## 2021 Meat and Climate Supermarket Ranking

<table>
<thead>
<tr>
<th>Supermarket</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Co-op</td>
<td>45.6%</td>
</tr>
<tr>
<td>Tesco</td>
<td>41.3%</td>
</tr>
<tr>
<td>Waitrose &amp; Partners</td>
<td>38.1%</td>
</tr>
<tr>
<td>Sainsbury’s</td>
<td>37.5%</td>
</tr>
<tr>
<td>M&amp;S</td>
<td>33.1%</td>
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<tr>
<td>Aldi</td>
<td>28.1%</td>
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<tr>
<td>ASDA</td>
<td>23.8%</td>
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<tr>
<td>Morrisons</td>
<td>22.5%</td>
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<tr>
<td>Iceland</td>
<td>21.9%</td>
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<tr>
<td>Lidl</td>
<td>17.5%</td>
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</table>
Feedback’s Meat and Climate supermarket ranking scores the top ten UK retailers on their work to address the climate crisis by reducing the environmental impact of the meat and dairy they sell.

WHY?
People trust retailers to ensure that the products they sell won’t hurt the planet - including the meat and dairy they sell. Meat and dairy production directly contribute to the climate crisis and to deforestation and the loss of natural wonders like the Brazilian rainforest. To meet these challenges the UK must halve its meat and dairy consumption by 50% and ensure that the meat that is eaten is produced in ways that cause less environmental damage. UK supermarkets control over 90% of the UK groceries market share and for many people, going to the supermarket is the only option for buying food. It’s up to supermarkets to address the climate impact of the food they sell and help shoppers transition to eating less meat and dairy.

WHAT?
The ranking scores retailers across a number of indicators, including whether they’re adopting adequate corporate policies and targets on climate and meat, whether they’re offering better meat options not linked to deforestation, and whether they’re prioritising the sales of healthy food like fruit and vegetables. The ranking also looks at how well retailers are translating their corporate climate policies into practice in-store - that is, the actions they are taking, like using clear labelling, offering a range of plant-based foods and better meat options, and using promotions and loyalty card points to support sustainable and healthy choices, such as buying fruit and veg. Read the full scorecard at the end of this report.

WHAT WE FOUND
• Supermarkets must take responsibility for the climate footprint of the foods they sell – including meat. They must start by being transparent on what they sell, their carbon emissions, and how they’re going to tackle them.
• We need a wholesale change in supermarket culture, from the boardroom down. Supermarket executives must have their pay linked to environmental outcomes, including meat reduction and emissions targets, and supermarket buyers must be trained on sustainability principles, including targets set for reducing meat and dairy sales and increased fruit, veg and plant-based protein sales.
• Supermarkets must change the way they sell food, to make sure that this prioritises fresh, healthy fruit and vegetables, which are good for people and the planet. They can do this by getting rid of meaningless labels on meat products, changing store layouts, stopping routine promotions on meat and dairy products, and supporting people to buy healthy food with incentives like loyalty points weighted towards fresh fruit and veg.

Climate and sustainability are high on the agenda this year, and supermarkets are ramping up their climate commitments to shoppers and policy-makers alike. But we need action, not just pledges and policies. Which supermarket will be the first to step forward and take responsibility for reducing how much meat and dairy it sells, for nature and the climate?

WHAT NEXT?
• Supermarkets must change the way they sell food, to make sure that this prioritises fresh, healthy fruit and vegetables, which are good for people and the planet.
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WHAT?
The ranking found that supermarkets across the spectrum, from Iceland to Waitrose, are failing to consistently apply their climate commitments to the way they sell food to customers. While corporate policies have improved since the last time Feedback assessed retailers in 2019, these are not being applied to stores and sales, with a few exceptions.

• Many retailers are still using labels on meat products which are meaningless or which customers may find misleading: the worst examples use made up ‘fake farm’ names, which imply that value meat products are produced under much higher standards than the reality. These labels are in direct contradiction with policies to promote more plant-based foods.

• Price promotions on meat products, particularly of processed meat or ready meals, continue to hinder shoppers’ efforts to eat ‘less and better’ – meanwhile, in some supermarkets, options such as organic, or even free range, continue to be rare.

• At a corporate level, most supermarkets are not yet rigorously measuring or reporting on the climate impact of the food they sell, including meat and dairy, preventing them from taking real responsibility to act on their climate and nature burden. There is very little transparency on how much meat and dairy retailers sell and what the climate impact of this is.

• Retailers still don’t have consistent climate targets covering the emissions and impact of the products they sell; only one retailer, Co-op, has committed to addressing this, and only for ‘own label’ products.

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Industrial meat production fuels high profits and high impacts on both our climate and nature. We can’t solve climate change without taking a good look at what we eat. Global food production is the single biggest impact humans have on our planet – greater than burning fossil fuels or transport. In fact, some of the biggest meat and dairy corporations in the world are also the biggest polluters, with the 5 largest of these globally emitting more greenhouse gases than ExxonMobil, BP or Shell. Meat production also causes environmental damage through the feed animals are fed, especially soya: the UK imports the large majority of its soya from South America, at least 90% of which is fed to animals, particularly chicken and pork – meaning that feed fed to animals in the UK is linked to deforestation and loss of natural ecosystems in places like the Brazilian Cerrado. Overall, agriculture expansion drives three-quarters of deforestation worldwide, with beef, soya and palm oil responsible for 59% of deforestation.

Addressing the environmental impact of what we eat, primarily by reducing the amount of meat and dairy consumed in high-income, industrialised countries (which represent more than their fair share of global meat and dairy consumption), alongside other measures such as halving food waste, could deliver a fifth of emissions mitigation needed globally to stay within the Paris Agreement’s global warming limit of 2°C. The government’s own climate advisory body, the Committee on Climate Change, reports that, of all their recommendations on how we use land and produce food, a 20% reduction in the most carbon intensive foods (i.e. beef, lamb and dairy) has the largest impact on addressing climate change impacts from this sector.

In fact, while some measures to decarbonise our economies require the development of new technologies or major infrastructure investments, reducing meat and dairy consumption does not, leading this change to be described by the Committee on Climate Change as a ‘low-cost, no regrets’ measure. In addition, eating less processed and red meat has been linked to better health outcomes: evidence from Oxford University suggests that to meet the NHS’ ‘Eatwell’ guidelines, the UK needs to reduce consumption of some meats by up to 90%. Feedback carried out the Meat and Climate Supermarket Scorecard to assess how well supermarkets, as the most powerful companies in our food system, are doing their bit to contribute to these goals.
WHAT IS A ‘FOOD ENVIRONMENT’ AND WHY DOES IT MATTER FOR EATING LESS MEAT AND DAIRY?

The food environment is the environment which influences how we choose, shop for, and consume food. It is everything around us, from billboards and TV adverts to the number and type of shops available to shop at, to how food is packaged and labelled. It could even be what is on which shelves in the supermarket, affecting what we’re more likely to reach for while shopping.

Academics describe the ‘food environment’ as ‘the consumer interface with the food system that encompasses the availability, affordability, convenience, promotion and quality, and sustainability of foods and beverages in wild, cultivated, and built spaces that are influenced by the socio-cultural and political environment and ecosystems within which they are embedded’[11]. Food environments make a big impact on what we buy and eat, and the UK food environment is currently creating significant overconsumption of meat and dairy: citizens consume on average around 70 grams of red and processed meat per day, according to the NHS[12] (dietary reference values stipulate 55.5 grams of protein per day for adult men and 45 grams for adult women, though individual requirements will vary)[13]. But there is public appetite for change: 43% of UK adults report making the choice to reduce their consumption of meat ‘fairly often’ or ‘all the time’ when grocery shopping[14].

However, it’s difficult for shoppers to make these changes alone: despite the increase in popularity of plant-based foods, meat consumption is not declining, with the fastest growing grocery products of 2020 including an increase in purchases of chicken, beef and pork products[15]. Supermarkets play a critical role in shaping food environments: after all, almost everyone does at least some of their shopping at the supermarket, and retailers are where customers get many of their messages about where food comes from, how it’s produced and whether it’s healthy or environmentally friendly. This influence is not only limited to the in-store experience but extends into customers’ homes through branding, package sizes, labelling and advertising, all of which contribute to how UK citizens perceive the food they eat.

As such, supermarkets have a big role to play in addressing the climate challenge of meat and dairy. Feedback’s scorecard makes recommendations, including weighting loyalty card points to support fruit and veg purchases instead of meat and dairy, taking extremely environmentally damaging types of meat (such as chicken with links to soya production in South America) off the shelves, and dropping potentially manipulative or misleading labels, such as so-called ‘fake farm’ labels, which give shoppers the impression that cheap meat was produced under much higher environmental standards than the reality. Find out more about what supermarkets can do in our Market Brief[16].
THE RETAILER RUNDOWN AND AWARDS
It’s what they do: Co-op leads the way, winning points for transparency on the carbon footprint of the food they sell and commitment to culture change throughout its business.

**Transparency**
Show us the climate and environment impact of your meat and dairy sales

**Commitment**
Lead by addressing climate change

**Commitment**
Lead by selling less meat

**Commitment**
Lead by sourcing and selling better meat

**Practice What You Preach**
Incorporate climate goals into corporate culture

**Show Us On The Shelves**
Help customers find and buy less and better meat products

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Co-op scored against 40 indicators covering corporate policy and in store practice.

- Tracks and publishes the carbon impact of their products
- Researches and promotes plant-based foods
- Links top executives pay to achieving climate goals
- No transparency or targets on reducing meat and dairy sales
- Very few organic or free-range options available

Co-op 45.6%

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Committed to transparency on how much meat and dairy they sell

Offers more than 25% vegetarian and vegan ready meals

Committed to research to make animal feed more sustainable

Uses unregulated and meaningless labels like ‘Trusted Farms’ and made-up farm names to sell meat products

Not enough transparency on the carbon footprint of the food Tesco sells

While every little helps, the UK’s biggest retailer loses points for its long-term loyalty to meaningless labelling, which undermines its plant-based ambitions.

Scored against 40 indicators covering corporate policy and in store practice

TRANSPARENCY
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41.3%

5/17

0/4

5.5/8

7/9

1/4

-2/8

2nd

While every little helps, the UK’s biggest retailer loses points for its long-term loyalty to meaningless labelling, which undermines its plant-based ambitions.
Target for all UK farms to be net zero by 2035
Taking action to make animal feed more sustainable
Conducting research trials on product placement in store to promote plant-based protein
Fewer than 25% of ready meals vegetarian or vegan
Don’t currently measure full carbon footprint of business

Waitrose scored highest on sourcing meat that’s better for the planet but falls down on transparency on the carbon footprint of its food.

38.1% scored against 40 indicators covering corporate policy and in store practice

☑️ Target for all UK farms to be net zero by 2035
☑️ Taking action to make animal feed more sustainable
☑️ Conducting research trials on product placement in store to promote plant-based protein
❌ Fewer than 25% of ready meals vegetarian or vegan
❌ Don’t currently measure full carbon footprint of business

TRANSPARENCY
Show us the climate and environment impact of your meat and dairy sales
1.5/7

COMMITMENT
Lead by addressing climate change
1/4

COMMITMENT
Lead by selling less meat
4.25/8

COMMITMENT
Lead by sourcing and selling better meat
7.5/9

PRACTICE WHAT YOU PREACH
Incorporate climate goals into corporate culture
2/4

SHOW US ON THE SHELVES
Help customers find and buy less and better meat products
-1/8

Waitrose scored highest on sourcing meat that’s better for the planet but falls down on transparency on the carbon footprint of its food.
Linked board and senior management incentives to climate targets
Include both plant-rich meat alternatives and plant-based dairy alternatives in the meat and dairy aisles for easy swapping
Evidence of action to reduce meat and dairy waste
Fewer than 25% of ready meals were vegetarian or vegan
Not enough transparency on the carbon footprint of the food Sainsbury's sells

Sainsbury’s

Lack of transparency on the carbon footprint of the food they sell is undermining Sainsbury’s pledge to ‘help everyone eat better’.

Sainsbury’s

Transparency
Show us the climate and environment impact of your meat and dairy sales

Commitment
Lead by addressing climate change

Commitment
Lead by selling less meat

Commitment
Lead by sourcing and selling better meat

Practice What You Preach
Incorporate climate goals into corporate culture

Show Us On The Shelves
Help customers find and buy less and better meat products

37.5%

Scored against 40 indicators covering corporate policy and in store practice

3/7

6.5/9

1/4

1/4

3.5/8

0/8

3/4

1/4

1/4

3.5/4

0/8

3/7

6.5/9

1/4

1/4

3.5/8

0/8
Measure and have long-term targets to reduce the carbon footprint of their products.

Committing to making animal feed more sustainable.

Incorporating sustainability into their buying principles.

Fewer than 25% of ready meals vegetarian or vegan.

Use unregulated and meaningless labels like made-up farm names to sell meat products.

Targets and innovation to increase plant-based eating and reduce carbon emissions, but still a way to go on putting plants over meat and dairy.
Are taking action to reduce the environmental impact of their animal feed
Measure and have set targets to reduce the carbon footprint of their products
But, do not publicly report on these measurements or targets, making it difficult to assess progress
Uses unregulated and meaningless labels like ‘Trusted Farms’ and made-up farm names to sell meat products
Don’t have a target to increase sales of sustainable protein and plant-rich foods

Aldi slips into the bottom half of the ranking by failing to match their ambitions for expansion with the need for climate-friendly food.
Asda may focus on price, but the cost of their failure to act on meat will be high.

TRANSPARENCY
Show us the climate and environment impact of your meat and dairy sales
3.5/7

COMMITMENT
Lead by addressing climate change
0/4

COMMITMENT
Lead by selling less meat
4.25/8

COMMITMENT
Lead by sourcing and selling better meat
3.75/9

PRACTICE WHAT YOU PREACH
incorporate climate goals into corporate culture
0/4

SHOW US ON THE SHELVES
Help customers find and buy less and better meat products
-2/8

Asda scored against 40 indicators covering corporate policy and in-store practice
23.8%

- Are taking action to specifically reduce meat and dairy waste in their supply chains
- Only retailer assessed to not explicitly ban the routine use of antibiotics in livestock supply chain
- Does not have plant-based alternatives in the meat and dairy aisles
- Uses unregulated and meaningless labels like ‘Trusted Farms’ and made-up farm names to sell meat products
- No clear public targets to reduce their carbon footprint

7th
Morrisons may pride itself on its supply chains, but there were fewer signs the retailer was ready to take responsibility for its climate impact by selling less meat and dairy.

- **TRANSPARENCY**
  - Show us the climate and environment impact of your meat and dairy sales
  - Scored against 40 indicators covering corporate policy and in store practice
  - 2/7

- **COMMITMENT**
  - Lead by addressing climate change
  - 1/4

- **COMMITMENT**
  - Lead by selling less meat
  - 0.25/8

- **COMMITMENT**
  - Lead by sourcing and selling better meat
  - 4.75/9

- **PRACTICE WHAT YOU PREACH**
  - Incorporate climate goals into corporate culture
  - 0/4

- **SHOW US ON THE SHELVES**
  - Help customers find and buy less and better meat products
  - 1/8

- **Are transparent in their meat product labelling**
- **Have set a target to have net zero British farms by 2030**
- ■ But, their targets fail to acknowledge the need to sell less meat and dairy, or to integrate with board remuneration policies
- ■ Have not incorporated sustainable food sourcing and consumption principles into buyer training packages
- ■ Did not provide evidence of researching or promoting plant-based foods

Morrisons scored 22.5% against 40 indicators, with a focus on transparency and commitment to addressing climate change, but falling short in other areas such as reducing meat and dairy sales and incorporating sustainable sourcing into training.
Iceland

21.9%

26th

scored against 40 indicators covering corporate policy and in store practice

- Net zero pension options for Iceland's workforce
- Not yet measuring and publishing information on the carbon footprint of their products
- Have not set a target to specifically reduce meat and dairy waste along supply chain
- Slow progress towards increasing fruit and veg sales
- Fewer than 25% of ready meals vegetarian or vegan

Mums shopping at Iceland will expect better, with a long way to go on the frozen food experts' climate transparency, plant-based foods and meat options that are better for the planet.

TRANSPARENCY
Show us the climate and environment impact of your meat and dairy sales

COMMITMENT
Lead by addressing climate change

COMMITMENT
Lead by selling less meat

PRACTICE WHAT YOU PREACH
Incorporate climate goals into corporate culture

SHOW US ON THE SHELVES
Help customers find and buy less and better meat products

2/17

1/4

1.5/8

4.25/9

1/4

-1/8
No consistent availability of plant-based alternatives in the meat and dairy aisle
Use ‘fake farm’ names to sell their own brand meat products
Fewer than 25% of ready meals are vegetarian or vegan
Have not yet published their full carbon footprint of the products they sell, and lack a clear target to reduce this footprint
No clear, specific action taken to reduce meat and dairy waste along supply chain

At 10th place, Lidl are lagging on addressing all aspects of the climate burden of the meat and dairy they sell.

TRANSPARENCY
Show us the climate and environment impact of your meat and dairy sales
1/7

COMMITMENT
Lead by addressing climate change
0/4

COMMITMENT
Lead by selling less meat
2.5/8

COMMITMENT
Lead by sourcing and selling better meat
4.5/9

PRACTICE WHAT YOU PREACH
Incorporate climate goals into corporate culture
1/4

SHOW US ON THE SHELVES
Help customers find and buy less and better meat products
-2/8
**COMPLETE SUPERMARKET SCORECARD**

<table>
<thead>
<tr>
<th>ALIMENT NAME</th>
<th>INDICATOR OF PROGRESS</th>
<th>SCORING</th>
<th>ATTAINMENT</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SCORE</strong></td>
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<tr>
<td><strong>Aldi</strong></td>
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<td><strong>ASDA</strong></td>
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<td><strong>CO-OP</strong></td>
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</tbody>
</table>

- **Frequency**: endorsement 
- **Share**: endorsement
- **Position**: endorsement

**REFERENCES**
1) Food Foundation ‘Plating Up Progress’ 2020 supermarket analysis: https://foodfoundation.org.uk/plating-up-progress/home-page/
2) Food Foundation ‘Plating Up Progress’ 2020 supermarket analysis: https://foodfoundation.org.uk/plating-up-progress/home-page/
3) Global Canopy ‘Forest 500’ ranking, assessment year 2020: https://forest500.org/rankings/companies
5) Based on proxy: % of organic or free range chicken products listed in either shop category, out of total number of chicken products
6) Based on proxy: minimum standards. Aldi (4.17%), ASDA (1.05%), Co-op (0.0%), Iceland (0.0%), Lidl (0.0%), M&S (18.9%), Morrison’s (13.9%), Sainsbury’s (8.9%), Tesco (16.9%), Waitrose (27.9%).
**COMPLETE SUPERMARKET SCORECARD CONTINUED**

**CATEGORY NAME** | **INDICATOR OF PROGRESS** | **SOURCE** | **SCORING** | **POINTS AVAILABLE** | **TOTAL POINTS AWARDED**
--- | --- | --- | --- | --- | ---
Practice what you preach: incorporate climate goals into corporate culture | | | | | |
Offer net zero pension options across workforce | | | | | |
Questionnaire | | | 0.00 | 0.00 | 0.00 | 0.00 | 3.00 |
Link board member remuneration packages to long-term environmental outcomes, such as achieving scope 3 emissions targets | | | | | |
Questionnaire | | | 2.00 | 0.00 | 0.00 | 0.00 | 3.00 |
Incorporate sustainable food sourcing and consumption principles into buyer training initiatives | | | | | |
Questionnaire | | | 1.00 | 1.00 | 0.00 | 0.00 | 5.00 |
Show us on the shelves: help customers find and buy less and better meat products | | | | | |
Remove meat and dairy products with links to deforestation or land use change from the shelves | | | | | |
Online shop/website | | | 1.00 | 0.00 | 0.00 | 0.00 | 0.00 |
Ensure more than 25% of ready meals are vegetarian or vegan | Eating Better (reference 5) | | | | | |
Questionnaire | | | 1.00 | 0.00 | 0.00 | 0.00 | 3.00 |
Ensure that stores offer more than 20% of meat and dairy which is free range or organic | | | | | |
In store visit, online shop | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
Promotions and pricing | | | | | |
Do not offer regular promotions on meat and dairy products, except where they are close to expiry dates to avoid food waste | | | | | |
In store visit | | | -1.00 | -1.00 | -1.00 | -1.00 | -10.00 |
Include plant-based alternatives in the dairy aisle | | | | | |
In store visit | | | 0.00 | 1.00 | 0.00 | 1.00 | 4.00 |
Include plant-rich protein options in the meat aisle | | | | | |
In store visit | | | 0.00 | -1.00 | 0.00 | -1.00 | -5.00 |
Product labelling | | | | | |
Do not use misleading labelling such as ‘fake farm’ on own brand products | | | | | |
In store visit/online shop | | | -1.00 | 0.00 | 0.00 | -1.00 | -5.00 |
Do not use unregulated terms such as ‘higher welfare’ on own brand products, where these are not associated with a specific external accreditation standard | | | | | |
In store visit | | | 0.00 | -1.00 | -1.00 | 0.00 | -3.00 |
Include information on production methods and animal feed on meat and dairy labelling | | | | | |
In store visit | | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
**SCORE OUT OF 40** | | | | | | | 11.25 | 9.50 | 10.25 | 8.75 | 7.00 | 13.25 | 9.00 | 15.00 | 16.50 | 15.25
**PERCENTAGE** | | | | | | | 28.1% | 23.8% | 45.6% | 21.3% | 17.5% | 33.1% | 22.5% | 37.5% | 41.3% | 38.1%
**RANKING** | | | | | | | 6th | 7th | 1st | 9th | 10th | 5th | 8th | 4th | 2nd | 3rd
ENDNOTES


5. GRAIN & ITAP. Emissions impossible: How big meat and dairy are heating up the planet. (2018).


12. NHS. Meat in your diet - Eat Well. nhs.uk [https://www.nhs.uk/livewell/meat-nutrition/ (2018).]


AWARD WINNERS 2021

Iceland

Lidl

Tesco

THESE THREE WINNERS are making it really difficult for consumers to make good decisions when choosing alternatives to meat and dairy.
FOR MORE ABOUT THE 2021 MEAT AND CLIMATE SCORECARD

www.feedbackglobal.org/supermarkets