Superlist Green 2023

Which supermarkets make sustainable food the easy choice?

Netherlands, 2nd Edition

SUPER LIST

Introduction

Supermarkets play a crucial role in daily life and are an indispensable part of modern society. Around 70 per cent of the food that the Dutch consume daily, they buy in supermarkets. Supermarkets also have a major influence on how their suppliers produce and what their customers buy. This gives them the opportunity to demand more sustainable farming methods from suppliers and to encourage sustainable diets among their customers. This combined strength as well as its concentration in a handful of companies per country, often supranational, makes supermarkets an exceptional leverage in the food system.

What is Superlist?
Superlist is an international ongoing research project that reveals how supermarkets help their customers eat healthy, sustainable and fair food. The supermarkets included in this edition are Albert Heijn, Aldi, Dirk, Ekoplaza, Jumbo, Lidl and Plus. This selection was chosen because it represents over 80 per cent of the Dutch market. Ekoplaza was added because of its explicit claim on sustainability.

About Superlist Green
This Superlist is a follow-up to the first edition of Superlist Green Netherlands, which came out in 2021. Now, two years later, Questionmark investigates the Dutch supermarkets on what has changed on sustainability in this Superlist Green 2023. Superlist Green 2023 distinguishes four themes: climate plan, protein transition, sustainable agriculture, and sustainable packaging. The methodology with the comparative criteria for this research was published on 14th April 2023, after consultation with supermarkets, the Scientific Council and civil society partners, including: Milieudefensie, Mighty Earth and Natuur & Milieu. The data were collected by Questionmark between 10th April 2023 and 10th June 2023.

The underlying data on which the rankings are based can be viewed here.

Superlist Green allows supermarkets to compare their commitment to sustainability with their competitors and learn of best practices. In addition, Superlist provides concrete recommendations for improvement for each supermarket. In this way, supermarkets can contribute to a more sustainable food system and increase 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.
Not all the measures we come across are extensive enough to count in the ranking, but even the small steps in the right direction are worth noting. We mark those initiatives with the icon **good step**.
The new format of the Superlist Green report is a lot more concise than two years ago. For completeness, there is a background report with the underlying data.

this counts

good step

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SUMMARY

Supermarkets prepare for sustainability, concrete measures still limited

Supermarkets are preparing to play a greater role in making the food system more sustainable. They are doing so by measuring their current performance and setting ambitious targets for the future. Concrete measures in product range, promotion and shop layout are still pending. On the one hand, supermarkets are not yet using much of their influence to make agriculture more sustainable or, on the other hand, make Dutch diets more sustainable. In the 2023 ranking, Ekoplaza, Lidl and Albert Heijn lead the way. Plus lags most.

Ranking Superlist Green 2023

Which Dutch supermarkets make the sustainable food the easy choice?

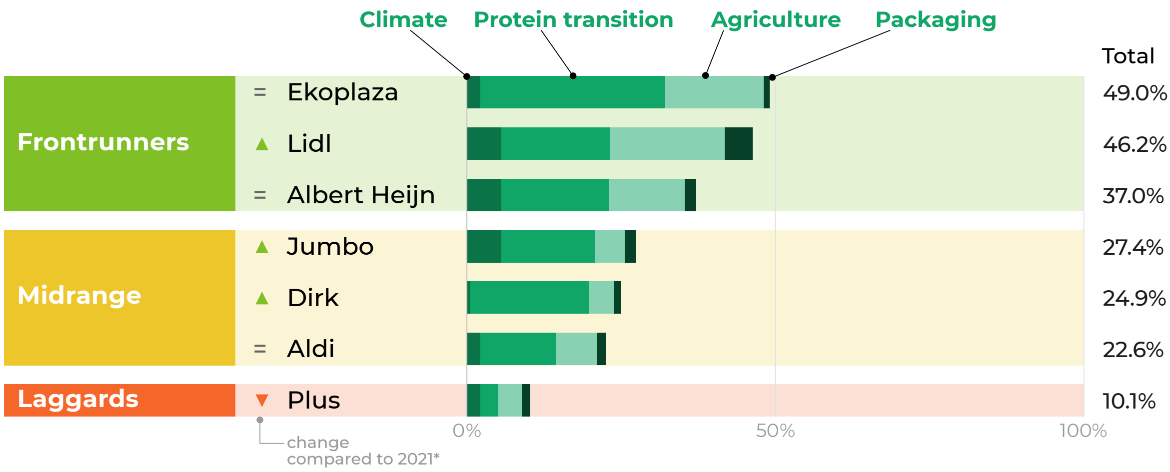


Figure 1 Ranking of supermarkets in Superlist Green 2023, showing total score and supermarkets' performances on individual topics.

*concerns a shift between groups frontrunners, midrange and laggards.

SUMMARY

Transparency as a beginning
For the first time, all supermarkets except Plus report on the ratio of animal to plant-based proteins in food sales. This is a big improvement on the previous edition of Superlist Green, and a direct result of the ongoing demand for transparency by Questionmark in collaboration with Green Protein Alliance, Natuur & Milieu en ProVeg. Albert Heijn, Jumbo and Lidl also report on CO_2 emissions throughout their production chain (scope 3).
This year, Albert Heijn and Lidl are also providing insight into the origin, transport and cultivation methods of products sold. Openness about this is a crucial step for supermarkets to take more responsibility in making the food system more sustainable.

Concrete measures still limited
However, concrete measures to initiate such sustainability are still limited. The majority (more than 80 per cent) of protein-rich products in advertising leaflets are still meat, fish or cheese. Of ready-to-eat meals, 85 per cent contain meat, fish or cheese. An unchanged high proportion (more than 40 per cent) even contains red meat, the food category with the highest ecological footprint. However, supermarkets are taking the first initiatives to reduce the standard option of meat in the diet, led by Ekoplaza.
Supermarkets are currently hardly taking responsibility to make agriculture more sustainable. Generally, supermarkets place that responsibility entirely on their customers; in some product categories, customers do not even have the option to choose for a sustainable product. Aldi and Lidl do, however, invest in projects that try to repair the damage caused by deforestation as a result of palm oil cultivation in the past.

Objectives without concrete action plans implausible
Supermarkets recognise their role in meeting the European climate target of net-zero by 2050. None of them have a developed climate plan to achieve this. They also pledge to stop deforestation in the production of their soy and palm oil, but lack of actions makes this unrealistic. The same goes for the 2019 agreements to reduce packaging use; progress on this cannot be monitored.

About Superlist Green
Superlist Green is an initiative of think tank Questionmark. This second edition was produced in collaboration with Milieudefensie, Mighty Earth and Natuur & Milieu. In this edition, we look at the steps supermarkets have taken in terms of sustainability since the first edition in 2021.

Preface

Thanks to the experienced and passionate researchers at Questionmark, the cooperation of our Scientific Council and the supermarkets, this second Superlist Green research went smoothly. I trust that the insights and recommendations will again be of great value to supermarket directors, politicians and government policymakers.
This research shows that supermarkets are becoming increasingly ambitious and transparent about the sustainability of their operations, but also that this is largely limited to figures and promises on paper. In the product ranges, advertising leaflets and shop layout, we hardly see this policy having any effect yet, let alone in the climate and nature. I thank our civil society partners Milieudefensie, Mighty Earth and Natuur & Milieu, who now have the role of making agreements with supermarkets, based on the facts from Superlist Green, for improvement.

Charlotte Linnebank
General Director Questionmark

Supermarkets determine what Dutch people eat and how that food is produced. In doing so, they make huge profits, often at the expense of the climate and nature. That is why it is good that Questionmark compares supermarkets and shows how they score on sustainability. Unfortunately, it turns out that supermarkets say they are complying with the Paris Climate Agreement, but do not do so in practice. Reducing CO2 emissions is not a non-binding option. The judge was very clear in the lawsuit against Shell: the CO2 needs to go down. Time to take action, supermarkets!

Donald Pols,
General Director Milieudefensie

Supermarkets are among those who can help farmers produce more sustainably. They can do this by paying farmers a good, fair price and encouraging the sale of products with a better performance on climate and nature to consumers. It is good to see supermarkets being more open about what they sell and setting targets for sustainability. However, Superlist Green also shows that supermarkets' actual behaviour is not yet in line with their targets. Therefore, we challenge supermarkets to significantly increase sales of sustainable, local products. This can be done by focusing supply and advertisements less on meat and more on plant-based protein, and more on sustainability-labelled products and seasonal fruit and vegetables.

Rob van Tilburg,
Director Programmes Nature & Environment

Back in 1981, Milieudefensie and Solidaridad published the booklet 'Soy Sonee Soy - Production on a Large Scale' about the risks of deforestation and human rights violations caused by the production of soy for animal feed. More than 40 years later, the problem has unfortunately still not been solved. This research even shows that Dutch supermarkets still do not have a concrete action plan to combat soy deforestation in their chain. This is embarrassing. We will confront supermarkets with this and ensure they come into action. The time for fine promises is over, it is now time for action.

Jurjen de Waal,
General Director Mighty Earth NL

Comparison 2021 - 2023

This overview includes the most notable changes on all indicators in 2023 compared to the first Superlist Green research in 2021.

Subject	Research area	Unchanged since 2021	Improved since 2021
CLIMATE PLAN		New indicator: no comparison possible (p. 10).	
PROTEIN TRANSITION	**Reporting**		All supermarkets, except Plus, report animal/plant-based protein sales ratio for the first time and publish a target to reduce animal share (p. 14).
	Product range	Similar to two years ago, the vast majority (85 per cent) of ready-to-eat contains meat, fish or cheese (p. 14). In none of the supermarkets, consumers have the option of a meal without meat, fish or cheese in all meal categories (p. 15). Still more than 40 per cent of meals contain red meat (p. 14). Small portions of meat are still limited in supermarket product ranges: 39 per cent of meat products have a portion size larger than 100 grams (p. 18).	All supermarkets offer the option of a meal without red meat in all ready-to-eat meal categories (p. 15).
	Advertising leaflet	The majority of protein-rich products in advertising leaflets still consist of animal products: over 80 per cent of all protein-rich products on offer contain meat, fish or cheese (p. 15).	
	Shop layout	Apart from occasional initiatives to encourage plant-based eating, most supermarkets maintain the standard of meat in the Dutch diet (p. 18).	Particularly Ekoplaza takes structural measures to encourage the transition to a more plant-based diet (p. 18).

Subject	Research area	Unchanged since 2021	Improved since 2021
SUSTAINABLE AGRICULTURE	**Reporting**	The majority of supermarkets are still not transparent about the proportion of quality labels and the origin, cultivation and transport method in sales (p. 20).	Lidl has joined Albert Heijn this year in providing full disclosure on the quality labels, origin, cultivation and transport method of its sales (p. 20).
	Product range	The responsibility of choosing for sustainable agriculture is placed entirely upon the customer at almost all supermarkets (p. 22). In several supermarkets, it is not even possible for customers to make a responsible choice in certain product categories (p. 22).	
	Policy deforestation soy	No supermarket has a fully-fledged action plan to tackle deforestation in its supply chains (p. 23).	Unlike two years ago all supermarkets have a target on deforestation-free soy (p. 23)[1]. Since this edition of Superlist, Albert Heijn, Aldi and Jumbo apply a cut-off date (p. 23).
	Policy deforestation palm oil	In general, supermarkets are not yet making a sufficiently active contribution to solve problems in palm oil cultivation (p. 25).	Ekoplaza has implemented a policy on palm oil since this year (p. 25). Aldi and Lidl invest in projects that seek to repair the damage caused by deforestation through palm oil cultivation in the past (p. 25).
SUSTAINABLE PACKAGING	**Reporting**	None of the supermarkets correctly report following the agreements of the Sectoral Plan and the Plastic Pact (p. 28).	Almost all supermarkets report on the target to reduce packaging materials and on the target to certify paper/cardboard (p. 28). Lidl is the only one to report progress on three of the Plastic Pact's main targets (p. 29).

1 except for Ekoplaza. At Ekoplaza, all products comply with European organic legislation, where the probability that deforestation takes place is considerably lower for organic animal feed.

CLIMATE PLAN

Climate targets unachievable without an action plan

MOST NOTABLE FINDINGS

- Supermarkets recognise their role in meeting the climate target net-zero by 2050.
- Albert Heijn, Jumbo and Lidl report on their emissions in the supply chain (scope 3).
- None of the supermarkets has an elaborate climate plan to achieve the climate target net-zero.

To what extent are supermarkets' climate plans sufficient?

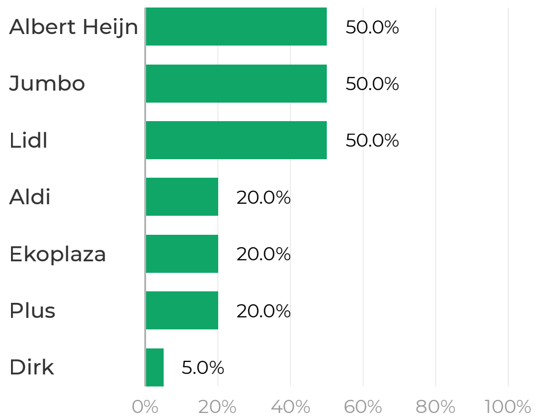


Figure 2 Supermarkets' efforts on climate plans

Adequate plans are missing to achieve climate targets (EN-4.1.1)

All supermarkets recognise their role in achieving the climate target net-zero by 2050.

Ekoplaza and **Plus** report on their scope 1 and 2 emissions, but do not report on scope 3 emissions yet. Both supermarkets plan to map scope 3 emissions in the future. **Aldi** does report on scope 1, 2 and 3 emissions in 2020, but only on scope 1 and 2 emissions over the past 24 months. Data on scope 3 from the past two years is missing. **Albert Heijn, Jumbo** and **Lidl** report on their total recent emissions and the distribution in scope 1, 2 and 3.

Of all the supermarkets, **Albert Heijn** provides the most insight into their measures and interim climate targets. For example, Albert Heijn is the only one to set an interim target to reduce scope 3 emissions: Albert Heijn aims to reduce its greenhouse gas emissions in the supply chain by 45 per cent by 2030.

Albert Heijn, Aldi and **Lidl** set requirements for their suppliers. By 2022, Albert Heijn's biggest own-brand suppliers will have mapped out their entire CO_2 emissions, including reduction plans and targets. Albert Heijn demands all its suppliers (own-brand and A-brand) to report their emissions annually from June 2023 at the latest and to commit to the Science Based Targets Initiative (SBTi) climate targets[2]. Aldi has asked 75 per cent of its suppliers to set their own climate targets by 2024, also in line with SBTi. Lidl requires its suppliers responsible for 75 per cent of emissions to set Science Based Targets by 2026.

Climate target net-zero

The climate target net-zero is a target set by EU member states. The target for 2050 is that greenhouse gas emissions do not exceed what is absorbed (e.g., by trees) and thus net emissions equal zero (Rijksoverheid n.d.). The climate target net-zero is the EU's contribution to the Paris Climate Agreement. The Paris Agreement states, among other things, that the average global temperature increase should remain below 2°C and sets the target of further limiting warming to 1.5°C.

Scope 1, 2 and 3

Industries and businesses, including supermarkets, are major contributors to greenhouse gas emissions. Greenhouse gas emissions contribute to global warming. These emissions take place in scope 1, 2 and 3. **Scope 1** includes a company's direct emissions (e.g., coolants) and **scope 2** the indirect emissions from the generation of purchased energy (e.g., electricity consumption, generation of electricity that does not belong to the supermarket itself).

Of all emissions, more than 90 per cent take place in *scope 3*. **Scope 3** comprises the indirect emissions of CO2 in the company's value chain, both upstream (e.g., transport of raw materials) and downstream (e.g., consumption of meat).

2 SBTi is an initiative that shows companies how much and how fast they need to reduce emissions to avoid negative impacts of climate change.

However, none of the supermarkets have developed an action plan yet to meet the climate target. A developed climate plan should include, among other things: targets on animal and plant-based products, as supermarkets are issuing for the first time this year using Eiweet (see Transparency on meat and dairy sales); and targets on the rest of the product range, as cited in the chapter Sustainable is not the easy choice; requirements to suppliers on sustainable production. We see some supermarkets are already taking some of these measures. Albert Heijn, Aldi and Lidl, for instance, already impose requirements on their suppliers. However, a detailed climate plan must also show how these targets combined will lead to achieving the net-zero climate target in 2050. At the moment, this is not yet clear from any supermarket's climate plan.

None of the supermarkets have a complete climate plan

Figure 3

		Albert Heijn	Aldi	Dirk	Ekoplaza	Jumbo	Lidl	Plus
Reporting on current emissions	Scope 1 and 2	●	●		●	●	●	●
	Scope 3	●	*			●	●	
Intermediate targets for emissions	Scope 1 and 2	-50% in 2030 (already achieved)	-55% in 2030		-20% in 2025		-52% in 2030	-50% in 2030
	Scope 3	-45% in 2030						

*The scope 3 figures for Aldi have not been updated since 2020 and are therefore not included for the ranking in this research.

PROTEIN TRANSITION

Supermarkets transparent about meat sales for the first time

MOST NOTABLE FINDINGS

- All supermarkets, except Plus, report the animal to plant-based protein ratio in their sales figures, and set targets to reduce the animal proportion.
- The proportion of red meat in ready-to-eat meals has not decreased since 2021 and exceeds 40 per cent.
- As in 2021, four out of five protein-rich products on offer are still on meat, fish or cheese.
- Almost 40 per cent of all meat portions exceed 100 grams.

To what extent do supermarkets contribute to the protein transition?

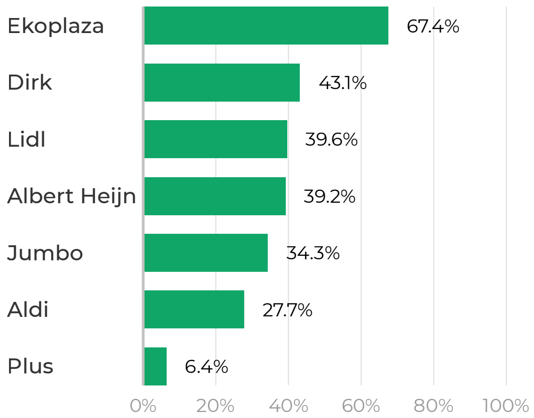


Figure 4 Supermarkets' efforts on the protein transition

The protein transition is necessary to shift the animal to plant-based protein consumption ratio to a more sustainable balance for people and the environment. Supermarkets have a big responsibility to reduce the standard of meat and other animal-based products in the Dutch diet.

Openness on sales of meat and dairy (EN-1.1.1)

The ratio of animal protein to plant-based protein in our diet is currently around 60/40. Shifting this ratio to a more plant-based diet is an important part of the National Climate Agreement (Klimaatberaad 2019). The Ministry of Agriculture, Nature and Food Quality (LNV) sets the target of a diet in which the ratio of animal and plant-based proteins is 50/50 in 2030 (MinLNV 2022a).

Food suppliers such as supermarkets play an important role in this shift, with the first step to change being monitoring protein ratios, in addition to setting concrete targets.

Supermarkets on the way to their protein transition targets

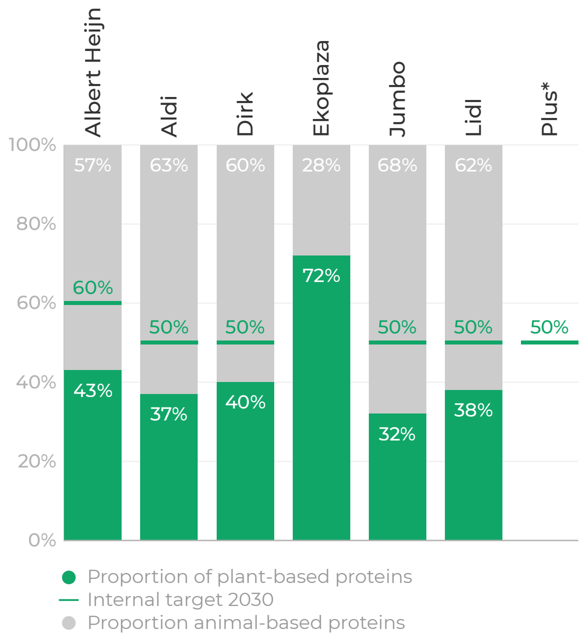


Figure 5 The current proportion of plant-based proteins (calculated according to Eiweet) in supermarket sales in 2022, and the internal target for the proportion of plant-based proteins in 2030.

*Plus has committed to the 50 / 50 target by 2030, but is currently the only one not to report on the current ratio in its product range.

For this reason, Questionmark has collaborated, with Green Protein Alliance (GPA), Natuur & Milieu and ProVeg, on establishing a harmonised workable measuring method to monitor the amount and ratio of plant-based and animal protein in their sales (GPA, 2023).

When Superlist Green first came out in 2021, Albert Heijn, Aldi, Ekoplaza and Lidl recognised their role in the protein transition, but concrete targets and/or reporting were missing. Eiweet changed this. Two years later, we see that **Albert Heijn, Aldi, Dirk, Ekoplaza, Jumbo** and **Lidl** communicate the share of animal versus plant-based proteins in their total sales according to the Eiweet method. See figure 5 for the share of plant-based proteins in supermarket sales in 2022[3]. The figure also shows the supermarkets' targeted share of plant-based proteins in sales in 2030.

Supermarkets' reporting shows the highest share of plant-based protein sale is by far at Ekoplaza, namely 72 per cent[4] (see figure 5). The figure above also shows that supermarkets set a target to reduce the share of animal protein in sales. Whereas Aldi, Dirk, Jumbo, Lidl and Plus aim for a 50/50 animal/plant-based ratio in 2030, Albert Heijn is more ambitious and sets the target to achieve a 40/60 ratio in 2030.

Meat, fish or cheese still most prevalent in ready-to-eat meals (EN-1.2.1)

In practice, it still proves difficult to avoid animal proteins. The vast majority, more than 90 per cent, of the ready-to-eat meals in supermarkets contain animal ingredients (meat, fish, cheese, dairy or eggs). Particularly at Aldi and Dirk, it is difficult to avoid meals with animal proteins and choose a fully plant-based meal instead.

Of ready-to-eat meals, 85 per cent contain meat, fish or cheese. Moreover, meals with red meat (pig or beef) are abundant; over 42 per cent of ready-to-eat meals contain red meat. In 2021, this was 44 per cent.

3 For plant-based products, only protein-rich products were taken into account; for example pulses, meat substitutes and nuts. For the complete list, see the Eiweet method.

4 *Ekoplaza has not set targets on the ratio of proteins in sales, but rather on the ratio of proteins in the consumption pattern of the average Ekoplaza customer. This ratio, according to Ekoplaza's own research, is currently 46 per cent plant-based, 54 per cent animal. Ekoplaza sets the target of bringing the ratio in consumption to 50 / 50 by 2030.

Ekoplaza, like two years ago, continues to lead the way when it comes to the environmental impact of ready-to-eat meals. More than 42 per cent of all meals researched at Ekoplaza have a low environmental impact because they are fully plant-based (23 per cent) or vegetarian (19 per cent).

Figure 7 shows that at **Albert Heijn, Ekoplaza, Jumbo, Lidl** and **Plus,** a variant without animal proteins exists for the majority of ready-to-eat meals. Ekoplaza is the only supermarket to offer at least one fully plant-based quiche. Compared to two years ago, consumers now have the option for a meal without red meat in all meal categories at every supermarket, including Lidl. However, in none of the supermarkets consumers have an option for a meal without meat, fish or cheese in all meal categories.

Advertising leaflets mostly encourage meat, fish and cheese

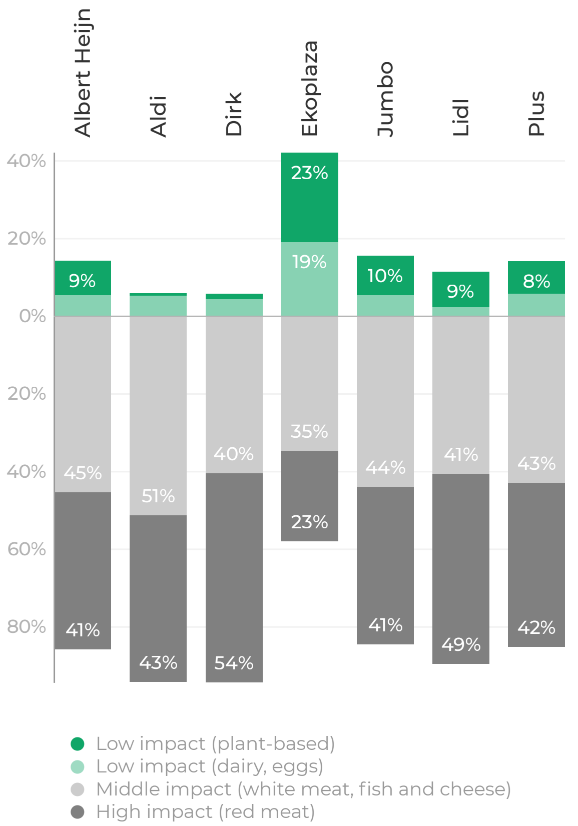
(EN-1.3.1)
We examined all protein-rich products in advertising leaflets and classified the products according to their ecological footprint, from high (red meat) to low (no meat or cheese)[5] .

As figure 8 shows, for all supermarkets, more than 80 per cent of protein-rich products in advertising leaflets consist of animal proteins with a high or medium ecological footprint, namely meat, fish or cheese. Red meat (from beef and pork, among others) has the largest ecological footprint of all animal proteins. Of all protein-rich products on offer, 34 per cent is for red meat. In 2021, this was more than 40 per cent. Only 19 per cent of protein-rich products on offer do not contain meat, fish and cheese.

Ekoplaza has the most environmentally friendly protein-rich offers: just under half of Ekoplaza's offers consist of low environmental impact products and 10 per cent of the products contain red meat. In contrast, at Aldi and Plus, more than 40 per cent of the protein-rich products on offer consist of red meat.

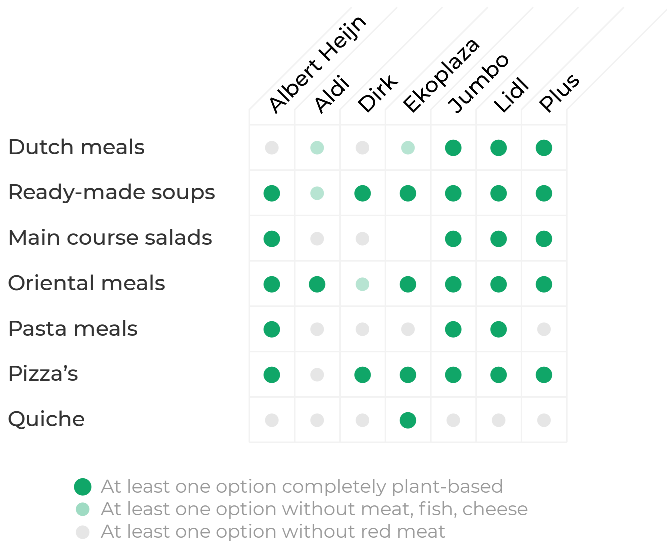
Ready-to-eat meals mostly contain meat and/or cheese

Figure 6



Plant-based option not yet available everywhere

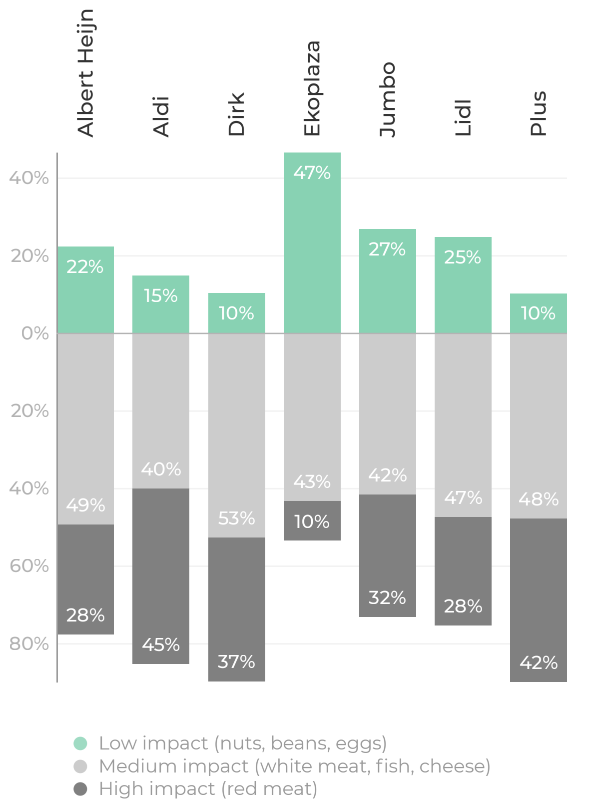
Figure 7



5 For Superlist Green 2025, this indicator will follow the classification of Eiweet (plant core/non-core, animal-plant combi, animal core). The final version of Eiweet arrived too late to do so already in this edition of Superlist Green.

Advertising leaflets often encourage animal proteins

Figure 8



Significant reduction in the proportion of offers on red meat at Jumbo and Lidl

	Share of offers on red meat, 2023 versus 2021	Total protein-rich offers 2023
Albert Heijn	-5.31%	183
Aldi	-2.76%	148
Dirk	-5.90%	230
Ekoplaza	2.01%	58
Jumbo	-8.46%	130
Lidl	-8.80%	222
Plus	-4.40%	214

Figure 9 Changes in the share of protein-rich products on offer with a high and low environmental impact per supermarket since 2021.

good step

Especially at **Jumbo** and **Lidl,** we see a significant decrease in the percentage of red meat offers compared to 2021 (see figure 9). In contrast, Ekoplaza has slightly more red meat on offer than in 2021. Because Ekoplaza has a small advertising leaflet and offers little red meat, the increase is not significant: of all supermarkets, Ekoplaza clearly steers least towards (red) meat via offers and most towards proteins with low environmental impact.

High use of multi-buys by Albert Heijn and Jumbo encourages overconsumption of proteins (EN-1.3.1)

In the advertising leaflets, we examined all protein-rich products by the type of offer. Here, we distinguished between (1) multi-buys[6] and (2) other promotions, including (a) single price promotion (where the discount applies to the purchase of a single product, such as 10% off and from €2.49 for €1.99) and (b) other promotion, e.g., products shown in the leaflet at the regular retail price. The customer does not get a discount on these products, but the products are promoted by the supermarket placing them in the leaflet.

Supermarkets make different use of multi-buys on protein-rich products. Albert Heijn and Jumbo lead with the most multi-buys, over 43 and over 56 per cent respectively. Aldi, Ekoplaza, Lidl and Plus offer fewer protein-rich products via multi-buy, less than 20 per cent.

this counts

Dirk is the only supermarket that has banned multi-buys and has set this out in policy. Dirk's leaflets do include some products with temporary greater volume, which are also included here as multi-buys.

For offers on animal proteins (red meat, white meat, fish, cheese) with medium to high environmental impact, Albert Heijn uses multi-buys on about 48 per cent of its offers, and Jumbo on about 52 per cent of these offers.

6 Packings with temporary extra content (e.g. +15% content) promoted at a certain price are included herein as multi-buy discounts.

Multi-buys

Supermarkets often give discounts on products in advertising leaflets as a price promotion, where the discount is valid upon the purchase of a single product or only on the purchase of more than one product. The latter is called *multi-buy.*
Scientific research shows that multi-buys cause people to eat more of a product type (PHE 2020). Multi-buys thus encourage excessive consumption.
In addition to the indicator from the previous edition of Superlist Green in 2021, the extent to which supermarkets apply multi-buys to all protein sources is included.

Examples of meat offers in leaflets during the research period.

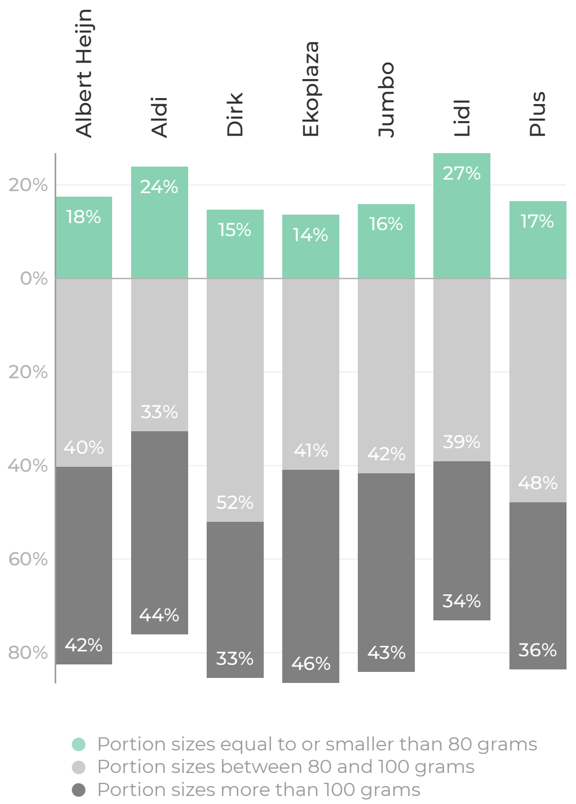
Examples of products at Dirk with temporary extra content, also included here as multi-buy discounts.

Large portions of meat encourage consumption of too much meat (EN-1.3.2)
As in 2021, over four out of five meat products researched are still sold in portions larger than 80 grams: over 82 per cent of all researched meat products have a portion size larger than 80 grams. Over 39 per cent of all portions of meat are larger than 100 grams.

The results show minimal differences: compared to other supermarkets, Lidl and Aldi have a slightly higher proportion of meat products weighing less than 80g.

Small portions of meat in the minority

Figure 10



First measures to break animal food routines signalled (EN-1.3.3)
Whereas supermarkets did not yet take ambitious, measurable measures to encourage the transition to a plant-based diet in 2021, some have done so 2023. **Ekoplaza** is taking the lead in this. Ekoplaza states 75 per cent of the recipes in its 'Lekker Weten' magazine are vegetarian. Ekoplaza also has a policy to commit to limiting meat offers: less than 10 per cent of its offers consist of red meat.
Dirk does not advertise meat on the front and back of its advertising leaflet, and committed to increasing plant-based sales in collaboration with Greendish. **Lidl,** places meat substitutes directly next to alternative meat products on the shelf during a pilot in cooperation with Wageningen University and the World Resource Institute. Besides this, **Lidl** expects to make all its recipes on fresh food packages vegetarian by the end of 2023. Finally, **Albert Heijn** gives a recommendation on how to make the meal vegetarian on every fresh food package.
Aldi, Jumbo and Plus do not currently have ambitious measures as part of their policy.

this counts

this counts

good step

this counts

SUSTAINABLE AGRICULTURE

Supermarkets take little responsibility for sustainable agriculture

MOST NOTABLE FINDINGS

- Supermarkets take little responsibility for making agriculture more sustainable; they usually pass it entirely on their customers.
- Albert Heijn and Lidl disclose certifications, origin, cultivation and transport methods. For the first time, it is possible to compare supermarkets to each other and over time.
- Albert Heijn sells substantially more organic food than Lidl. Fruit and vegetables are more often 'out of season' at Albert Heijn compared to Lidl.

What do supermarkets do to encourage sustainable agriculture?

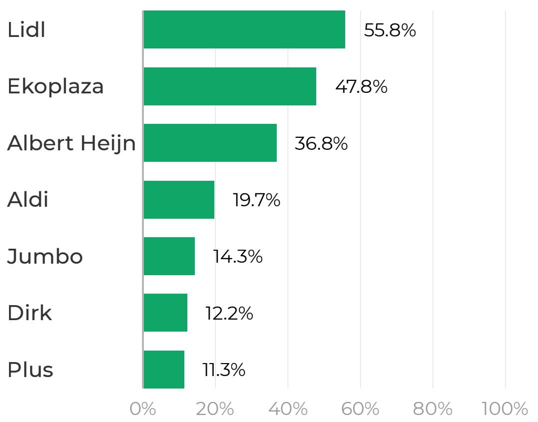


Figure 11 Supermarkets' efforts on sustainable agriculture

Supermarkets usually demand high purchasing requirements from their suppliers. To tackle making the (Dutch) agriculture more sustainable, supermarkets can also play a crucial role by demanding suppliers to engage in sustainable agriculture, and paying them accordingly.

dit telt

Albert Heijn and Lidl transparent about origin, cultivation, and transport method (EN-2.1.1)

In 2021, **Albert Heijn** was still the only supermarket to disclose the origin, cultivation method and transport of products sold, as well as the coverage of sales with certification. This year, **Lidl** has joined in being transparent on this. The other supermarkets only selectively disclose part of their sales. The table below lists the topics on which supermarkets disclose.

good step

For figure 12, the following should be noted. At **Plus,** all daily fresh milk, buttermilk and yoghurt is always organic. Although this probably accounts for a large proportion of the dairy sold, the share of sales is unknown. This fact could therefore not be counted in the ranking. That does not alter the fact that Plus is setting an important example for other supermarkets by doing this. Plus takes responsibility for making dairy farming more sustainable, where many other supermarkets still pass that

Supermarkets' transparency

		Albert Heijn	Aldi	Dirk	Ekoplaza**	Jumbo	Lidl	Plus
Share of top certification in sales	fresh vegetables	●	○	○	●	○	●	○
	fresh fruit	●	○	○	●	○	●	○
	vegetables, preserves	●	○	○	●	○	●	○
	fruit, preserves	●	○	○	●	○	●	○
	eggs	●	○	○	●	○	●	○
	dairy	●	●	●	●	○	●	*
	meat	●	○	○	●	○	●	○
	fish	●	○	○	●	●	●	○
Cultivation method	fresh vegetables	●	○	○	○	○	●	○
	fresh fruit	●	○	○	○	○	●	○
	vegetables, preserves	○	○	○	○	○	○	○
	fruit, preserves	○	○	○	○	○	○	○
Origin	fresh vegetables	●	○	○	○	○	●	○
	fresh fruit	●	○	○	○	○	●	○
Transport	fresh vegetables	●	○	○	○	○	●	○
	fresh fruit	●	○	○	○	○	●	○

● Transparent
○ Not transparent

Figure 12 Supermarkets' transparency about the share of top certifications, origin and cultivation and transport methods of products sold.

* At Plus, all daily fresh milk, buttermilk and yoghurt is always organic. Since it is unknown what proportion this is of the total (sold) dairy, this is not reflected in the table and scores.
** share of organic in product range; sales figures unknown

good step

responsibility to customers. **Dirk** has also taken a first step by purchasing all home brand liquid dairy with the Planet Proof certification.

Differences in contribution to sustainable agriculture
Lidl's new transparency this year - following Albert Heijn's lead - allows better understanding of supermarkets' individual contribution to major social challenges such as the climate crisis and the nitrogen problem for the first time.

Organic acreage

The European Union has set a target of at least 25 per cent of agricultural area being used organically by 2030. The Netherlands has committed to contribute to this with at least 15 per cent organic area. Moreover, that target is part of the approach to the Dutch nitrogen problem (MinLNV, 2022b).

Albert Heijn sells significantly more organic than Lidl
Figure 13 shows the share of organic food in the sales of the three supermarkets that are transparent about their contribution: **Albert Heijn, Ekoplaza** and **Lidl**.

this counts

It is not surprising that Ekoplaza, as an organic supermarket, far exceeds the other two supermarkets. What does stand out in this table is that Albert Heijn sells significantly more organic across the board than Lidl. Possibly this is due to active promotion of organic at Albert Heijn, for example the fixed discount on organic for 'premium' customers.

Albert Heijn sells considerably more organic products than Lidl

	Albert Heijn	Eko-plaza	Lidl
vegetables	11.5 %	At least 90%**	5 %
fruit	3.6 % *		2 %
vegetables, preserves	4.2 %		4 %
fruit, preserves			1 %
eggs	29.4 %		12 % ***
dairy (excluding cheese)	7.5 %		6 %
cheese	4.5 %		1 %
meat	7.3 % meat 5.0 % deli meats 5.2 % poultry and fish		1 %
fish			1 %

Figure 13 Sales figures on organically certified products at Albert Heijn, Ekoplaza and Lidl in different product categories.

* including fresh juices
** share of organic in product range; sales figures unknown
*** 'Beter Leven' 3-star, in combination with Organic or Planet Proof

Lidl sells more seasonal products than Albert Heijn

		Albert Heijn	Lidl
Herkomst	NL	47 %	47 %
	other EU	26 %	29 %
	Outside EU	**27 %**	**23 %**
	Mix EU and outside EU	0.1 %	1 %
Teelt	Open cultivation	21 %	80 %
	Covered cultivation	**79 %**	**20 %**
	and greenhouse	0.7 %	0 %
	Unknown		
Transport	Road	75 %	76 %
	Water + road	24 %	24 %
	Air + road	**0.5 %**	**<1 %**

Figure 14 Origin, cultivation and transport method of sold fruits and vegetables by Albert Heijn and Lidl.

Lidl sells more seasonal products than Albert Heijn
The table in figure 14 shows where Albert Heijn and Lidl source their fruit and vegetables (other supermarkets do not disclose this).

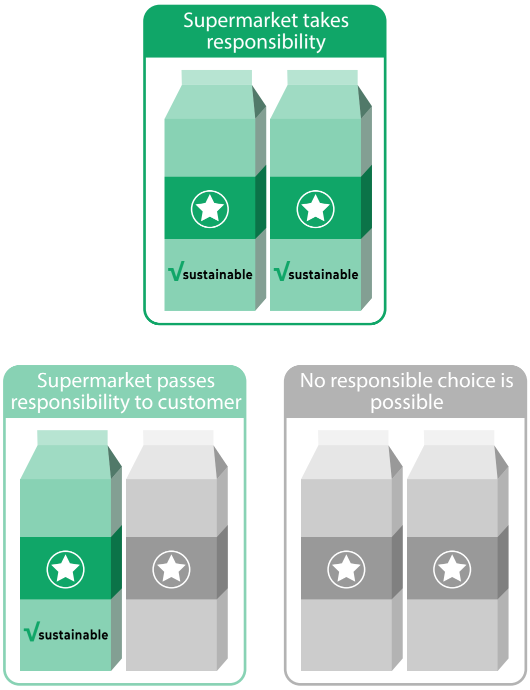
It is noticeable that Albert Heijn sources a large proportion (79 per cent) of its fruit and vegetables from 'covered cultivation'; that can be greenhouse cultivation, but also cultivation under (plastic) tunnels in southern Europe. At Lidl, on the other hand, fruit and vegetables largely come (80 per cent) from 'open cultivation'; that is, 'open ground' fields or orchards. Possibly this difference can be explained by Albert Heijn's wide range of products. Albert Heijn provides a larger variety of products year round, including outside the regular harvest season. This explanation is supported by the difference in the share of fruit and vegetables sourced from outside of Europe (Albert Heijn: 27 per cent; Lidl: 23 per cent).
In 2022, both supermarkets still made use of air transport for a small part of their product range. Air transport greatly contributes to emissions. In 2023, Lidl pledged not to import any fruits or vegetables by aeroplane. Albert Heijn made this commitment for 'unprocessed' fruits and vegetables.

Supermarkets still offer unsustainable products in almost every product category (EN-2.2.1)
With the exception of Ekoplaza, we found variants not covered by a certification or sourcing policy at all supermarkets in almost all product groups researched.
A supermarket can take responsibility for making agriculture more sustainable to a greater or lesser extent (see also figure 15).
Many supermarkets offer their customers a choice of products with or without a certification: responsibility is then passed to the customer. Some supermarkets take responsibility and determine the lower limit of sustainability of certain products with their own purchasing conditions: only certified products are then on the shelves.
The findings show that the responsibility to choose sustainable agriculture still generally lies with the customer. In fact, for most supermarkets, sustainable and therefore responsible choices are not available in several product shelves.

A few changes are visible in supermarkets' responsibility for sustainable agriculture compared to 2021. However, it is important to mention here that these changes are not always related to changes in supermarket policies: the assessment of certifications has been tightened on a number of issues in the interim. [7]

Here, **Ekoplaza** stands out from the other supermarkets with a product range that is at least 90% organic, taking responsibility for sustainable agriculture in most categories. At Aldi, Dirk, Lidl and Plus, in several product categories, customers do not have a choice of variant that offers any guarantee of care for the environment and nature. However, **Aldi** is the only supermarket apart from Ekoplaza to take responsibility for carrots and onions in the product categories researched: at Aldi, all carrot and onion variants are certified with the On the Way to PlanetProof certification. We also see

7 Milieu Centraal assesses certifications in the Keurmerkenwijzer (Certification Guide). This was revised in 2022, as a result of which some certifications are assessed differently on details (Milieu Centraal, no date). For example, the EU Organic label is now no longer a top certification for all product groups, namely no longer on rice, coffee, tea and cocoa, nor on tropical fruit and vegetables. Thus, certain products that were still counted as 'with Top Certification' in 2021 may now no longer be considered so.



improvement at Albert Heijn and Lidl compared to two years ago: for example, **Albert Heijn** now has organic oranges and grapes in its range, and **Lidl** offers rice with the Sustainable Rice Platform certification and broccoli with the On the Way to PlanetProof certification.

this counts

However, the overall picture remains unchanged: supermarkets hardly take responsibility for making Dutch agriculture more sustainable.

No fully-fledged plan of action against deforestation caused by soy (EN-2.3.1)
Despite supermarkets' target to eliminate deforestation in their supply chains by 2025, still none of the supermarkets have an effective action plan to achieve this.

All supermarkets, except for Ekoplaza, are members of the Customer Goods Forum. Whereas in Superlist Green 2021, none of the supermarkets had a target to completely eliminate deforestation for soy, **Albert Heijn, Aldi, Dirk, Jumbo, Lidl** and **Plus** now do (see figure 16). **Albert Heijn, Aldi** and **Jumbo** also apply the *cut-off date* of 1 August 2020: the date after which deforestation will no longer be accepted.

this counts

Dutch supermarkets mostly place responsibility sustainable choice upon customers

Figure 15

* plain
** young and young matured cheese
*** filter coffee and coffeepads

this counts

In addition, **all supermarkets**, except Ekoplaza, are members of Round Table on Responsible Soy (RTRS)[8] and other action-oriented platforms.
Ekoplaza does not have a cut-off date. This is due to European legislation for organic products, which all Ekoplaza's products comply with. Although European organic legislation does not include hard requirements around forest logging, the probability that deforestation takes place is considerably lower for organic animal feed than for non-organic animal feed. For the calculation of the ranking, Ekoplaza is however judged as supermarket without cut-off date.

good step

Interestingly, no supermarket has a fully-fledged action plan to tackle deforestation in its supply chains yet. **Albert Heijn** does have an action plan to eliminate deforestation for his own products. However, within this approach, the possibility to take soy from high-risk suppliers that deforest for soy cultivation still exists. **Aldi** has a policy on deforestation-free chains in which they monitor compliance, but it is not clear what this means specifically for soy.

good step

Target 'net zero deforestation'

Over a decade ago, supermarkets affiliated to the Customer Goods Forum pledged to ban deforestation from their soy and meat supply chains (CGF 2010). The target to 'net zero deforestation' in 2020, where part of the forest loss could be compensated by forest restoration, was not met by the supermarkets. On top of that, Greenpeace International observed that in 2019, none of the big international supermarkets had a policy that could guarantee deforestation-free soy (Greenpeace International 2019).

Supermarkets do not have effective action plans against deforestation

	Albert Heijn	Aldi	Dirk	Ekoplaza	Jumbo	Lidl	Plus
Cut-off date (2020)	Yes	Yes	No	No	Yes	No	No
Target deforestation-free soy (2025)	Yes	Yes	Yes	No	Yes	Yes	Yes
Supplier transparency	Yes	No	No	No	Yes	No	No
Deforestation-free soy in feed	≥80%	<20%	≥80%*	100%	unknown	100%	≥80%*
Member of action-oriented platform	Yes	Yes	Yes	No	Yes**	Yes	Yes
Action plan	No	No	No	No	No	No	No
Purchase-conditions	Yes	No	No	No	No	No	No

Yes / No; 100% / ≥80% / <20% / unknown

Figure 16 The extent to which supermarkets comply with multiple steps against deforestation caused by soy in animal feed.

*Superunie set a target in 2019 for 100 per cent of soy used in animal chains to be RTRS certified by 2020. Reporting for 2022 shows that this target was not met, and furthermore that the share of RTRS certified soy remained at the same percentage as in 2019, i.e., 93 per cent. This is where the reliability factor was applied in the assessment.
**Because the basic score of 2 points for deforestation-free soy in feed is not met, it is not included in the assessment.

8 RTRS is a partnership that focuses on making soy more sustainable.

An action plan should consist of an ambitious deforestation policy based on the Accountability Framework, with, for example, clear requirements for direct and indirect suppliers and a public grievance mechanism. Until an effective action plan is in place, the deforestation-free target are in danger of not being met yet again, just like it failed to be achieved in 2020 due to missing policy.

Aldi and Lidl invest in projects that repair damage caused by deforestation in palm oil cultivation (EN-2.3.2)
In this research, we distinguish between measures the supermarket can take *as a buyer* of raw materials and products, on the one hand, and the *other contribution* supermarkets can make to solving the problems in palm oil cultivation, on the other.[9] For example, companies can join the Palm Oil Innovation Group (POIG)[10]. Supermarkets can also support projects that seek to repair the damage caused by past deforestation.

Sourcing certified palm oil
All researched supermarkets have policies on the sustainability of palm oil in their own brand products. **All supermarkets** make a commitment to use fully Roundtable on Sustainable Palm Oil (RSPO) certified palm oil. In addition to sourcing certified palm oil, supermarkets can ask their suppliers for assurances on palm oil already incorporated in purchased products. They can also ask their suppliers to use only traceable palm oil, to get a grip on any risks. **Lidl** is currently the only one to impose these requirements on its suppliers.

Other contributions to sustainable palm oil
Enabling sustainable cultivation of palm oil in the future will require a systemic change that cannot be enforced by purchasing certified palm oil alone. In the agreements to combat deforestation, companies therefore have a greater responsibility than making their own sourcing more sustainable.

Aldi and Lidl make off-chain investments to repair damage caused by deforestation in palm oil cultivation

		Albert Heijn	Aldi	Dirk	Ekoplaza*	Jumbo	Lidl	Plus
As purchaser	Largely certified palm oil in own brand	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Requirements deforestation-free policies all suppliers	No	No	No	No	No	Yes	No
	Requirements raceable palm oil to all suppliers	No	No	No	No	No	Yes	No
Other contributions	Member of RSPO	Yes	Yes	Yes	No	Yes	Yes	Yes
	Member of another action-oriented platform	Yes	No	No	No	No	Yes	No
	Off-chain investments	No	Yes	No	No	No	Yes	No

Yes
No

Figure 17 The extent to which supermarkets comply with different steps against deforestation caused by palm oil.

*In 2021, Ekoplaza scored no points on this indicator. At that time, Ekoplaza's policy was to avoid palm oil completely. The methodology of the Palm Oil Scorecard does not consider this to be an adequate tool in the fight against deforestation. Ekoplaza has adjusted its policy for where palm oil is necessary in a product, and based on this policy is assessed on this indicator this year.

9 In doing so, we follow the methodology of the World Wildlife Fund's Palm Oil Scorecard, which we use for this indicator.
10 POIG is a partnership that aims to make palm oil cultivation more sustainable by encouraging innovations.

dit telt

dit telt

For example, companies can join an action-oriented platform. **Albert Heijn, Aldi, Dirk, Jumbo, Lidl** and **Plus** are members of RSPO. **Albert Heijn** is also a member of the Palm Oil Transparency Coalition. **Lidl** is a member of Forum for Sustainable Palm Oil (FONAP) and Retailer Palm Oil Group. Supermarkets can also support projects that seek to repair damage caused by deforestation. Just like two years ago, German parent company **Aldi** Nord is committed to this. **Lidl** also supports projects with small-scale farmers in Indonesia through FONAP. Other supermarkets can still make great progress on these issues.

SUSTAINABLE PACKAGING

Reduction packaging impossible to monitor due to missing baseline measurement

MOST NOTABLE FINDINGS

- Supermarkets' commitment in 2019 to reduce packaging was impossible to verify from the start: supermarkets did not know how much they used at the beginning.
- Supermarkets provide more insight into the progress of the Plastic Pact targets.
- Some supermarkets provide numbers on packaging but these cannot be compared between the supermarkets or with the target as stated in the Sustainable Packaging Sectoral Plan.

What do supermarkets do to encourage sustainable packaging?

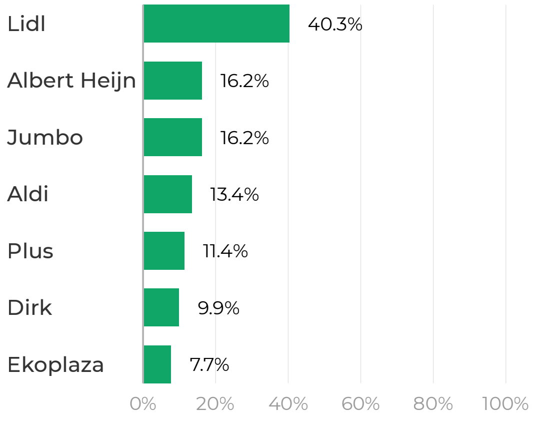


Figure 18 Supermarkets efforts on sustainable packaging

Single use packaging causes large societal problems - not only because of the emissions during production, but also as non-recyclable waste and littering after use. The amount of new, single use plastic packaging needs to be reduced drastically. Supermarkets are an important source of packaging.

Progress on reduction of packaging materials impossible to monitor (EN-3.1.1)
The Sustainable Packaging Sectoral Plan (see text box) was already unattainable when it was drawn up, considering the main targets are not measurable. This is because when it was drawn up, supermarkets had no insight into the amount of packaging material they put on the market in the reference year 2017. Enquiries with supermarkets and umbrella organisation CBL reveal that this information is no longer retrievable either. Without such a baseline measurement, it is impossible to assess whether the targets will be met in 2025.
One positive effect of the sectoral agreement, however, is that supermarkets have since started collecting and reporting the necessary data. **All supermarkets** now also mention the targets in their policies (see table 19). Moreover, **Albert Heijn, Dirk, Jumbo, Lidl** and **Plus** provide insight into the overall reduction in packaging - two years ago, only Albert Heijn did so. However, no supermarket can compare the reduction in packaging with the reference year 2017, as promised in the target.

this counts

Sustainable Packaging Sectoral Plan

In the Sustainable Packaging Sectoral Plan, several parties, including supermarket umbrella organisation CBL, have set concrete targets to reduce packaging use and contribute to keeping packaging materials in cycles (CBL 2019). By 2025, supermarkets contribute 20% less packaging material on the market than in 2017. All supermarkets, except for Ekoplaza, are affiliated to CBL.

Plastic Pact

The Plastic Pact is a public-private initiative aimed at reducing the use of (new) plastic by 20 per cent by 2025, compared to 2017. Supermarkets will also only market single-use packaging that is 100% recyclable by 2025. On average, these packages contain at least 35% recycled plastic, and 70% high-quality recycling takes place (MinIenW 2019).

None of the supermarkets apply the 2017 reference year for sustainable packaging

Figure 19

	General reduction target	General reduction reporting
Albert Heijn	according to sectoral plan	ahead of schedule, 16.25%* reduction 2018-2022
Aldi	according to sectoral plan	no reporting
Dirk	according to sectoral plan	behind schedule, 11%* reduction 2019-2022
Ekoplaza	no target	no reporting
Jumbo	according to sectoral plan	ahead of schedule, 12%* reduction 2020-2022
Lidl	according to sectoral plan	behind schedule, 2%* reduction 2018-2022
Plus	according to sectoral plan	behind schedule, 11%* reduction 2019-2022

*this report only covers the own brand range.

Nor do any of the supermarkets report in the agreed format. To properly assess the reduction in packaging material, the supermarkets have agreed to report in the number of kilograms of packaging per kilogram of product sold.

good step

Jumbo is the only one to report the number of kilograms of packaging material, but per unit of product sold (instead of weight sold). Other supermarkets report on reduction in total weight of packaging material, or are unclear on this. Reporting on reduction in total weight provides insufficient information: decrease in market share can also lead to a reduction in total weight of packaging material.

More understanding of progress on Plastic Pact (EN-3.1.1)

In 2019, the Ministry of Infrastructure and Environment made agreements with a large number of companies in the Netherlands specifically on reducing the use of single-use plastic. Again, CBL signed on behalf of Albert Heijn, Aldi, Dirk, Jumbo, Lidl and Plus. Ekoplaza also signed the Plastic Pact in February 2019.

this counts

Lidl is the only one to report on three of the pact's main targets. **Albert Heijn** and **Jumbo** provide insight into the share of recyclable packaging and the use of recycled plastic. **Aldi** and Superunie, the purchasing organisation of **Dirk** and **Plus**, report only the use of recycled plastic, and **Ekoplaza** only reports the reduction of plastic packaging. All supermarkets mention the targets of the Plastic Pact in their policies and give examples of ways in which they are improving plastic packaging. This does however not always involve reporting on progress.

In 2021, Superunie gave insight into all three main targets. In the current report, they only report on the progress of the targets in the Sectoral Plan.

Recommendations

Superlist Green aims to provide insight into which supermarkets are committed to nature conservation and a healthy environment, and which are still lagging behind in this area. In addition, Superlist Green aims to make Dutch supermarkets aware of their responsibility for nature conservation and a healthy environment, give insight into where they stand and what steps they can take. After extensive analysis of supermarkets' performances, we provide both sector-wide and supermarket-specific recommendations (in Dutch) to help supermarkets contribute to a more sustainable food system.
The recommendations below for improving policies, initiatives, advertising leaflets and product range apply to all supermarkets researched in Superlist Green.

Recommendations for all supermarkets

Climate plan

- **Transparency: Report on emissions in scope 1, 2 AND 3, and set up a concrete action plan, including intermediate targets, that will lead to achieving the net-zero climate target by 2050.**

Protein transition

- **Transparency: Report the ratio of animal/ plant-based proteins in sales annually and take measures to reduce the proportion of animal proteins in sales.**

- **Practice: Offer at least one plant-based meal in each ready-to-eat category and reduce the proportion of meals with red meat.**

- **Practice: Reduce the proportion of red meat offers in the advertising leaflet and avoid multi-buys on meat.**
  Recent scientific research shows that, of all types of promotions, multi-buys ('2 for the price of 1', etc.) lead to additional purchases and excessive consumption the most (PHE 2020).

- **Practice: Reduce portions of meat products and avoid portions that exceed 100 grams.**

Sustainable agriculture

- **Transparency: Report on the certification of vegetables, fruits, eggs, dairy, meat and fish sold and on** the origin, cultivation and transport method of vegetables and fruits sold.
- **Practice: Take responsibility for sustainable agriculture, without passing that responsibility on to customers.**
  Make sure responsible choices are available in every product category, or preferably, avoid variants that are not covered by a certification or procurement policy.

- **Practice: Set up an action plan to address deforestation in supply chains and to eliminate soy deforestation completely by 2025.**
  An action plan should include an ambitious deforestation policy based on the Accountability Framework, including, for example, clear requirements for direct and indirect suppliers and a public grievance mechanism.
- **Practice: Make an active contribution to solving the problems in palm oil cultivation: for example, support projects that try to repair the damage caused by deforestation in the past.**

Sustainable packaging

- **Transparency: Report on progress towards Plastic Pact targets in kilograms of packaging material per kilogram of product sold.**
  Reporting on reduction in total weight does not provide sufficient information.

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Colophon

Initiative and implementation
Think Tank Questionmark

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