not within reach.

Albert Heijn is the first supermarket to report separately on its methane emissions, a potent greenhouse gas with a relatively short atmospheric lifetime, meaning that reducing methane emissions can rapidly slow down global warming rapidly (CM & ME, 2025).



Supermarkets not on track to Paris targets

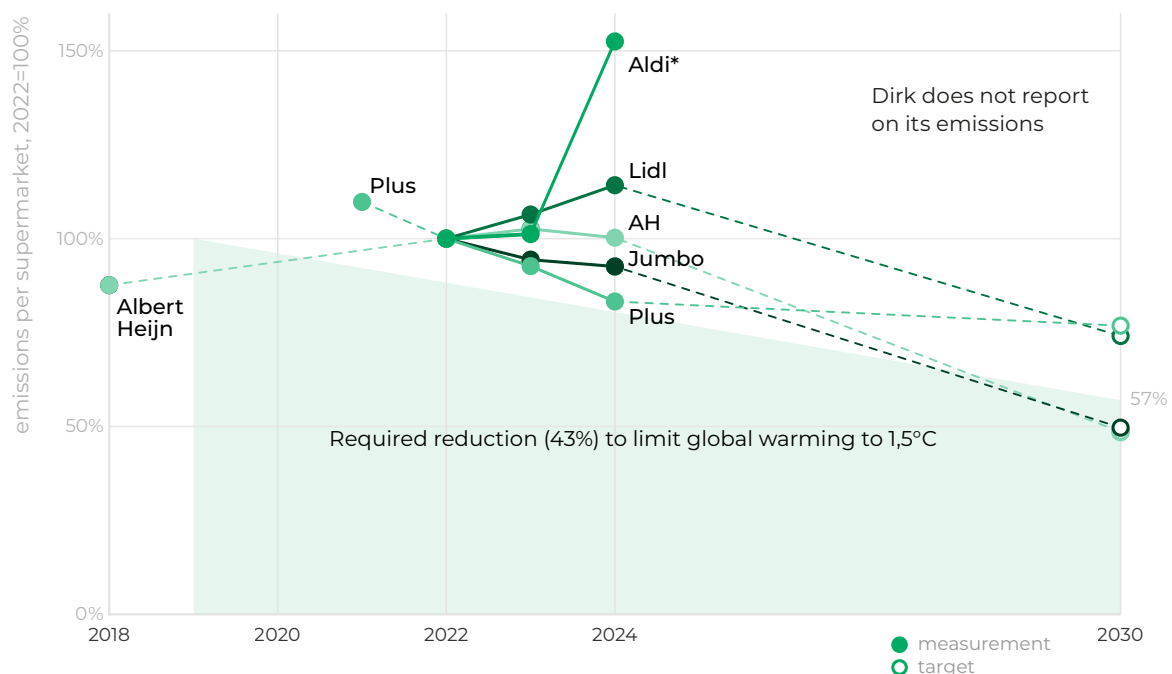


Figure 3 Difference in current emissions compared to 2022, the year in which all supermarkets started reporting their emissions.* [\[Link\]](#)

*The strong increase in emissions is partially explained by Aldi changing to a different measurement method

Scope 1, 2 en 3 emissions

- Scope 1: a company's direct emission (e.g., emissions from trucks)
- Scope 2: indirect emissions from the generation of purchased energy (e.g., electricity consumption, generation of electricity not owned by the supermarket)
- Scope 3: Indirect CO₂ emissions in the company's value chain, both upstream (e.g., transport of raw materials) and downstream (e.g., waste processing). Split into:
 - FLAG (Forestry, Land and Agriculture): emissions from forestry, land use, and agriculture
 - Non-FLAG (Energy and Industry): emissions from industrial processes

All of the above emissions fall under the responsibility of the supermarket. The vast majority of supermarket emissions are in Scope 3.

Common baseline

The year 2019 is the baseline year typically used to measure progress toward the climate targets of the Paris Agreement. Not all supermarkets have yet disclosed their emissions for 2019. While it is never too late to start reporting, without comparison to the same baseline year, it is much harder to assess whether emission reductions at supermarkets are sufficient to meet the Paris Agreement targets according to the IPCC¹ "no or limited overshoot" 1.5°C pathway. In almost all cases, companies can still calculate their 2019 emissions retroactively. If a company has undergone structural changes—such as mergers or acquisitions—the Greenhouse Gas Protocol provides guidelines for 'rebaselining'. Rebaselining and emission reduction can occur simultaneously.

¹ IPCC is an abbreviation for Intergovernmental Panel on Climate Change.

Supermarkets elaborate climate plans

			Albert Heijn	Aldi	Dirk	Jumbo	Lidl	Plus		
1. Reporting	Current emissions	Scope 1 and 2	●	●	●	●	●	●	Albert Heijn is the only one reporting on methane emissions. Dirk is the only not to report on emissions.	
		Scope 3	●	●	●*	●	●	●		
	Split current emissions	FLAG / Non-FLAG	●	●	●	●	●	●		
		Methane	●	●	●	●	●	●		
	Baseline emissions		●	●	●	●	●	●		
2. Targets	Short term target 2030		●	●	●	●	●	●	Lidl is the only one to develop long term plans to reduce emissions.	
	Long term target 2050		●	●	●	●	●	●		
3. Climate roadmap	Short term		●	●	●*	●	●	●*		
	Long term		●	●	●	●	●	●		

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

* through Superunie policy

PROTEIN TRANSITION

Sector recognises meat and dairy sales as a climate problem

MOST NOTABLE FINDINGS

- Supermarkets are experimenting individually with measures to reduce the share of animal-based products in sales.
- The share of plant-based meals in the assortment remains unchanged, although there has been a slight decrease in the share of large meat portions.
- The vast majority (85 percent) of protein-rich promotions are still for animal-based products.

Sector recognises meat and dairy as climate problem

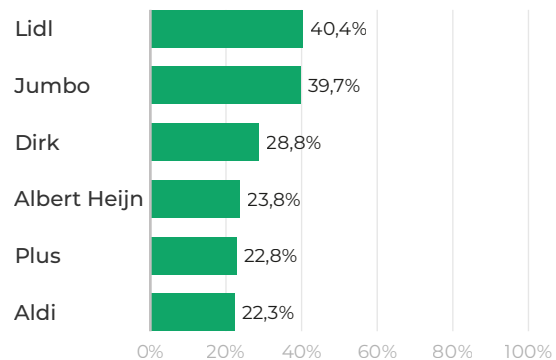


Figure 5 Supermarkets' efforts on protein transition. [\[link\]](#)

The protein transition is the gradual reduction of animal-based foods in our diet. A greater share of plant-based protein is better for both health and the planet. Supermarkets play a major role in this by making meat and other animal products less of a standard. Since livestock farming accounts for a large share of supermarket emissions, the protein transition is also essential for supermarkets to achieve their climate goals.

Supermarkets are experimenting individually with measures to reduce the share of animal-based

All supermarkets have set a target to sell 60 percent plant-based proteins by 2030 (Albert Heijn, 2025; Aldi, 2025c; Dirk, 2025c; Jumbo, 2025d; Lidl NL, 2024; Plus, 2025b). Since Superlist Environment 2023, Dutch supermarkets have been reporting the current share of animal- and plant-based proteins in sales according to the [Protein Tracker](#) (GPA & ProVeg, 2025). The balance between plant- and animal-based proteins in sales has changed little since 2023 (see Figure 6).

Since 2024, supermarkets have been experimenting with various initiatives. **Albert Heijn, Dirk, Jumbo** and **Lidl** are introducing hybrid products, combining meat with plant-based proteins. **Aldi, Jumbo** and **Lidl** offer



Share of plant-based protein in sales mostly unchanged

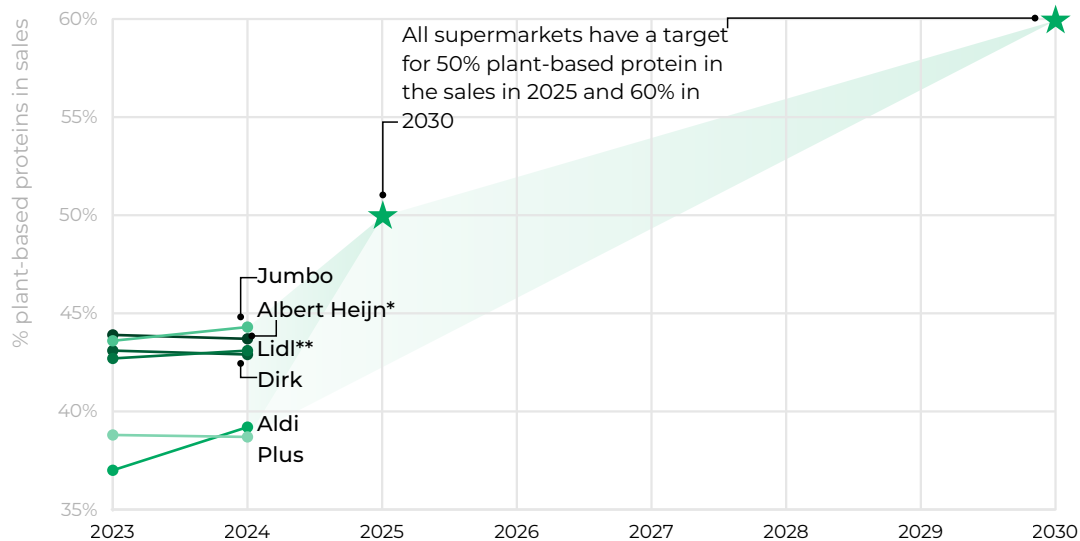


Figure 6 Development of the share of plant-based and animal-based proteins in supermarket sales in view of the targets that have been set. [\[link\]](#)

* Report on 78% of total sales volume
**Report on more than 90% of total sales volume



plant-based alternatives at equal or lower prices than the animal-based product. At **Lidl**, 50 percent of main meal recipes on the website are vegetarian.

Share of plant-based meals in the assortment remains unchanged. Slight decrease in the share of large meat portions

Of the ready-made meals, more than 90 percent still contain animal-based ingredients such as meat or fish, dairy, cheese, or eggs (see Figure 7). Additionally, more than

Still 90% of ready-made-meals are animal-based

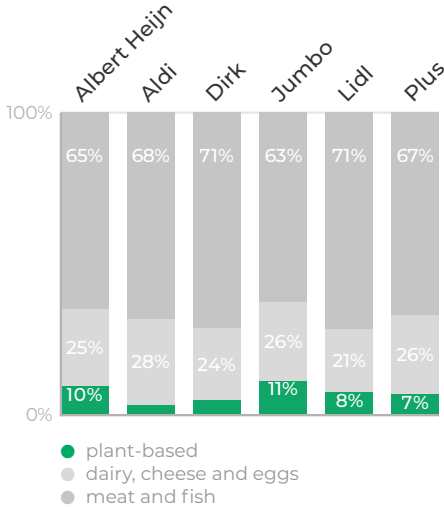


Figure 7 Composition of ready-made-meals [\[link\]](#)

Meat portions slightly less big in 4 years

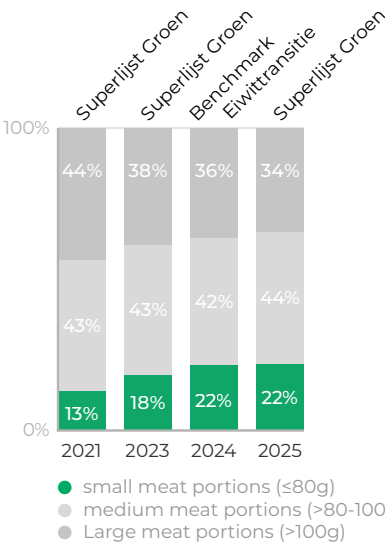


Figure 8 Development of meat portions since 2021 [\[link\]](#)

three-quarters (78 percent) of the examined meat portions are larger than 80 grams. Supermarkets have slightly reduced meat portion sizes over the past two years (see Figure 8). This is mostly because there are less meat products of less than 100 grams.

Supermarkets are exploring measures in promotional leaflets, yet 85 percent of protein-rich promotions remain animal-based



Dirk, Jumbo, Lidl, and Plus have initiatives to reduce animal-based products in their leaflets. For example, Dirk no longer features meat promotions on the front and back pages of the leaflet, Jumbo has stopped temporary price promotions on fresh meat, Lidl has a fully meat-free leaflet twice a year, and Plus aims for 25 percent fewer meat promotions in 2024 compared to 2023 (Dirk, 2025c; Jumbo, 2025b; Lidl, 2025c; Plus, 2024).



Despite these efforts, on average 85 percent of all protein-rich promotions in leaflets are still animal-based. **Jumbo** has the lowest share of animal-based protein promotions at 71 percent (see Figure 9). Jumbo reports a slight positive effect on the share of plant-based proteins sold as a result of ending temporary price promotions on fresh meat. At the same time, Jumbo has the largest share of bulk promotions for animal-based protein products, covering two-thirds of these products (see Figure 10 and text box “Multi-buys”).

Figure 10 Compared to other supermarkets, the share of plant-based promotions is higher at Jumbo (left), simultaneously animal products are often offered as multibuys in the flyer (right).



More than 4 out of 5 protein rich promotions is animal-based

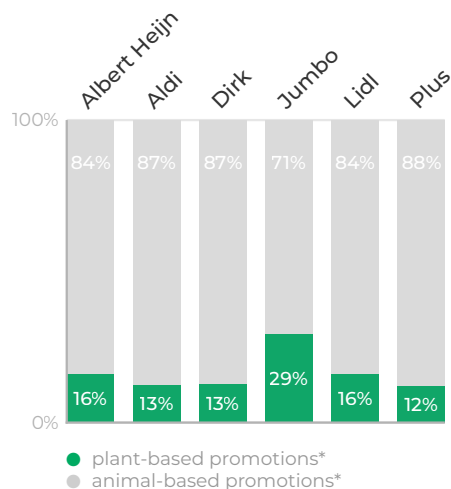


Figure 9 Plant-based and animal product promotions on average over 8 weeks. [🔗](#)

* Animal-based promotions consist of an animal core and plant-based promotions of a plant-based core, based on the Protein Tracker methodology.

Multi-buys

Sometimes, a customer only receives a discount when purchasing more than one product. Typical examples include “buy 4, pay for 3” or “buy 1, get 1 free.” Multi-buy promotions encourage people to buy more of a product than they had planned. Scientific research shows that people then consume the extra amount more quickly than they normally would (PHE, 2020). This is not only detrimental to customers' wallets and health—since these products are often unhealthy—but also harmful to the environment. Each additional product generates extra emissions from land use, production, and packaging.



ORGANIC AGRICULTURE

Organic increasingly important in policy sustainable agriculture

MOST NOTABLE FINDINGS

- Almost all supermarkets have set a target to sell more organic products.
- Supermarkets are mostly unable to guarantee deforestation-free sourcing of soy in animal feed, despite their pledges.
- For many products, supermarkets still do not set high sustainability standards as a default requirement for their suppliers.

Organic increasingly important in policy sustainable agriculture

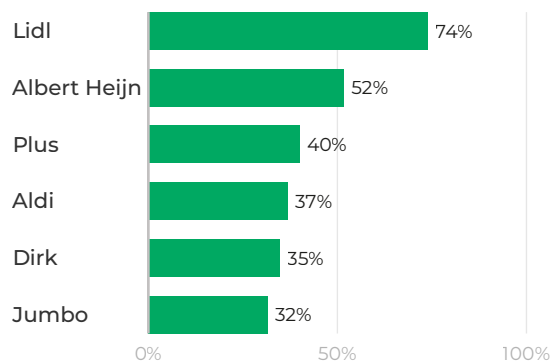


Figure 11 Supermarkets' efforts on sustainable agriculture. [\[link\]](#)

Agriculture must become more sustainable in the coming years. The Dutch government is therefore promoting circular agriculture, which helps preserve nature and biodiversity. In the major task of making (Dutch) agriculture more sustainable, supermarkets can play a crucial role by requiring their suppliers to adopt sustainable farming practices—and by compensating any additional costs associated with these practices.

Almost all supermarkets have a target to sell more organic

Since last year, **all supermarkets** provide insight into the share of organic products in total sales (AH, 2025c; Dirk, 2025c; Jumbo, 2025a; Lidl, 2025a; Plus, 2025a). Currently, this share is largest at Albert Heijn, just over 5 percent (see Figure 12). The share of organic products in private-label assortments is considerably higher than in branded products. Since 2023, only minimal changes (less than one percent) have been observed in the development of organic shares at Albert Heijn, Dirk, and Lidl.

Dirk, Lidl, and Plus have set targets to increase the share of organic products in total sales. However, these targets – a maximum of five percent organic in total sales– remain low



Almost all supermarkets have a target for the growth of organic in sales

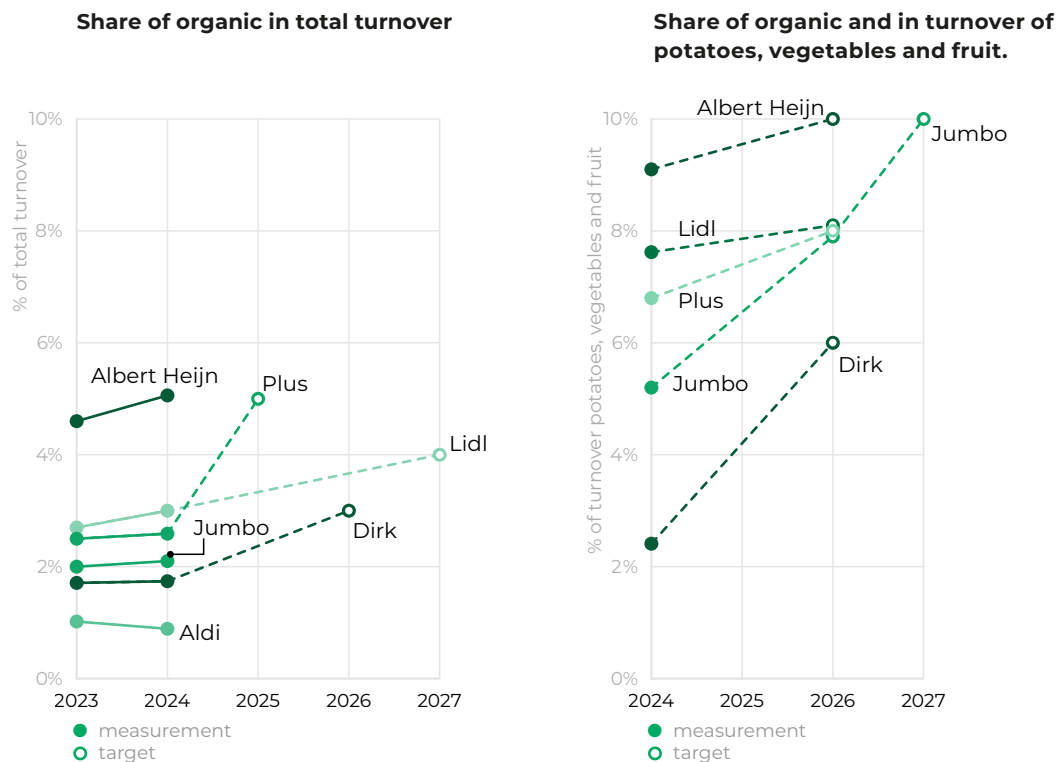


Figure 12 Share of organic in total turnover and turnover of potatoes, vegetables and fruit. [\[link\]](#)

compared with the Dutch government's target, which aims to increase organic farmland to 15 percent of all agricultural land by 2030.



Albert Heijn, Dirk, Jumbo, Lidl, and Plus also have subtargets to grow the share of organic products in potatoes, vegetables, and fruit. In addition, **Dirk** provides detailed reporting and subtargets for bread, grains and cereal products, eggs, meat, processed meat and poultry, and dairy products.

Vast majority of soy in animal feed still linked to deforestation and nature loss

All supermarkets have committed to ensuring that their soy and palm oil supply chains are deforestation-free by the end of 2025 (AH, 2025c; Aldi, 2025a; Superunie, 2025b; Jumbo, 2025c; Lidl, 2025a; Plus, 2025c). They all apply a 2020 cut-off date,

Deforestation law EUDR

The European Union Deforestation Regulation (EUDR) will come into force at the end of 2025 (NVWA, 2025) and aims to prevent deforestation and forest degradation linked to European food production. From 30 December 2025 onwards, supermarkets and other companies will no longer be allowed to put products on the market that contribute to these impacts. The regulation requires companies to have knowledge of the origin of products and raw materials through geolocation, rather than relying solely on third-party certification. The EUDR applies to seven commodities: cocoa, coffee, timber, soy, palm oil, rubber, and beef.

Cut-off date

As part of the EUDR, products must not originate from areas deforested after 31 December 2020.

Land conversion

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

Majority soy in animal feed not yet deforestation-free

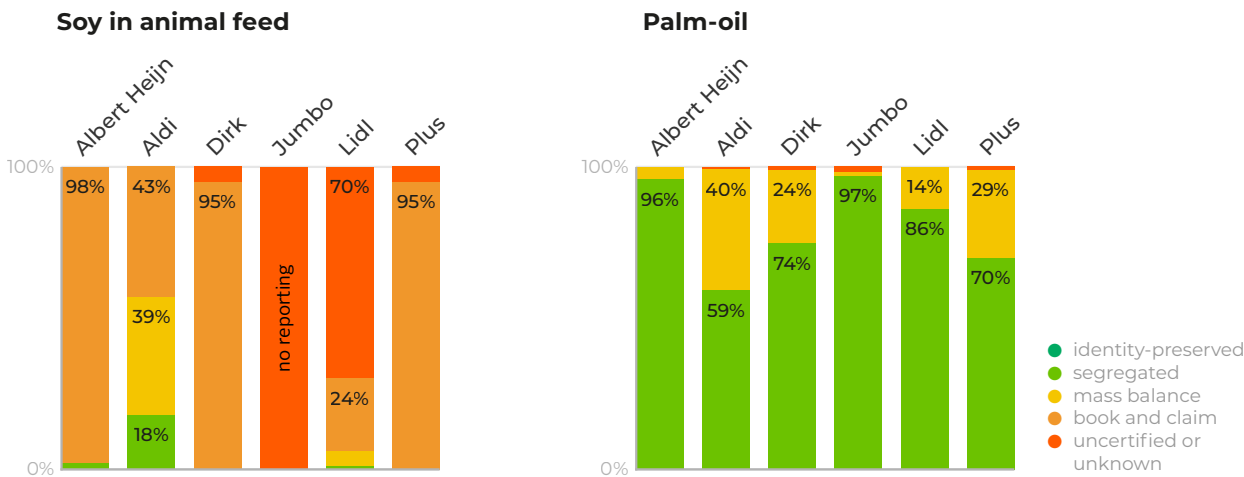


Figure 13. Levels of deforestation- and conversion free soy in animal feed per supermarket

ensuring that products do not originate from areas deforested after 2020, in line with upcoming European Deforestation Regulation (see textbox 'Deforestation law EUDR'). In addition, **all supermarkets** have committed to avoiding land conversion for soy cultivation (for example, the conversion of savannahs into farmland). For palm oil, this commitment is specifically made by **Albert Heijn, Lidl, and Plus**. **Lidl** maps risks for soy and palm oil per country of origin (Lidl, 2025f; Lidl, 2025e). Lidl has also developed an action plan for implementing its deforestation- and conversion-free policy across all suppliers (Lidl, 2025f). **Albert Heijn** and **Lidl** provide insight into the level at which they can guarantee the origin of deforestation- and conversion-free soy in animal feed and palm oil (see textbox 'Guarantee of Origin') (AH, 2025c; Lidl, 2025f). **Jumbo, Dirk, and Plus** (through Superunie) report on this through the annual progress reports of the Round Table on Responsible Soy (RTRS, 2023; RTRS, 2024a; RTRS, 2024b). For palm oil, **Jumbo, Dirk, and Plus** (via Superunie) also disclose their performance through the WWF Palm Oil Scorecard (WWF, 2025).

Garantie van oorsprong

1 Book and claim certificates

Buyers can offset emissions from soy with sustainably produced soy from elsewhere. However, the actual product is not guaranteed to be deforestation-free. These type of certificates do not provide traceability and allows deforestation-free soy to be certified more than once.

2 Mass balance certificates

Sustainably produced soy is mixed with soy for which land may have been deforested, while the proportion of sustainable soy in the mix is known.

3 Segregated certificates

Sustainably produced soy is kept physically separate from soy that may have come from deforested land throughout the chain. This provides a higher degree of traceability. The exact place of production or cultivation is unknown for individual products.

4 Identity preserved certificaten

The origin and environmental benefits of the produced soy are tracked individually and unchanged throughout the entire chain. The origin and production method is known for each individual product.

Deforestation-free palm oil is already commonly claimed as being physically segregated from palm oil that is not deforestation- and conversion-free. For soy, however, most supermarkets rely on book and claim certificates, which allow buyers to offset the CO₂ emissions associated with soy-related deforestation (see figure 13 and textbox 'Guarantee of Origin').

Supermarkets do not yet impose high sustainability standards on all their suppliers

Many suppliers of popular products such as milk, bread or apples are not yet required to meet a sustainable farming standard by supermarkets. For most product types, supermarkets do offer organic or other top-certified options, but almost always also sell products without such a label. In doing so, supermarkets stop short of taking full responsibility for supporting the transition to more sustainable agriculture.

Only a few product categories are fully covered with sustainably produced products. **Lidl** takes the greatest responsibility, offering the most categories exclusively with products that carry a top sustainability label (see Figure 14). This includes, for example, apples, tomatoes and carrots.

Albert Heijn, Aldi, Dirk, Jumbo and **Plus** sell only top-certified kilogram bags of potatoes; at Plus these are organic potatoes. **Albert Heijn, Aldi, Jumbo** and **Lidl** offer only top-certified strawberries. All cow's milk at **Aldi, Lidl** and **Plus** is top certified. **Aldi** is also the only supermarket that sells only top-certified coffee, black tea and chocolate bars.

For several focus products, the research looked specifically at whether supermarkets offer an organic option or sell exclusively organic products. These focus products (see Figure 15) have large cultivation areas, high sales volumes and/or play an important role for consumers not yet accustomed to buying organic food. For many of these products, customers

High sustainability standards not yet the norm

		Albert Heijn	Aldi	Dirk	Jumbo	Lidl	plus
Animal	Fresh cow's milk	●	●	●	●	●	●
	Yoghurt	●	●	●	●	●	●
	Cheese	●	●	●	●	●	●
	Eggs	●	●	●	●	●	●
	Minced beef	●	●	●	●	●	●
	Chicken breast	●	●	●	●	●	●
	Pork	●	●	●	●	●	●
Fresh fruit	Apple	●	●	●	●	●	●
	Banana	●	●	●	●	●	●
	Pear	●	●	●	●	●	●
	Kiwi	●	●	●	●	●	●
	Melon	●	●	●	●	●	●
	Grapes	●	●	●	●	●	●
	Strawberries	●	●	●	●	●	●
Fresh vegetables	Onion	●	●	●	●	●	●
	Red bell pepper	●	●	●	●	●	●
	Tomato	●	●	●	●	●	●
	Cauliflower	●	●	●	●	●	●
	Brown beans	●	●	●	●	●	●
	Broccoli	●	●	●	●	●	●
	Cucumber	●	●	●	●	●	●
	Carrot	●	●	●	●	●	●
	Potatoes (1kg)	●	●	●	●	●	●
Other	Potatoes (≥1,5kg)	●	●	●	●	●	●
	Bread	●	●	●	●	●	●
	Pasta	●	●	●	●	●	●
	Rice	●	●	●	●	●	●
	Chocolate bars	●	●	●	●	●	●
	Filter coffee and -pads	●	●	●	●	●	●
	Black tea	●	●	●	●	●	●
		●	●	●	●	●	●

Relatively few fruits sustainably certified in the assortments

● no option for environmentally top-certified product
 ● option for top certified product
 ● exclusively top-certified products

Figure 14 Sustainable assortment in different product types per supermarket. [↗](#)

this counts

this counts



can choose an organic option. **Plus** takes full responsibility in one category – kilogram bags of potatoes – by offering only organic products. The supermarket applies the same policy to its private-label milk, buttermilk and yoghurt. This is not reflected in the table below, as Plus still offers non-organic A-brand products in these categories.

Increasing transparency on origin and production



Just like in 2023, **Albert Heijn** and **Lidl** are full transparent on the share of certified products in their sales, as well as the origin, transport and cultivation methods of fruits and vegetables (AH, 2025c; AH, 2025a; Lidl, 2025g). Since 2025, **Plus** reports on the share of certified products and the transport methods of fruits and vegetables (Plus, 2025b), **Aldi** is transparent about transport methods (Aldi, 2025c), and **Dirk** disclosed the origin as well as the cultivation and transport methods for potatoes, fruits and vegetables, but only after the data collection ended (Dirk, 2025d).



The majority of fresh vegetables are sourced from the Netherlands at Albert Heijn, Dirk and Lidl. In contrast, more than half of Albert Heijn’s fresh fruit comes from outside Europe (55 percent), while at Lidl this is 44 percent. Lidl no longer imports fruits and vegetables by air. At Albert Heijn, Dirk and Plus, a small share of fruits and vegetables is still air-freighted.

Most supermarkets offer choice for organic product

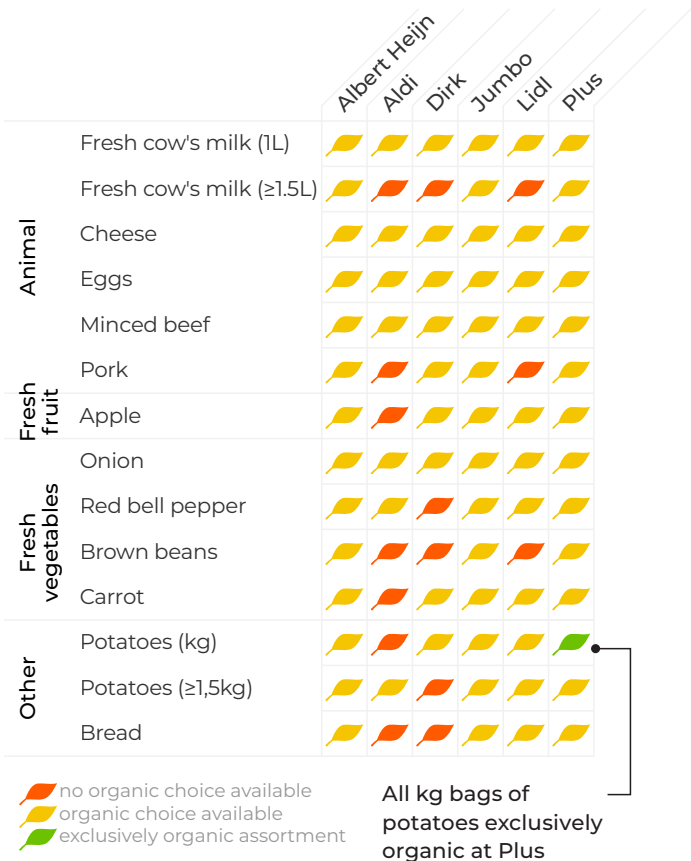


Figure 15 Organic assortment in different product types per supermarket



SUSTAINABLE PACKAGING

Albert Heijn and Lidl achieve subtargets for sustainable packaging

MOST NOTABLE FINDINGS

- Most supermarkets are unlikely to meet packaging reduction targets in 2025.
- Albert Heijn is the only supermarket to achieve the subtarget for overall packaging reduction.
- Lidl is the only supermarket expected to meet the subtarget for reducing plastic packaging of private-label products.

Supermarkets largely lag behind on packaging target

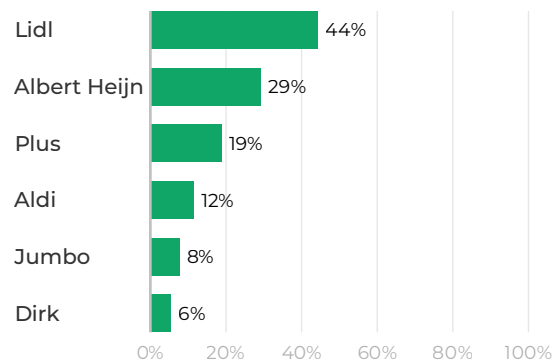


Figure 16 Supermarkets' efforts on transparency and progress on sustainable packaging. [\[link\]](#)

If current trends continue, plastic waste is projected to triple by 2060, with significant consequences for both human health and the planet. Reducing the volume of new single-use packaging is essential. As major contributors to packaging waste, supermarkets bear a responsibility for helping to address this issue.

Packaging targets generally not met

All supermarkets have committed to working towards the reduction target for overall packaging material set out in the Sector Plan for Sustainable Packaging (see textbox 'Targets for 2025') (AH, 2025d; Aldi, 2025b; Dirk, 2025a; Jumbo, 2025d; Lidl, 2025b; Plus, 2025d). This aims for a 20% reduction in packaging material by 2025. However, none of the supermarkets use the official baseline year of 2017, making it unclear whether they will meet the targets. Reporting from **Dirk**, **Lidl** and **Plus** shows that, using their self-chosen baseline of 2020, they are behind schedule to achieve a 20% reduction in private-label packaging by the end of 2025. **Albert Heijn** is the only supermarket to have already met the target, using a baseline of 2018.





Regarding the targets of the Plastic Pact (see textbox 'Targets for 2025'), most supermarkets focus solely on the goal of using 35 percent recycled plastic in products and packaging they bring to market from 2025 onwards. At the start of 2025, **Albert Heijn** had already achieved over 32% recycled plastic in private-label packaging (up from 28% in 2022) (AH, 2025c), while **Lidl** reported 23 percent in private label packaging (19% in 2022) (Lidl, 2025b). **Dirk** and **Plus**, reporting via Superunie, had only 4 percent recycled plastic in private-label products in 2024, with the 2025 target set at 35 percent (Superunie, 2025b). **Albert Heijn** and **Lidl** have committed to the target of 100% recyclable single-use plastic packaging for private-label products and report on progress. Both are currently behind schedule to meet the target by the end of 2025.

Albert Heijn and Lidl achieve packaging subtargets

Albert Heijn is the only supermarket to have already met the target of a 20% reduction in packaging material, using a baseline year of 2018 (AH, 2025c).

Lidl is the only supermarket to report progress on the Plastic Pact target of reducing plastic by 20 percent by 2025 compared with 2017. At the start of 2025, Lidl had already achieved a 35 percent reduction in plastic in private-label packaging compared with 2017 (Lidl, 2025b), thereby meeting its plastic reduction target for private-label products.



Targets for 2025

Supermarkets have committed to two packaging agreements

Plastic Pact

This agreement was established in 2019 by a large number of Dutch companies, including all supermarkets in Superlist as well as companies outside the supermarket sector, and focuses exclusively on plastic. The 2025 targets are:

- 20 percent less plastic compared with 2017
- 100 percent recyclable single-use packaging
- Plastic packaging contain 35 percent recycled plastic

Sector Plan for Sustainable Packaging 2019-2025

This plan was developed specifically by supermarkets in 2019 and covers packaging in general. The main 2025 target is:

- 20 percent reduction in packaging material compared with 2017

New packaging targets

The targets set in the Sector Plan and the Plastic Pact expire at the end of 2025. It is therefore crucial that supermarkets individually commit to new targets to further reduce packaging material. Lidl has established new internal targets for 2030, using 2023 as the baseline (source). Jumbo has also stated that it is working on new packaging targets for the period after 2025 (Jumbo, 2025d).

SUSTAINABLE FISH

Despite pledge non-sustainable fish remains in shelves

MOST NOTABLE FINDINGS

- Despite their commitment to 100% certified fish, supermarkets continue to sell fish with known sustainability risks.
- Albert Heijn and Lidl report on fish products for which such risks are identified.
- Albert Heijn, Dirk, Jumbo and Lidl have committed to stop selling the endangered Atlantic mackerel.

Big differences in transparency on fish in shelves

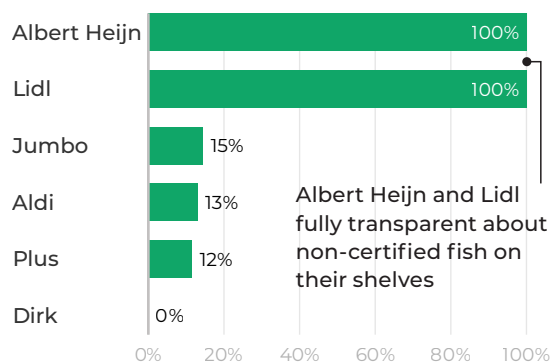


Figure 17 Supermarkets' efforts on transparency in certified fish. [\[link\]](#)

Over ten years ago, supermarkets pledged to apply ASC and MSC standards as a minimum for all fish in their assortment. ASC and MSC are labels for more sustainable fishing and aquaculture. ASC applies to farmed fish and promotes responsible fish production, while MSC applies to wild-caught fish and focuses on sustainable fisheries.

Albert Heijn and Lidl reveal which products don't meet the 100 percent commitment for certified fish

Since 2011, Albert Heijn, Jumbo, Dirk and Plus have pledged to sell only ASC- and MSC-certified fish (Volkskrant, 2007). **Albert Heijn, Jumbo, Lidl** and **Plus** are transparent about the current share of their fish sales that is certified (see figure 18) (AH, 2025b; Jumbo, 2025e; Lidl, 2025h; Plus, 2025c). For all of these supermarkets, the large majority of their fish is certified.

Albert Heijn and **Lidl** are the first supermarkets to provide an overview of which fish is not yet certified. At Albert Heijn, this includes tuna, octopus, sardines, salmon, mackerel and shrimp. At Lidl, it concerns fresh mackerel, canned mackerel and canned tuna, as well as various products in temporary promotional



assortments (AH, 2025b; Lidl, 2025h). Since April 2025, the Good Fish Foundation has issued warnings about overfishing of mackerel (Good Fish, 2025). Albert Heijn, Jumbo and Lidl have publicly committed to stopping the sale of Atlantic mackerel (NU.nl, 2025). Dirk too has also indicated that it will cease selling this fish once existing contracts expire (Dirk, 2025b).



Not all fish certified yet

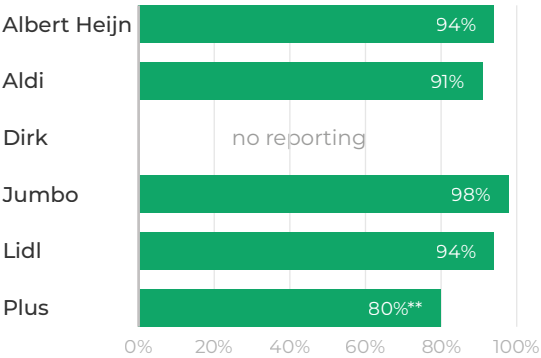


Figure 18 Share of certified* fish in supermarket sales. [🔗](#)

* Certified fish stands for ASC, MSC, GGN or organic certification, or green in the Fish Guid.

** Aldi and Plus report the share of ASC, MSC and organically certified, excl. the share of green in the Fish Guide and GGN certified, which makes their numbers possibly lower than other supermarkets

RECOMMENDATIONS

General recommendations

Superlist Environment aims to provide insight into which supermarkets are actively contributing to nature conservation and a healthy environment, and which are lagging behind. It also seeks to raise awareness among Dutch supermarkets of their responsibility, show them where they currently stand, and encourage

further action. Based on a comprehensive analysis of supermarket performance, we provide both sector-wide and supermarket-specific recommendations to help supermarkets contribute to a more sustainable food system.

Recommendations for all supermarkets

MITIGATING CLIMATE CHANGE

→ Establish a climate roadmap

A roadmap specifies which measures the supermarket expects to implement in order to achieve its climate targets in line with the Paris Agreement. For both the short-term targets (by 2030) and the long-term targets (net-zero by 2050), it must be clear how the supermarket expects to reach these goals. Ensure that such a roadmap is SMART: Specific, Measurable, Ambitious, Realistic, and Time-bound.

→ Include multiple measures in the roadmap that deliver results within a year

To achieve the short-term targets for 2030, actions with immediate impact are required. This also leaves room to adjust the roadmap in 2026 if the effectiveness of the measures proves insufficient.

PROTEIN TRANSITION

→ Take joint measures to reduce the sale of animal protein.

Competition between supermarkets leaves little room for individual supermarkets to effectively curb the sale of animal proteins.

To level the playing field, supermarkets will need to act collectively—either by making mutual agreements or by asking the government to enforce the necessary measures.

SUSTAINABLE AGRICULTURE

→ **Take responsibility for making agriculture more sustainable by offering organic products.**

Make organic products the easy—or even the only—choice. Avoid product variants that are not covered by an organic or other top certification or sourcing policy.

- 1 Set organic as the standard for a selection of products or categories within fresh produce (potatoes, vegetables, fruit), for example, onions, carrots, and potatoes.
- 2 Extend organic targets to dairy/cheese, following the approach in fresh produce. Sustainability improvements in this category have a relatively large impact on Dutch agricultural land.
- 3 Engage A-brand suppliers on their shared responsibility to increase the availability of organic products. Data from supermarkets show that the share of organic products is much lower among A-brand products than in private-label offerings.

→ **Ensure deforestation- and conversion-free supply chains.**

No longer consider book-and-claim certificates as a means to achieve deforestation-free supply chains. From the end of 2025 onward, only allow soy and palm oil that comply with the European Deforestation Regulation (EUDR) for both forested and non-forested areas and are minimally covered by a segregated certificate.

SUSTAINABLE PACKAGING

→ **Set new individual targets to reduce packaging material.**

Establish new targets for reducing (plastic) packaging material. Ensure that reporting includes the baseline year and provide annual updates on progress. Also report the absolute volumes of packaging material, including plastic, in relation to the reduction targets. Learn from the implementation of refill systems in other European countries.

SUSTAINABLE FISH

→ **Develop an action plan to eliminate unsustainable fish from the shelves.**

Map out which fish in the assortment do not score “green” on the Seafood Guide and create a plan to ensure that these fish are only purchased with certification.

RECOMMENDATIONS

Supermarket specific recommendations

Albert Heijn



→ **Specify measures in the climate roadmap that have an impact within one year.**

Ahold Delhaize's roadmap provides a good starting point for reducing emissions. To achieve the short-term targets for 2030, measures are needed that have an immediate effect. This also allows room in 2026 to adjust the roadmap if the effectiveness of the measures falls short.

→ **Take the lead in collaborating on the protein transition.**

To reach protein targets, all supermarkets need to implement rigorous measures. Many far-reaching actions, such as ending meat promotions, are only effective if

implemented collectively. As the market leader in the Netherlands, Albert Heijn can take the lead by coordinating measures with other supermarkets or by requesting government regulation.

→ **Set a target for the share of organic products in total sales and within dairy.**

Albert Heijn has not yet set a target to increase the share of organic products in total sales. Furthermore, the organic target currently set by Albert Heijn does not include dairy products—a category where significant gains can be made for the Dutch agricultural area.

Aldi



→ **Set a short-term target to halve total emissions, including scope 3, in line with the Paris Agreement.**

A reduction target for total emissions, including scope 3, is essential. Report progress toward this target annually and implement short-term measures to reduce emissions.

→ **Collaborate with other supermarkets to achieve the plant-based protein target.**

To reach the 60 percent plant-based protein target, all supermarkets need to implement rigorous measures. Many far-reaching actions, such as ending meat promotions,

are only effective if implemented collectively.

→ **Set a target for increasing the share of organic products in total sales and in a key subcategory such as dairy.**

Aldi has not yet set a target to increase the share of organic products in total sales. Aldi also has no target for growth in organic share within a subcategory. An obtainable subcategory is fruits and vegetables (AGF). Additionally, achieving significant progress in organic products requires a target for growth in the dairy category.

Dirk



→ **Report total emissions annually, including scope 1, 2, and 3.**

Reporting on scope 3 emissions is essential. By reporting total emissions for the baseline year and annually thereafter, Dirk can set concrete targets and implement measures to reduce emissions.

→ **Work toward soy and palm oil that is 100 percent physically deforestation- and conversion-free.**

Provide insight into certificate usage, with a focus on moving toward soy and palm oil covered by identity preserved certificates. These certificates ensure that the origin and

environmental benefits of the produced soy are individually and consistently tracked throughout the entire supply chain.

→ **Disclose the share of sales covered by (top) certifications.**

After data collection, Dirk published an overview of the cultivation, origin, and transport methods of fruits and vegetables (AGF). Supplement this overview with data on the (top) certifications in sales for categories such as fresh produce (potatoes, vegetables and fruit) and animal products like meat and dairy.

Jumbo



→ **Establish a climate roadmap.**

A roadmap should specify which measures Jumbo expects to take to achieve its climate targets in line with the Paris Agreement. It should be particularly clear how Jumbo plans to meet its short-term targets (for 2030).

→ **Take greater responsibility for sustainable agriculture.**

Focus on converting certain product categories to fully organic or covered by other top certifications. This can include essential categories such as dairy, where substantial gains are possible.

→ **Set new targets for reducing packaging materials.**

Ensure that baseline-year reporting is available and report annually on progress.

Lidl



→ **Strengthen the target to halve emissions by 2030, in line with Paris.**

Short-term targets are crucial for reducing emissions in the near future. The next step is to set ambitious targets aligned with the Paris Agreement. It is important to establish goals for at least a 50 percent reduction in emissions by 2030 compared to 2019.

→ **Collaborate with other supermarkets to achieve the plant-based protein target.**

Achieving the goal of 60 percent plant-based protein requires rigorous measures. Many far-reaching actions, such as stopping meat promotions, are only effective if supermarkets act collectively. As a frontrunner in

sustainability, Lidl can take the lead by coordinating measures with other supermarkets or by asking the government to enforce regulation.

→ **Set a target for increasing the share of organic products in total sales and in key subcategories such as dairy.**

Lidl already has a target to grow the share of organic products in total sales and in potatoes, vegetables, and fruit. However, Lidl does not yet have a public target for increasing the share of organic dairy, a category where substantial gains can be made for Dutch agricultural land use.

Plus



→ **Set a short-term target to halve total emissions, including Scope 3, in line with Paris.**

It is a positive step that Plus reports on Scope 3 emissions. The next important step is to establish a short-term target for total emissions, including Scope 3, aligned with the Paris Agreement.

→ **Collaborate with other supermarkets to achieve the plant-based protein target.**

Achieving the goal of 60 percent plant-based protein requires rigorous measures across all supermarkets. Many far-reaching actions, such as stopping meat promotions, are only effective if supermarkets act collectively.

→ **Work toward soy and palm oil that is 100 percent physically deforestation- and conversion-free.**

Provide transparency on the use of certifications, emphasizing the importance of transitioning to soy and palm oil covered by identity preserved certificates. This ensures that the origin and environmental benefits of the produced soy are individually tracked and maintained throughout the entire supply chain.

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Colophon

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