



MEAT US

HALF WAY

Report part 1
DECEMBER 2023



FEDERACIÓN DE
CONSUMIDORES
Y USUARIOS





**A SUSTAINABLE FOOD SYSTEM WILL BE CRUCIAL
TO ACHIEVING THE GOALS OF GREEN DEAL
IN TERMS OF CLIMATE, BIODIVERSITY, AND OTHER
ENVIRONMENTAL OBJECTIVES, WHILE
SIMULTANEOUSLY IMPROVING THE INCOME
OF RAW MATERIAL PRODUCERS AND
STRENGTHENING THE COMPETITIVENESS OF THE EU**

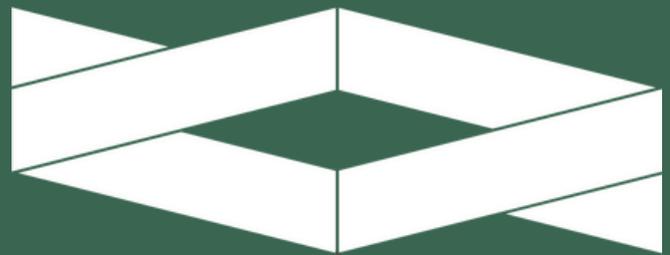
QU DONGYU, DIRECTOR GENERAL OF THE FAO



How does the agricultural sector impact our lives and the environment? 10 facts we need to know

- 1** Half of the habitable land area on Earth is used for agricultural purposes
- 2** Close to 80% of global agricultural land is used for animal farming purposes
- 3** Over the last 50 years, the greatest issue has become the transformation of natural habitats into areas for animal grazing and plant cultivation to meet the needs of farming
- 4** The animal agriculture sector contributes to global emissions at a level of approximately 14.5% of anthropogenic greenhouse gases
- 5** This sector accounts for approximately 36% of the total annual water for consumption purposes in the EU
- 6** The animal agriculture sector is also a problem of antibiotic resistance, which is the cause of around 33,000 deaths annually in the EU alone and 700,000 worldwide
- 7** Farms emit high concentrations of suspended particulate matter (PM) into the environment
- 8** The animal agriculture sector impacts not only the climate, not only the environment but also directly the quality of people's lives
- 9** The current food system exacerbates the problems of civilization-related diseases and ailments, including obesity, type 2 diabetes, cancers, high blood pressure, and ischemic heart disease
- 10** It provides unhealthy food, creating food poverty and exacerbating the already growing social inequalities

**GREEN REV INSTITUTE
FOOD ENVIRONMENT
WATCHDOGGING & ADVOCACY**



**Future Food
4 Climate**

WHAT ARE WE AIMING FOR?

Together with partners from across Europe, we have examined whether the largest retail networks, shaping and influencing the food system, consumer behaviors, and the contents of shopping baskets, transparently report and demonstrate the impact of the agricultural sector on climate and greenhouse gas emissions.

According to the report of the Intergovernmental Panel on Climate Change (IPCC), about one-third of global greenhouse gas emissions come from food systems.

The current food system also has an adverse impact on people's health, as evidenced by the fact that over 50% of European adults are overweight



WHAT SHOULD WE REMEMBER?

- 1 A good food system, including retail networks, **should facilitate the choice** of a healthy and sustainable diet
- 2 It should support the **implementation of consumers' right** to information about products
- 3 It should support the **development of sustainable methods** of food production
- 4 A good food system should **contribute to reducing the environmental footprint** from agriculture and the food industry
- 5 Equally crucial is the elevation of **global standards for sustainable production**
- 6 We need to start looking at the food system and its environment holistically, not only from the **perspective of producers and distributors** but above all from the perspective of environmental rights and human rights
- 7 We aim to **optimize the processes of food production, distribution, and consumption** to increase the efficiency of natural resource utilization and reduce environmental costs and food waste



WHY DO WE DIRECT OUR QUESTIONS TO THE RETAILERS?

Because they build and shape the shopping culture of consumers

They have a dominant position in the food system, influencing the planet, people, and animals

They can support the development of the plant-based meat and dairy substitute sector



They play a dual role—both as sellers and buyers—determining the safety and quality of food

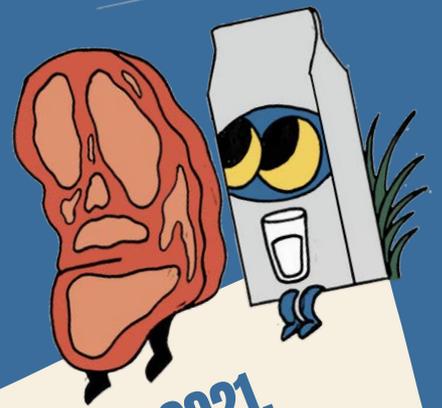
They can play a crucial role in the transition of the food system. This is emphasized, among other things, by the Farm to Fork Strategy

WHY DO WE DIRECT OUR QUESTIONS TO THE RETAILERS?

Through promotions, communication, and advertising, supermarkets, discount stores, and networks increase the purchases of specific products, the production of which contributes to rising greenhouse gas emissions, deforestation, and food waste

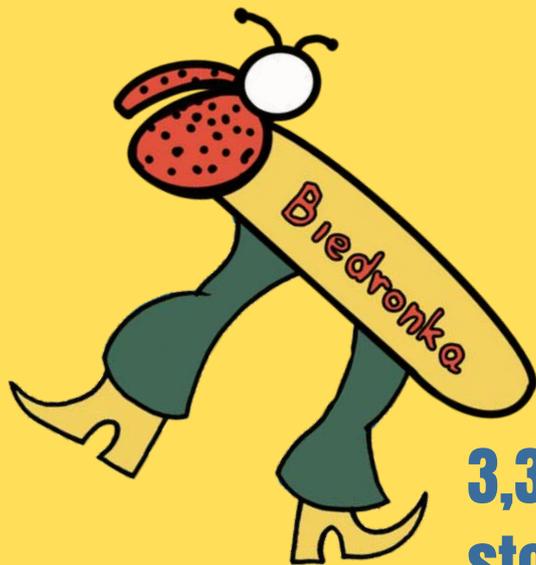
Much of the future of the green transformation and the transition to a plant-based, sustainable, and ethical food system depends on their business decisions

They have 100% influence in providing accurate and transparent information to consumers and society about the emissions of their businesses and the impact of a particular store on climate, biodiversity, and natural resources

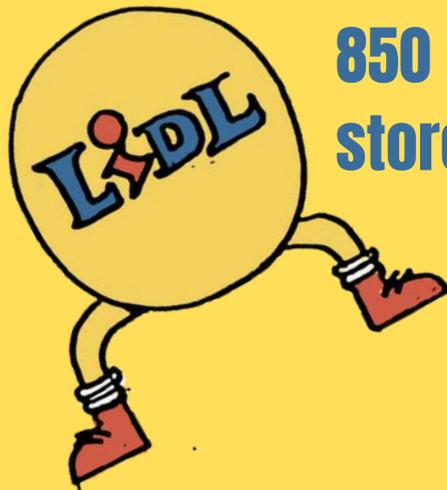


In the years 2010-2021, the number of supermarkets increased by 100%, and discount stores by 86%

WHOM ARE WE CHECKING?



3,395
stores in Poland



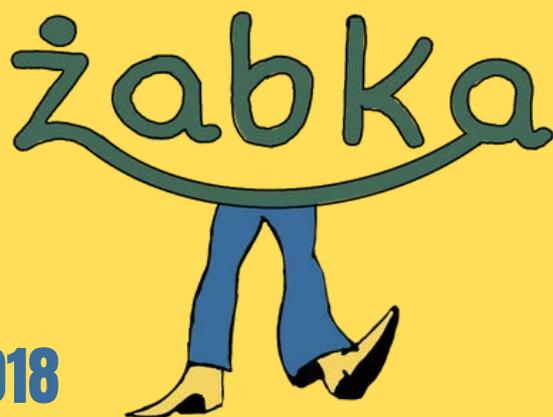
850
stores in Poland



2,340
stores in Poland



240
stores
in Poland



10,018
stores in Poland

WHY DID WE CHOOSE THESE SHOPS?



From a study of foot traffic in grocery discount stores conducted among over 470,000 consumers, it appears that in September of this year, the undisputed leader of this sales channel is still Biedronka

According to the "List of 500 Largest Companies in Poland" ranking from 2023, Jeronimo Martins Polska, the operator of the Biedronka network, increased its sales by almost a quarter in 2022, surpassing 85 billion PLN in revenue

In September 2022, stores of this network generated as much as 63.8% of all discount shopping baskets



In turn, the Lidl network generated 20.3% of all discount shopping baskets

At a similar pace, Lidl grew, generating sales of 33.3 billion PLN



The Dino network landed in the 17th position among domestic companies. It narrowly missed breaking the barrier of 20 billion PLN in revenue, but compared to competing retail networks, Dino stood out for its record growth rate



The modern convenience store network Żabka found itself in 22nd place in the ranking, while the Kaufland supermarkets were in 31st place



**21 REV'S QUESTIONS
ABOUT TRANSPARENCY
& RESPONSIBILITY**

What are we asking? 21 Questions about Responsibility

21 QUESTIONS

ABOUT TRANSPARENCY & RESPONSIBILITY

1

Do they collect and publish data on environmental emissions caused by the sale of meat, dairy, and eggs?

2

Do they collect and publish data on the sales ratio of proteins - plant-based and animal-based respectively?

3

Do they collect and publish data on environmental emissions throughout the value chain, such as the production of raw materials or semi-finished products, waste management, transportation of raw materials and products, business travel by employees, and the use of products sold by end-users?

4

Do they consider the environmental and climate impact of animal-based products through appropriate assortment adjustments?

5

Have they implemented a carbon dioxide emission reduction program in their operations? We request information on key goals, the adopted period for achieving these goals, and results in this area for the last reporting period.

6

How many new products serving as plant-based alternatives to meat, dairy, and eggs, and how many new animal-based products (meat, dairy, eggs) have been introduced for sale in these retailers from January 1, 2022, to the present?

7

What actions do retailers take to expand the assortment of plant-based alternatives to meat, dairy, and eggs, and reduce the share of meat, dairy, and egg sales?

8

What marketing activities do retailers undertake to promote the sale of plant-based alternatives to meat, dairy, and eggs?

9

What marketing activities do retailers undertake to promote emission reduction, especially in the areas (scopes) 1, 2, and 3, as mentioned in the European Parliament and Council Directive (EU) 2022/2464 of December 14, 2022, amending Regulation (EU) No 537/2014, Directive 2004/109/EC, Directive 2006/43/EC, and Directive 2013/34/EU concerning corporate sustainability reporting?

10

Within the available promotional spaces in the points of sale, do retailers promote meat, dairy, and egg products?

11

Do retailers use visible promotional spaces in the stores to promote meat and dairy products, and if so, how?

12

In the policies and actions, do retailers assess the impact of meat, dairy, and egg production on the climate crisis, such as in retailer's documents setting standards and goals related to climate policy?

13

What percentage of promotional activities using internal sales promotion media pertains to meat, dairy, and egg products, and what percentage to plant-based alternatives to meat, dairy, and eggs?

Please provide data for the period from January 1, 2022, to the present.

14

Do retailers use 'multibuy' offers on meat, dairy, and egg products?

If yes, provide data illustrating the scale, i.e., how many times a year retailers conduct such promotional activities.

15

Do retailers use 'multibuy' offers on plant-based alternatives to meat, dairy, and eggs?

If yes, provide data illustrating the scale, i.e., how many times a year you conduct such promotional activities.

16

What percentage of your network's advertising campaigns use animal-based products?

Provide data for the period from January 1, 2022.

17

Do retailers regularly publish free sales brochures (in both printed and online formats) to promote their offerings?

18

What percentage of retailers advertising campaigns use plant-based alternatives to meat, dairy, and eggs? Provide data for the period from January 1, 2022.

19

What percentage of cooking recipes includes animal-based products, and what percentage of cooking recipes are 100% plant-based or based on plant-based products?

20

What percentage of the products promoted in the recipes (please provide information using the last three editions as an example) involved animal-based products, and what percentage were plant-based alternatives to meat, dairy and eggs?

21

As part of the marketing tools used (own/supported by your publishing houses, own/supported websites, promotional brochures, etc.), do you publish cooking recipes?

THAT'S NOT ALL...

ADDITIONALLY, WE INQUIRED ABOUT OTHER ISSUES IMPORTANT TO THE SOCIETY

**Have the retailers created a Code of Conduct/Code of Practice as part of operations that addresses issues related to emission reduction, fulfilling climate commitments, and actions taken for biodiversity protection?
If yes, when?**



**If not, do they plan to create such a document, and when?
If yes, please send a scan or document in .pdf format.**

Indicate the five key goals that retailers have decided to achieve as part of the policy mentioned in point 1.

**How do retailers monitor the results of implementing the set goals?
Provide the content of the report or another type of document evaluating the implementation of the adopted policy for the last analyzed period.**

**THE RETAILERS
REMAIN SILENT,
WHILE WE ACT!**



**WE HAVEN'T RECEIVED
A RESPONSE FROM
ANY OF THE RETAILERS!**

**DO YOU WANT TO
HELP US FIND ANSWERS?**

**WHERE DO YOU
SHOP?**



**E-mail us at
kontakt@greenrev.org.
We will help you prepare your letter
to your shop**

**ASK THE RETAILER/YOUR STORE
HOW THEY CARE FOR THE ENVIRONMENT
AND HUMAN RIGHTS!**

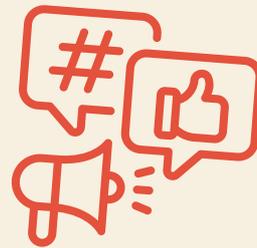
**BECAUSE THE RETAILERS
REMAIN SILENT, WE CHECK
THEIR WEBSITES
AND VISIT THEIR STORES...**



WE CONTINUE TO CHECK THE RETAILERS...



websites
of the shops



shops Some



we were
in shops



we installed
apps



we checked shops
communication

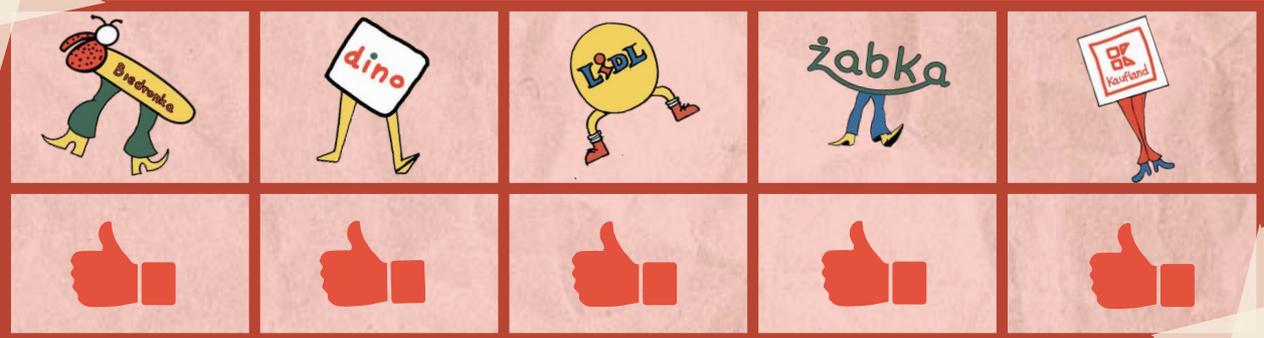
we analyzed
shops reports



WHAT ARE WE CHECKING?

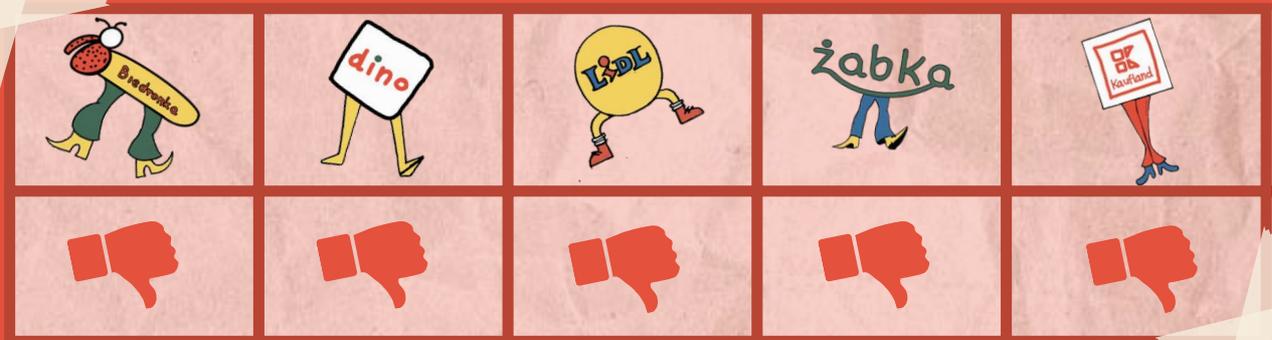
1.

Does the retailer have a policy/strategy regarding climate/environmental responsibility with specified emission targets?



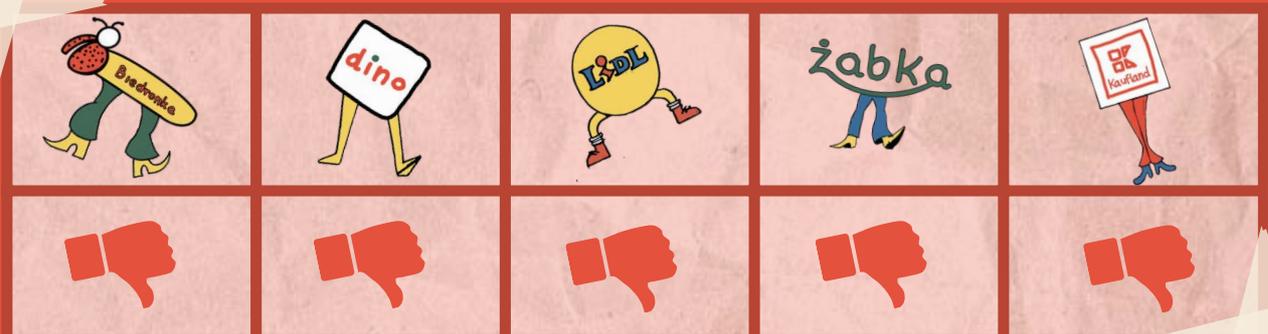
2.

Are emission reduction targets specified for meat/dairy/egg production in emission-related goals? Are animal products mentioned at all?



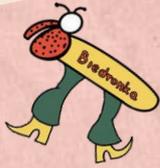
3.

Do retailers collect and publish data on emissions caused by animal-based products?



4.

Does the retailers collect and publish data on the ratio of sales for proteins - plant-based and animal-based, respectively?

5.

Are Net Zero goals planned around questionable carbon intensity reduction programs?

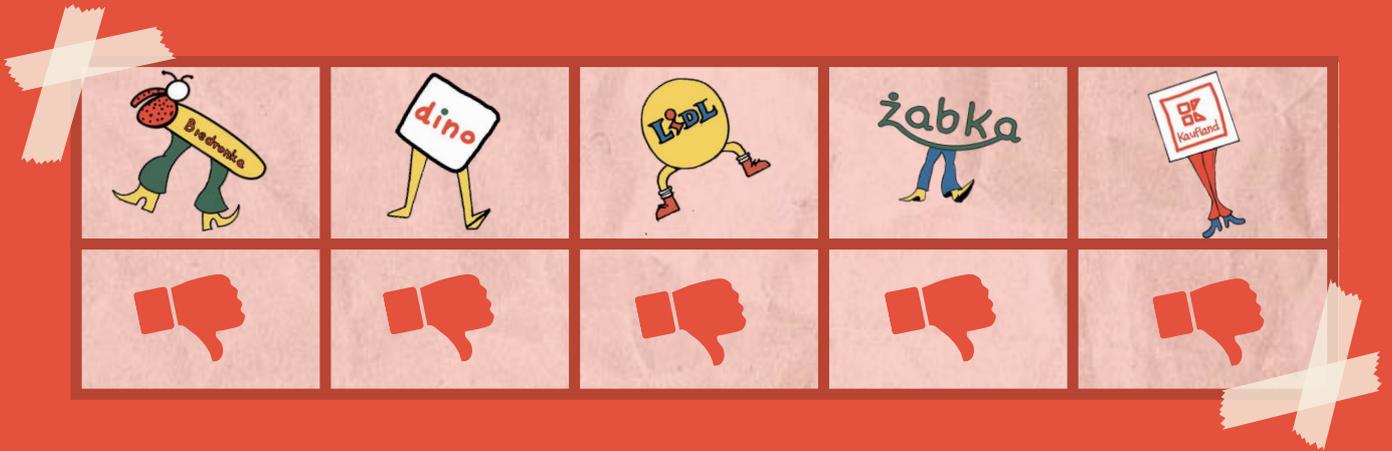
				
				

6.

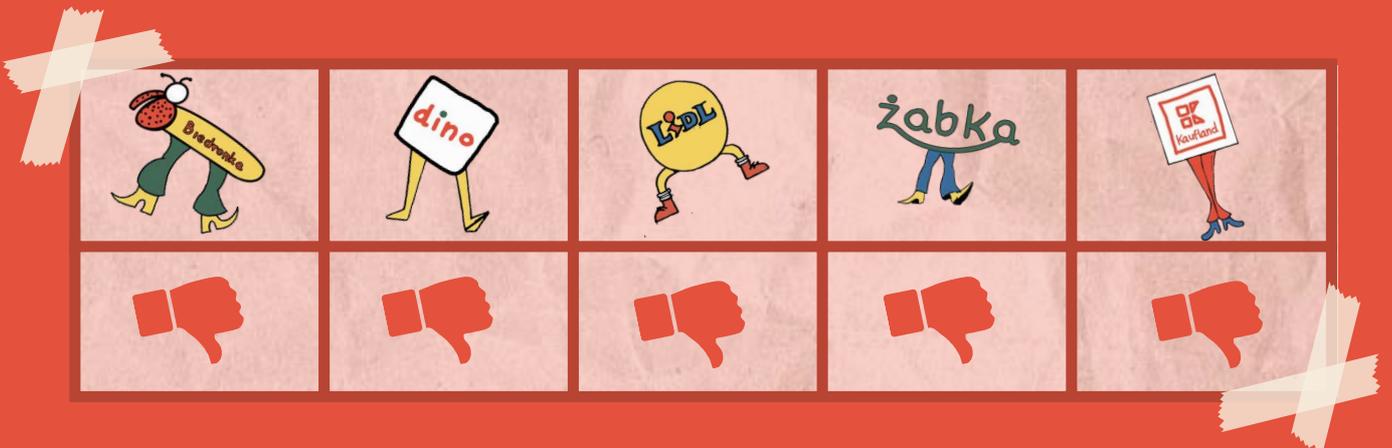
Is the retailer expanding its range of plant-based products while providing evidence of a reduction in the sales of meat and dairy?

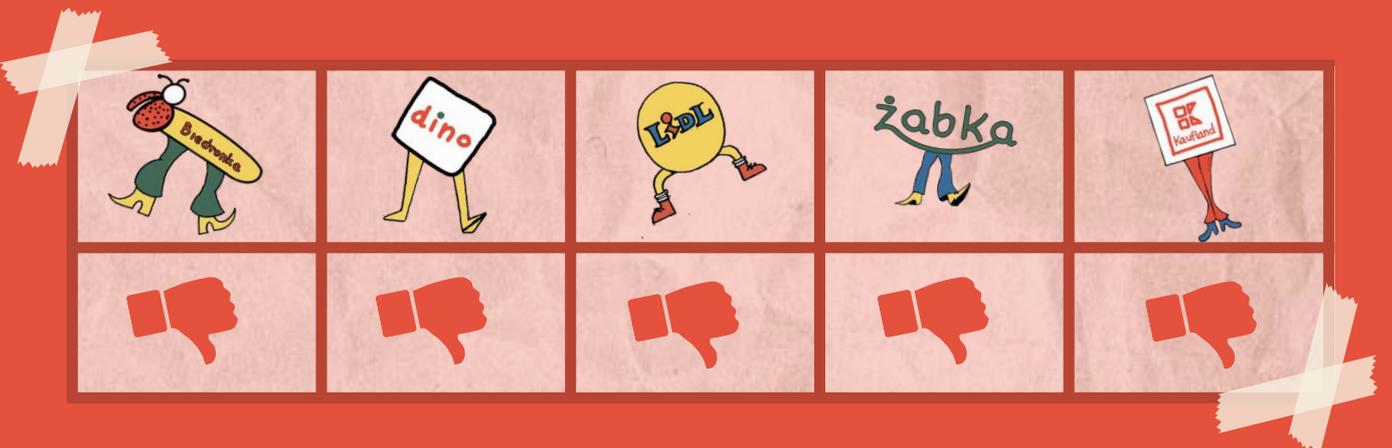
7. Does the retailer utilize prominent promotional spaces, such as those at the 'end of the aisle,' for the promotion of meat and dairy products?



8. Does the retailer promote emission reduction initiatives in Scope 3 that are minimal compared to uncontrolled and undisclosed emissions from meat and dairy?

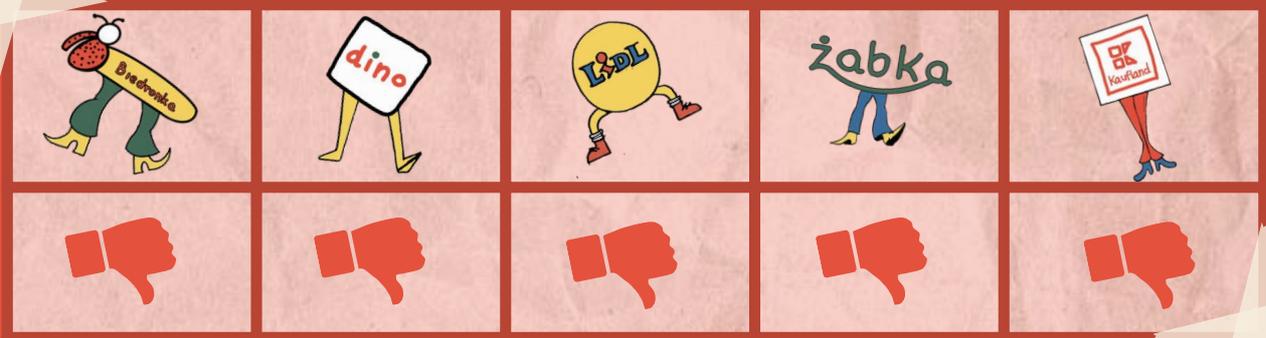


9. Does the retailer use public marketing, such as website space, in-store advertisements, and delivery vehicles, to promote emissions reduction in Scopes 1 and 2?



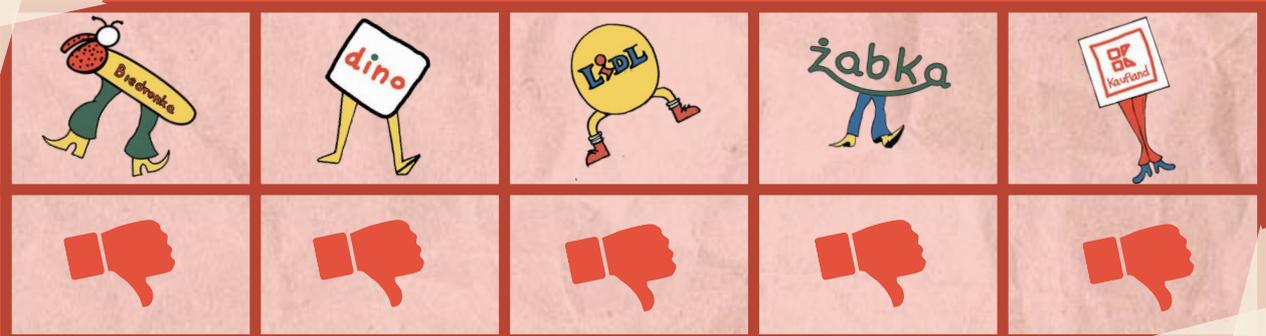
10.

Does the retailer offer promotional deals for bulk purchases of meat and dairy (multibuy)?



11.

Do the culinary recipes published by the retailers encourage consumers to purchase meat and dairy (analysis of 100 published recipes)?

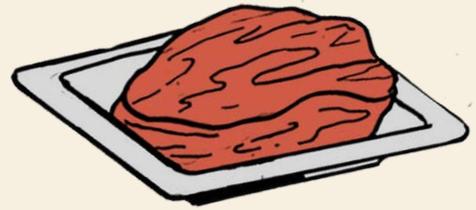


12.

Does the retailers utilize on-site and online advertising spaces to promote meat and dairy (e.g., in-store billboards and displays, online banners, homepage, meat multibooks)?



REV Conclusions

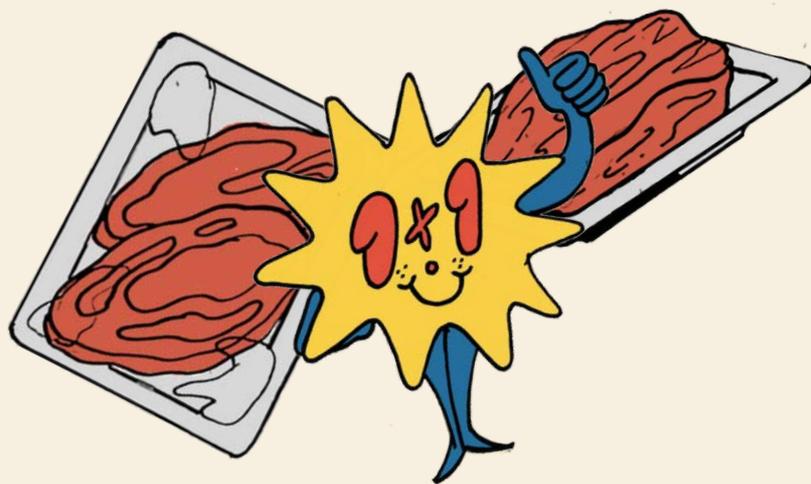


- 1** Despite all retailers having sustainable development strategies, none indicate actions related to limiting the sale and promotion of meat and dairy as a climate action goal!
- 2** All retailers indicate actions related to building the consumption of healthy and sustainable food in efforts related to shaping consumer behavior rather than limiting environmental emissions!
- 3** Retailers such as Lidl, Kaufland, Biedronka, Żabka boast about plant-based products but do not provide data on the sales of meat and dairy vs. plant-based alternatives!
- 4** In culinary recipes, retailers prioritize meat and dairy. Only 13% of all LIDL recipes are vegan, and planet-friendly recipes according to Lidl also include dairy. In the case of Biedronka, out of 10 recipes, only 3 are fully plant-based. For Kaufland, among all available recipes (939), only 23 are vegan, which is 2%.

REV Conclusions

5 All retailers focus on the development and utilization of renewable energy sources, reducing the use of plastic packaging, but none mention emissions from animal agriculture.

6 Meat and dairy are promoted in visible places for consumers in the retails.



7 Every promotional brochure of the retailers contains several pages filled with promotions on the purchase of meat and dairy.

8 Żabka app encourages the purchase of sandwiches with meat and dairy as nutritious snacks and school breakfasts, citing the Green REV Institute and Future Food 4 Climate report on the low availability of sustainable meals in educational institutions from 2022.

Project Team:

dr Marcin Anaszewicz, Anna Spurek, Morgan Janowicz

Data analysis:

Anna Spurek, Karolina Kosieradzka, Vukmir Dawtian, Lux Profus

Study visits:

Anna Spurek, Karolina Kosieradzka

Communication with the researched retailers:

Bartłomiej Gawrecki

Graphic design:

Julia Sawka

Illustration:

Elzeline Kooy

Green REV Institute:

December 2023

E-mail kontakt@greenrev.org

Adress Giordana Bruna 34 / PO Box 5,

02-523 Warsaw, Poland



@greenrev.institute



@green_rev_institute



@InstituteRev

Implemented as part of the Meat Us Half Way project