

SHELVED AGAIN:

SUPERMARKETS' MISSING ACTION
ON METHANE



Executive Summary

Often overlooked, methane is a powerful greenhouse gas responsible for around 30% of heating since pre-industrial levels.¹ The global food system plays the most significant role in producing methane: agriculture – and primarily meat and dairy production – is the largest source of human-caused methane emissions globally, responsible for 42%.² Due to the impact methane has on short-term warming, rapid cuts in methane emissions have been described by scientists as a ‘climate emergency brake’.³ However, there is a wider case for cutting emissions from food systems: even if fossil fuel emissions stopped today, food production alone would still push the planet dangerously close to a 2 °C temperature rise.⁴ While CO₂ reductions remain essential, focusing on methane reductions is critical to slowing warming in the near term.

Food retailers – or supermarkets – are the gateway to this system. As a main point of sale for food, they shape supply chains and influence consumer choices, placing them in a uniquely powerful position to drive emission reductions.^{5, 6, 7} Yet, despite this influence, the sector is defined by a growing leadership vacuum on methane, with the world’s most powerful food retailers failing to act on one of the most critical levers to slow climate change.

Shelved Again: Supermarkets’ Missing Action on Methane builds on last year’s ***Clean Up on Aisle 3*** report and its Methane Action Tracker, which set a benchmark by assessing 20 of the world’s largest food retailers. The 20 retailers are not marginal actors: combined, they generate an estimated \$2 trillion in annual revenue – comparable to the GDP of countries such as Brazil and Italy.⁸ As gatekeepers of the global food system, their decisions shape supply chains, agricultural practices and consumer diets at scale, giving them both the means and responsibility to act on methane. In 2026, we assessed these 20 retailers for the second time on methane-related disclosures, commitments and action plans, as well as the wider climate measures they have in place.

The findings reveal that the sector has failed to make meaningful progress on methane. Despite growing awareness of methane’s role in driving climate change, not a single retailer assessed publicly reported its methane emissions or published a target to reduce them. At a time when momentum is building elsewhere, with dairy and coffee brands beginning to disclose their methane emissions and develop action plans, and the first meat company setting a methane target, food retailers are falling behind.^{9, 10}

This lack of action is particularly stark among US retailers, which, along with the Spanish retailer **Mercadona**, continued to occupy the lowest ranks of the scorecard, reflecting a structural lack of climate accountability. **Kroger** is the only US retailer not in the bottom five. European retailers perform comparatively better, but the overall picture remains one of inconsistency and insufficient ambition. While some companies have improved their scores – most notably **Edeka-Verbund**, which recorded the largest increase (+17.5 points) – others have moved backwards, such as **Asda**, which showed the most significant decline (-7.5 points).

The lack of progress on methane is not due to the lack of understanding of the problem. Our research shows that 14 out of the 20 retailers publicly acknowledged the climate impact of methane from livestock in some way. More retailers now offer a wide range of plant-based alternative protein products and more report comparable data on the sales of their meat and dairy products and plant-based protein* alternatives; both of which are key steps to tackling methane emissions by shifting consumption away from high-emitting meat and dairy products. While no retailer has committed to a 60/40 plant-to-animal protein sales split, four have set less ambitious targets. **Carrefour** is the only company to score full points across the food waste category, which, while welcome, cannot substitute for action on meat and dairy methane emissions.

Although **Tesco** scored highest for the second time, it has failed to raise the bar one year on. Alongside **Tesco**, **Lidl** and **Ahold Delhaize** – ranking second and third respectively – all scored above 40 points out of 100 and have taken some important steps, including overall GHG emissions reporting, validated SBTi targets and, though limited, targets to increase sales of plant-based meat and dairy alternatives. Yet, like others, the top three fell short of credible methane action, and their position at the top of the ranking reflects weak sector-wide performance rather than meaningful leadership.

With seven of the top nine retailers having improved their scores compared to last year, the upper ranks are tightening, and there has been a slight reshuffling among the top five positions. In the middle of the tracker, a group of retailers started to improve. At the bottom sit three retailers that scored no points at all – **Albertsons**, **Mercadona** and **Publix** – and two more – **Costco** and **Walmart** – which scored below ten points.

This analysis points to a piecemeal approach, which indicates that methane remains a blind spot for retailers, not in terms of awareness, but in delivery. There is a lack of clear leadership, leaving a vacuum at the top and an opportunity for retailers within the top ten to lead by example and push the sector forward.

This is a critical oversight at a time when the first major food company to set a methane target, **Danone**, is already close to achieving a 30% reduction five years ahead of its 2030 deadline, demonstrating that rapid cuts are both feasible and already underway when companies set targets and commit to transparency.¹¹

The message from this year's scorecard is clear: there is still a leadership vacuum in methane action. Despite being among the most powerful actors in the global food system and uniquely positioned to deliver rapid emissions reductions, major supermarkets have failed to raise the bar.

This report calls for retailers to set science-based methane reduction targets of at least 30% by 2030 (from a 2020 baseline), backed by a comprehensive methane action plan covering the entire value chain and underpinned by transparent disclosure of emissions. By increasing and actively promoting their plant-based offerings and working towards a target of 60% plant-based protein against 40% animal-based protein by 2030, food retailers can strengthen their climate and methane action while enabling the necessary shift to more sustainable and healthy diets.

* The term 'plant-based proteins' includes wholefood and vegetable proteins as well as meat and dairy substitutes.

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Introduction

Supermarkets: Meat, dairy and methane

Supermarkets occupy a critical position within the food system. As a main point of sale for food,¹² retailers shape what food is produced, how it is marketed and priced, and ultimately, what consumers buy and eat. Their sourcing decisions influence global agricultural supply chains, while their product ranges, communications, store layouts and pricing strategies shape consumer demand.^{13,14}

The majority of emissions from supermarkets do not come from their stores, warehouses or logistical operations; instead, they arise from the products they sell. It is estimated that 93% of European food retailers' emissions are indirect emissions (scope 3), with meat and dairy accounting for almost half of product-related scope 3 emissions.¹⁵

Methane is a powerful greenhouse gas responsible for around 30% of heating since pre-industrial levels.¹⁶ Over a 20-year period, it has approximately 80 times the warming potential of carbon dioxide.¹⁷ Agriculture is the largest source of global anthropogenic methane emissions, accounting for 42%.¹⁸ Animal agriculture dominates these emissions, contributing 76%, while rice cultivation and agricultural waste burning account for the remaining 21% and 3% respectively.¹⁹ High levels of meat and dairy production and overconsumption continue to drive methane emissions from livestock farming, manure management and food waste.²⁰

Because methane remains in the atmosphere for a much shorter period than carbon dioxide, and has such high warming impact, scientists have highlighted²¹ that cutting methane emissions is our climate emergency brake – it can reduce short-term warming and buy us a bit more time to implement essential measures to cut CO₂ emissions to net zero. Without additional mitigation, agricultural methane emissions are expected to rise by around 8% by 2030 and 17% by 2050, compared with 2020 levels.²²

For food retailers, methane accounts for a significant, but often overlooked, part of their scope 3 emissions generated across their supply chain – from farm to store and through product use and disposal.²³ The single largest source of methane emissions in a supermarket's operations is likely to be meat and dairy products because of the outsized emissions impact of these industries. This places food retailers in a uniquely powerful position to drive methane reductions across the meat and dairy supply chain.

By engaging and supporting suppliers to cut methane emissions; shifting product portfolios; shaping consumer demands through competitive pricing and marketing; and supporting the transition towards lower-emission protein sources, supermarkets can play a critical role in reducing methane emissions from the global food system. Yet despite this influence, methane remains a major missed opportunity in the climate strategies of the world's largest food retailers.

The global shift towards plant-based food is not just intrinsic to worldwide emissions reductions; it is vital for ensuring human health.²⁴ According to professionals in the UK food sector, a 'continued focus on growth in meat and dairy sales will [...] lead to both poorer animal welfare and greater public health threats that come from increasingly intensive industrial livestock production'.²⁵

The Planetary Health Diet – the global standard for healthy and sustainable diets

The Planetary Health Diet (PHD) – developed by the EAT-Lancet Commission – is a science-based dietary pattern designed to promote optimal health for people while protecting the planet.²⁶ It should serve as a benchmark for retailers when setting targets and plans to deliver greater accessibility to, and transparency around, plant-based products.

The PHD, as updated in 2025, recommends nuts and legumes – including beans, pulses, and soy – as major protein sources, with only small amounts of red meat and dairy foods.²⁷ The EAT-Lancet Commission estimates that a global shift to the PHD diet could prevent up to 15 million premature deaths each year, including by lowering the risks of cardiovascular disease, type 2 diabetes, and certain cancers, while also halving food-system greenhouse gas emissions by 2050.²⁸

Food campaigners have outlined that based on the PHD data, when looking at protein-rich source foods, overall consumption should shift to 60% plant protein and 40% animal protein.²⁹ To rebalance food sales in line with the science behind the PHD, this report calls on retailers to set a target to increase sales of plant-based proteins to at least 60% (with animal-based proteins reduced to 40% or less) by 2030.

Increasing plant-based sales over meat and dairy should be a key strategy for retailers to reduce their methane emissions. This is because meat and dairy are significantly more emission-intensive than plant-based proteins: producing one kilogram of beef protein requires 20 times more land and emits 20 times more greenhouse gases than a kilogram of protein from chickpeas, beans or lentils.³⁰

Global progress on methane action lacking

Governments have increasingly recognised methane reduction as a critical component of global climate action. The Global Methane Pledge, launched at COP26 in 2021 and currently signed by 159 countries, commits signatories to reducing global methane emissions by at least 30% from 2020 levels by 2030.³¹

However, progress remains far off track. The UN Global Methane Status Report, published in 2025, concluded that existing national commitments would only deliver around an 8% reduction in methane emissions by 2030, far short of the 30% reduction commitment under the Global Methane Pledge.³² All 20 retailers analysed in this report are headquartered in a country that has signed the pledge.

With 2030 less than four years away, these findings underscore the urgent need to accelerate methane reductions across food systems, particularly in the meat and dairy sector.

The dairy, coffee and meat sectors have shown pockets of progress. In 2023, the Dairy Methane Action Alliance (DMAA) was launched to accelerate action in reducing global emissions of methane in the food and dairy sectors, with its ten members, including some of the largest dairy and coffee brands globally.³³ Nine dairy and coffee companies now disclose their methane emissions, and four have already reported methane reductions, including **Danone**, **Kraft Heinz**, and **Nestlé**.³⁴ In recent reporting, **Danone** disclosed that it has nearly met its target to reduce methane emissions by 30% by 2030, five years early, showing that setting targets and publishing plans can successfully deliver impact.³⁵ In the meat sector, in 2025, **Marfrig** became the first meat company to publish its methane emissions and to set a methane reduction target of 33% by 2035.³⁶

Growing regulatory emissions disclosure requirements

While we have seen some voluntary climate action across the global retail sector, progress has fallen far short of the reductions needed, especially to meet the 30% methane reduction needed by 2030, in line with the Global Methane Pledge.³⁷

Regulatory and legislative action is a crucial lever to level the playing field, improve transparency, drive action and hold corporations to account. Climate disasters have already cost global agriculture \$3.26 trillion over the past three decades, and countries are facing unmitigated food insecurity as temperatures contin-

ue to rise.³⁸ The UK government has warned that Britain's food supply is at 'strategic risk of catastrophic failure.'³⁹ Governments cannot afford to wait and must urgently create a regulatory environment that enables retailers to protect consumers.

Across Europe, the UK and the US, large corporations are operating within differing levels of climate disclosure frameworks. Guidance on climate reporting disclosure, which has become a legal requirement in some cases, has been brought forward by financial regulators and governments, though most remains voluntary.⁴⁰ While none currently mandate separate methane reporting, there is an increased focus on scope 3 GHG disclosure. This is particularly relevant to food retailers, since these emissions account for most of their footprint. The adoption of advisory good practices from institutions such as the Greenhouse Gas Protocol (GHG Protocol), which recently updated its requirements to include accounting for methane emissions across all scopes from January 2027, aims to remedy the lack of accurate, transparent and accessible scope 3 reporting.⁴¹

In Europe, the Corporate Sustainability Reporting Directive (CSRD) and the Corporate Sustainability Due Diligence Directive (CSDDD) apply to many methane-intensive companies and have the potential to improve transparency on these emissions. The CSRD will require companies to conduct a 'double materiality assessment' outlining where climate change impacts both the financial performance of the company as well as the broader social and environmental impact of the company. The CSRD will apply to the majority of the European retailers in this report (with the exception of Asda and Sainsbury's which do not operate in the EU) and to US retailer Costco which has some EU operations. Although there is no specific requirement to develop a climate plan to address these risks, whether a company has a plan or not will have to be explained, with many companies likely to develop plans if they don't already to address these risks appropriately. It is recommended that companies reporting under the CSRD follow rigorous reporting methods such as the GHG protocol. While the CSRD is a reporting and transparency mechanism, the CSDDD requires companies to take action when adverse environmental or human rights impacts occur. As a result of the deregulation at the EU level, climate change is no longer included in this due diligence, however, human health impacts and ecosystem health are included. Both impacts that are relevant to retailer policies on methane and protein. In addition to the CSRD and CSDDD EU discussions are ongoing around the need to address plant-based protein production in the EU including an updated Protein Strategy will also be published in 2026, which could impact how protein is produced in the EU, including plant-based protein.

In February 2026, the UK government published the UK Sustainability Reporting Standards (UK SRS). While the UK SRS will provide a voluntary reporting framework, the government and the Financial Conduct Authority are likely to introduce these requirements as mandatory for UK-listed companies, to replace current Task Force on Climate-related Financial Disclosures (TCFD).

In the US, certain states are pushing for improved climate disclosures from large companies. California law requires companies with revenue exceeding \$1 billion that operate in the state to report on scopes 1 and 2 emissions by 2026, and scope 3 by 2027; and similar bills have been introduced elsewhere in the US, including in Colorado, Illinois, New Jersey, New York and Washington.⁴²

In relation to food waste – another critical area for retailers to tackle supply chain methane emissions – the revised EU Waste Framework Directive, which came into force in October 2025 and introduced binding targets for retailers to reduce food waste by 30% per capita by 2030, against a baseline of the average between 2021 and 2023.⁴³ In the UK, food waste reporting is not mandatory, and most retailers voluntarily report through WRAP's Food Waste Reduction Roadmap.⁴⁴ However, there have been calls for greater transparency as a first step, even from retailers themselves.⁴⁵ In the US, the 2030 Food Loss and Waste Reduction goal, announced by the Department of Agriculture (USDA) and (EPA) in 2015, aims to cut food loss and waste by half by 2030. This goal is still valid, but there are no legally binding targets for retail specifically, nor any mandatory reporting requirements.⁴⁶

Agriculture and food production are also uniquely dependent on a stable climate and healthy biodiversity, and the material impacts of the climate and nature crises continue to become more evident. Recent studies have projected that the global economy could face a 50% loss in gross domestic product (GDP) between 2070 and 2090 from the catastrophic shocks of climate change.⁴⁷ There is an urgent need to dramatically reduce global emissions, and the global retailers assessed in this report are some of the most powerful companies in the world, which could lead the required shift in the food system to tackle global heating and biodiversity loss.

The Methane Action Tracker

Against this backdrop, the **Methane Action Tracker** assesses 20 of the world's largest food retailers by revenue – estimated to generate a combined \$2 trillion revenue annually – on their climate- and nature-related disclosures and commitments, with a particular focus on methane emissions linked to meat and dairy supply chains.⁴⁸

This second edition builds on our 2025 report, [Clean Up on Aisle 3: The Methane Mess Supermarkets Are Hiding](#), which revealed a striking lack of transparency and action across the sector. None of the retailers assessed reported their methane emissions or had set a methane reduction target.

Methodology

This report looks at the same group of food retailers across the same criteria as the first edition. The food retailers from Europe and the US were included in this assessment based on their yearly revenue, volume of grocery sales, and dominance in the meat and dairy retail market.⁴⁹

The assessed retailers are Ahold Delhaize, Albertsons Companies, Inc. (Albertsons), Aldi Süd, Asda Group Limited (Asda), Auchan, Carrefour, Casino Guichard-Perrachon S.A. (Casino), Centres Distributeurs E.Leclerc (E.Leclerc), Costco Wholesale Corporation (Costco), Edeka-Verbund, ITM Développement International (Intermarché), J Sainsbury plc (Sainsbury's), Lidl International (Lidl), Mercadona, Migros-Genossenschafts-Bund (Migros), Publix Super Markets, Inc. (Publix), Rewe Group, Tesco PLC (Tesco), The Kroger Co. (Kroger) and Walmart Inc. (Walmart).

Retailers were scored across five key categories, with 100 total points available.

- 1. The role of methane: 15 points**
- 2. Emissions reporting: 21 points**
- 3. Emissions reduction commitments and action plans: 36 points**
- 4. Food and landfill waste policies: 8 points**
- 5. Protein alternatives: 20 points**

Research took place between 1–27 February 2026. Retailers were then sent their scores ahead of publication and were given one week to respond to the findings, including by providing additional information. Only publicly available data on the retailer's own websites and the SBTi Targets Dashboard was analysed. For the detailed methodology, refer to [Annex A](#).

Methane Action Tracker 2026

Rank	Country and Retailer	Action Areas					2026 Score	2025 Score
↓ 1	TESCO PLC	10/15	7/21	15/36	6/8	10/15	48	51
▲ 2	LIDL	10/15	7/21	12/36	2/8	12.5/15	43.5	32.5
▲ 3	Ahold Delhaize	7.5/15	7/21	15/36	2/8	10/15	41.5	33
▼ 4	MIGROS	7.5/15	7/21	18/36	0/8	7.5/15	40	34.5
▼ 5	Carrefour	10/15	7/21	6/36	8/8	7.5/15	38.5	39.5
▲ 6	EDEKA	7.5/15	7/21	12/36	0/8	10/15	36.5	19
▼ 7	J Sainsbury plc	2.5/15	0/21	15/36	6/8	10/15	33.5	31
▼ 8	ALDI	5/15	0/21	12/36	2/8	10/15	29	28
– 9	REWE	5/15	7/21	9/36	0/8	5/15	26	22
▼ 10	ASDA	5/15	3.5/21	0/36	4/8	5/15	17.5	25
– 12	Auchan	0/15	7/21	3/36	2/8	5/15	17	17
– 12	Casino	5/15	7/21	0/36	0/8	5/15	17	17
▲ 13	Kroger	2.5/15	7/21	0/36	2/8	5/15	16.5	9.5
▼ 14	Intermarché	5/15	0/21	0/36	0/8	10/15	15	13.5
▲ 15	E.Leclerc	2.5/15	0/21	0/36	4/8	5/15	11.5	6.5
▲ 16	COSTCO WHOLESALE	2.5/15	7/21	0/36	0/8	0/15	9.5	6
▼ 17	Walmart	0/15	0/21	3/36	2/8	0/15	5	7
– 20	Albertsons	0/15	0/21	0/36	0/8	0/15	0	0
– 20	MERCADONA	0/15	0/21	0/36	0/8	0/15	0	0
▼ 20	Publix	0/15	0/21	0/36	0/8	0/15	0	2.5

● Role Of Methane
 ● Emissions Reporting
 ● Commitments and Action Plans
 ● Food Waste and Landfill
 ● Protein Alternatives
 Max. Score: 100 Points

Category 1

The Role of Methane

Methane mitigation is one of the most effective strategies to slow near-term global warming.⁵⁰ Meat and dairy play a significant role in driving methane emissions, with livestock agriculture accounting for around 32% of human-caused methane.⁵¹ Current meat and dairy consumption patterns significantly exceed recommended levels: for example, people in the US eat more than seven times the advised amount of red meat under the PHD, and consumption in Europe is around five times higher.⁵² This overconsumption has implications not only for the climate, but also for public health.

European retailers continue to show stronger progress in recognising the impact of methane, while their US counterparts still lag behind.

As a primary interface between production and consumption, food retailers shape both awareness and demand. Acknowledging the methane problem and informing customers about the role of livestock methane emissions in climate change is therefore a foundational step for these companies.

In this category, retailers were assessed against three indicators:

- 1.1: Does the company acknowledge the role of livestock methane emissions in contributing to climate change?
- 1.2: Does the company support the reduction of meat and dairy consumption in relation to climate change?
- 1.3: Does the company link its executive remuneration to sustainability targets linked to livestock methane emissions?

1.1 Acknowledging the role of livestock emissions in climate change

40% of the retailers (eight companies) publicly recognised the impact of methane from livestock or cattle on climate change, and scored full points: **Aldi Süd, Ahold Delhaize, Carrefour, Edeka-Verbund, Lidl, Migros, Rewe Group** and **Tesco**.



*'Methane is emitted in the agricultural stages of our value chain through enteric fermentation (livestock digestion), manure management and rice cultivation. Methane is also present downstream from decomposing food waste in landfills. Compared to carbon dioxide, methane has a shorter atmospheric lifetime but a higher warming impact. Measured over a 100-year period, it's 28 times more potent as a GHG. Given the higher global warming potential (GWP) and shorter lifespan, reducing methane can quickly slow down the rate of global warming.'*⁵³



30% of the retailers (six companies) scored half points in 2026. For the first time, this includes **E.Leclerc** and **Sainsbury's**, while **Asda, Costco, Intermarché** and **Kroger** scored half points for the second year in a row.

These retailers recognised the impact of agriculture on climate change and referred to livestock or cattle, but did not explicitly mention methane. The leadership shown by European retailers here stands in stark contrast to the US, where not a single food retailer scored full points and only two (**Costco** and **Kroger**) received half points. Among the European retailers, **Auchan, Casino,** and **Mercadona** all scored zero.

1.2 Meat and dairy consumption reduction

Casino, Lidl and **Tesco** are the only three companies that explicitly supported reducing meat and dairy consumption as a way to address climate change, and all three scored full points. **Lidl** achieved full points for the first time, whereas its parent company, Schwarz Group, did not score any points in this area last year.



*'In 2024, we launched our long-term partnership with WWF, which includes 31 Lidl countries. The five-year partnership focuses on the global environmental challenges of our time: protecting biodiversity, the climate and natural resources such as fresh water. [...] Based on the scientific principles of the "Planetary Health Diet", which recommends a more plant-based diet, we have been, over the past few years, expanding of our product range to include more vegan and vegetarian products. Through this partnership, we are deepening our commitment to more sustainable and healthy nutrition by adopting a strategy that prioritizes plant-based products and aims to reduce the consumption of animal products.'*⁶⁴

Six companies – **Asda, Ahold Delhaize, Carrefour, Edeka-Verbund, Intermarché** and **Migros** – publicly acknowledged that reducing meat and dairy products can have positive impacts on the climate, and therefore scored half points for this indicator.



'Climate and energy – livestock farming, especially cattle farming, generates a significant amount of potent greenhouse gases (methane). This exacerbates climate change.'
*'Support for conscious meat consumption – Migros recommends that its customers consume meat sensibly. Migros is also actively promoting the development, production and sale of vegan meat substitutes. With the steady expansion of the V-Love range, Migros is fulfilling its responsibility to diversify protein sources.'*⁶⁵

While **Migros** acknowledged the impact of meat and dairy production on climate change and recommends its 'customers consume meat sensibly', the retailer stops short of expressly supporting a reduction of meat and dairy products to address climate change.⁶⁶

None of the US retailers scored points for this indicator, highlighting a critical blind spot among these supermarkets, where the need to reduce meat and dairy consumption to cut emissions remains unaddressed.

1.3 Executive remuneration

Linking the remuneration (pay) of company executives (for example, those on the executive board) to sustainability targets is a critical way for companies to drive progress on issues like methane reduction, because it gives key decision-makers a direct incentive to keep the company aligned with those goals.

Despite this, no retailer in this assessment publicly documented executive pay being linked to targets for reducing methane emissions or increasing sales of plant-based alternatives.

Carrefour remained the only retailer to score half points for this indicator, as it linked its executive remuneration package to a number of CSR criteria, which included a target to achieve '650 million euros in sales of plant-based proteins by 2026'.⁶⁷ To score full points for this indicator, **Carrefour** would additionally need to tie its executive remuneration to specific methane-reduction targets.

Category 2

Emissions Reporting

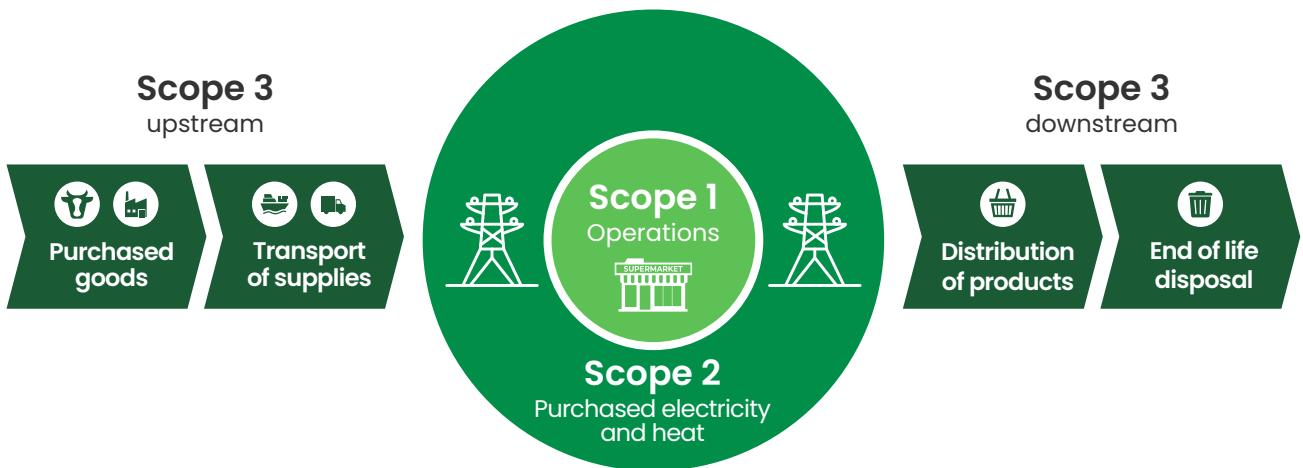
After acknowledging the role of methane in climate change, the next crucial step for retailers is to calculate and report their methane emissions across scopes 1, 2 and 3, and for meat and dairy products. Scope 3 emissions of European retailers make up an estimated 93% of their total emissions profile, with meat and dairy accounting for almost half of this.⁵⁸ Accounting and disclosure are the essential foundation for reducing real-world emissions.

In this category, retailers were assessed against three indicators:

- 2.1:** Does the company annually report its greenhouse gas emissions across scopes 1, 2, and 3?
- 2.2:** Does the company annually report its methane emissions across scopes 1, 2 and 3?
- 2.3:** Does the company annually report its methane emissions from dairy and meat products?

Not a single retailer separately discloses its methane emissions. The lack of separately reporting global methane emissions represents a huge challenge in understanding the impact of the sector and holding supermarkets accountable for much-needed reductions.

Emissions scope explainer



2.1 Emissions reporting across all Scopes

This year, companies strengthened their reporting to align with the best practices of the GHG protocol: **Costco, Edeka-Verbund, Kroger** and **Rewe Group**. They joined retailers **Ahold Delhaize, Auchan, Casino, Carrefour, Lidl, Migros,** and **Tesco** in annually reporting absolute greenhouse gas emissions across all scopes in line with the GHG Protocol. Reporting emissions across scopes 1, 2 and 3, as set out in the GHG Protocol, is critical to ensure that companies are accountable for all emissions associated with their operations, including methane – and that no emissions categories are left out in their calculations.⁵⁹

Asda scored half points for reporting emissions across all three scopes without reference to the GHG Protocol.

Albertsons, Aldi Süd, Intermarché, E.Leclerc, Mercadona, Publix, Sainsbury's and Walmart scored zero points. **Aldi Süd** dropped from half to zero points by failing to publish up-to-date data, which removes accountability for the company's climate action, including progress towards its net-zero target (see indicator 3.1) and SBTi-validated targets (see indicator 3.4). **Walmart** only reported emission data for some 'key markets' and does not use the GHG Protocol consistently for its calculations, which could mask the company's actual total emissions.⁶⁰

2.2 Methane emissions across all scopes and operations globally

None of the 20 largest retailers publicly reports its methane emissions. This poor performance mirrors last year's assessment, demonstrating the glaring and disappointing lack of progress from the retail sector on methane.

Publicly disclosing methane emissions separately in CH₄ is a crucial step to ensure that retailers can be held accountable for their role in global methane emissions, and that progress on methane can be tracked, raising the bar for others to disclose and reduce their emissions. While reporting methane in CO₂ equivalent rather than CH₄ has become an easy metric to communicate to regulators, investors, board members and the public, it masks not only the potency of methane and its climate impacts but represents a hiding of methane data.

'Improvements to the transparency, accuracy, completeness, comparability, and consistency of methane emissions data... can promote more ambitious and credible action.'

- The Global Methane Pledge, signed by 159 countries

As methane disclosure becomes more common across the dairy sector – with nine global dairy and coffee companies, including Danone and Starbucks, now disclosing their methane emissions, and one of the world's largest meat producers, **Marfrig**, having set a methane reduction target of 33% by 2035 – supermarkets will have to play catch up.^{61, 62}

2.3 Methane emissions from dairy and meat products reporting

Not a single retailer reported its methane emissions from meat and dairy products. This is a significant lack of disclosure and prevents a clear assessment of the climate impact of meat and dairy products.

A 2025 Profundo study commissioned by Mighty Earth shows that methane constitutes a massive share of the retailer's overall GHG emissions. It estimated **Ahold Delhaize's** global annual methane emissions at 11.7 million tons of CO₂-equivalents (CO₂e) (435,000 tons of CH₄) from animal product sales, making up 44% of **Ahold Delhaize's** 2023 scope 3 emissions in the forest, land, and agriculture category (26.6 million tons of CO₂e).⁶³ The study found that Ahold Delhaize is responsible for more methane emissions than Denmark or Sweden.

	Total GHG emissions animal product sales (est. mil tons CO ₂ e)	CH ₄ emissions (mil tons CO ₂ eq)			CH ₄ emissions (mil tons CH ₄)		
		Meat & Poultry	Dairy & Eggs	Total	Meat & Poultry	Dairy & Eggs	Total
Total	23.70	6.90	4.84	11.73	0.26	0.18	0.44
% of total		59%	41%		59%	41%	

Source: Profundo (2025)

Supermarkets like **Ahold Delhaize, Carrefour, Lidl** and **Tesco** all position themselves as leaders in the environmental space and have taken action across issues such as deforestation, food waste and net-zero ambitions, as reflected in this scorecard. Yet, despite this, even they fell short of reporting one of the most pressing categories of their emissions: methane from meat and dairy. If these retailers want to retain their climate leadership reputations, they will need to make progress on reducing their methane emissions – and reporting on it publicly.

Category 3

Emissions reduction commitments and action plans

To tackle their methane emissions, retailers must set clear targets and develop accompanying plans to show how they will achieve such reductions. Transparent and accessible targets and implementation plans lay out a clear pathway for retailers and their suppliers to take continued, credible action, and enable consumers and regulators to see where progress is – and, crucially, where it is not – being made.

In this category, retailers were assessed against six indicators:

- 3.1:** Does the company have a commitment to achieve net zero across its entire value chain?
- 3.2:** Does the company have a commitment to reduce methane emissions across its private-label products?
- 3.3:** Does the company have a time-bound action plan in place to meet its methane reduction targets from its private-label meat and dairy products?
- 3.4:** Does the company have SBTi-validated targets to reduce its emissions?
- 3.5:** Does the company have a commitment to reduce its absolute scope 3 emissions?
- 3.6:** Does the company have a Deforestation- and Conversion-Free (DCF) commitment?

Not a single retailer has a target in place to reduce methane emissions. Overall, there has been almost no progress in this category since last year's assessment.

3.1 Net-zero commitment

Not a single retailer publicly committed to achieving net zero by 2040 across its entire value chain. Of the retailers, 40% (eight companies) committed to doing so by 2050, and therefore scored half points: **Ahold Delhaize, Aldi Süd, Edeka-Verbund, Lidl, Migros, Rewe Group, Sainsbury's** and **Tesco**. The remaining 60% (12 companies) published either no net zero commitment or only an insufficient one – this includes all US and French retailers. Cleverly worded net-zero commitments that only covered certain types of emissions, selected stores, subsidiaries or regions did not score any points. For instance, **Walmart's** 2040 zero-emissions target applied only to its own operations.⁶⁴

The score of French retailer **Intermarché** dropped from half to zero points because in its latest (2025) annual report, the company no longer referred to a formal net-zero target, instead using only the term 'carbon neutrality'.⁶⁵ **Asda** also scored zero points, as its ambition is framed as becoming 'an end-to-end net-zero carbon emissions business'.⁶⁶

Why is 'carbon neutrality' insufficient?

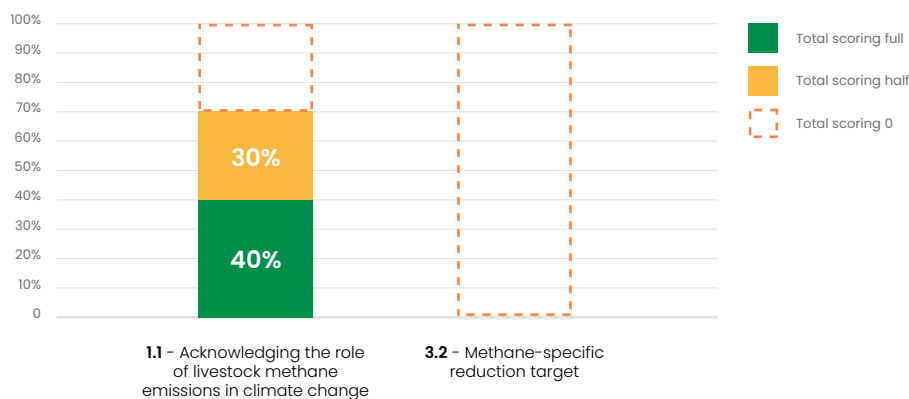
According to the SBTi, the term 'carbon neutral' 'is generally used when counting the use of carbon offsets (i.e. investing in projects that remove carbon from the atmosphere to counterbalance some or all GHG emissions). In other words, carbon neutral does not necessarily mean that direct emission reductions have taken place. Carbon neutrality claims also do not necessarily include GHGs other than carbon dioxide. [...] It does not align with the action needed to ensure global heating is limited to 1.5°C'.⁶⁷

3.2 Methane-specific commitment

Not a single retailer published a commitment to reduce methane emissions across its private-label products. Private-label products provide retailers with increased control over production and data.⁶⁸ However, even for private-label products, retailers failed to deliver. All 20 of the largest European and US retailers scored zero points. There has been no progress since last year's assessment, despite the fact that methane emissions account for a significant share of supermarkets' GHG emissions. For instance, of the Ahold Delhaize brands, Albert Heijn reported that its methane emissions accounted for approximately 16% of its total scope 3 emissions.⁶⁹

To effectively reduce their methane emissions, companies must have targets in place, and these must be science-based: to reduce methane emissions by at least 30% below 2020 levels by 2030, in line with the Global Methane Pledge.⁷⁰

Companies recognise the role of methane in climate change, but fail to set targets to cut it



3.3 Private-label meat and dairy action plans

Having missed the crucial step of setting methane reduction targets, we have yet to see any of the 20 global retailers publish a methane reduction-action plan.

Some retailers continued to actively engage in initiatives directed at reducing emissions from meat and dairy products. Four out of the top five retailers (**Ahold Delhaize**, **Carrefour**, **Migros** and **Tesco**) – all headquartered in Europe – scored half points for engaging in activities that aim to reduce emissions from meat and dairy products or for investing in research to implement changes in the future.



'We've joined forces with our milk suppliers, Arla and Müller UK & Ireland to launch the Future Dairy Partnership, a farmer-led partnership which aims to put sustainability at the heart of the dairy industry... All 400 of Tesco's Sustainable Dairy Group (TSDG) farmers across the UK will be part of the initiative. Work will include:

- *On-farm projects, such as the trial and roll-out of methane-reducing feed additives and nature-led practices.*
- *Producing an industry-wide report on the pathway to more sustainable dairy.*
- *Publishing a sustainable dairy blueprint with clear guidelines on sustainability targets and ethical practices.⁷¹*

Companies can support suppliers, especially farmers, in advancing methane reduction practices on the farm, for instance through financing and farmer outreach⁷² – though few did. Through a climate fund run in partnership with myclimate, **Migros** supported the adoption of feed additives for dairy cows among its suppliers to reduce methane emissions.⁷³

Own-brand or private-label ranges offer a clear opportunity for retailers to tackle their methane emissions without having to rely on upstream suppliers. Yet there was a clear lack of action from retailers, with 80% (16 companies) not publicly engaging in any activities reducing emissions in both meat and dairy products. For

retailers with net-zero targets, this lack of action raises a fundamental question: how do they intend to meet these commitments without addressing the single largest methane hotspot in their supply chains? Without reducing emissions from meat and dairy, these targets lack credibility.

3.4 Science Based Target initiative (SBTi) approval

40% of the retailers (eight companies) scored full points for having SBTi-validated targets: **Ahold Delhaize, Aldi Süd, Edeka-Verbund, Lidl, Migros, Rewe Group, Sainsbury's and Tesco.**

This is an improvement from only 20% (four companies) last year, with **Ahold Delhaize, Aldi Süd, Edeka-Verbund** and **Lidl** increasing their score to full points.



All of these retailers had an SBTi validated net-zero target, as well as a near- or long-term target and a Forest Land and Agriculture (FLAG) target.

SBTi

The SBTi is a partnership between CDP, the United Nations Global Compact, World Resources Institute (WRI) and the World Wide Fund for Nature (WWF). It offers detailed standards and associated guidance tools to support companies in defining pathways to GHG reduction and net-zero targets.⁷⁴ These targets are validated against a defined methodology and can be sector specific. Forest, Land Use and Agriculture (FLAG) guidance is applicable to companies where FLAG-related emissions account for at least 20% of the company's total emissions.⁷⁵

SBTi's FLAG methodology has been criticised by NGOs because it requires companies to report and set targets for 67% – rather than 100% – of their FLAG emissions, and does not require companies with targets set before 1 January 2024 to report details of their methane emissions separately. It is argued that without a target covering a company's total FLAG emissions, a comprehensive net-zero target cannot be sufficiently justified.⁷⁶ Despite these concerns, SBTi is a widely recognised standard for climate targets, used by over 10,000 companies to set and verify climate targets.⁷⁷

60% of retailers (twelve companies) scored zero points, meaning they either had not set any validated targets or their targets were not strong enough to score, which includes all the US and French retailers. **Asda, Costco, Intermarché, Kroger, Mercadona** and **Publix** have not set any SBTi-validated targets.

ASDA Asda dropped from half to zero points because the company scrapped its climate targets months after they were validated with the SBTi, in a move out of step with the urgency of the climate crisis.⁷⁸

SBTi Target Dashboard entry for Asda

Source: SBTi Target Dashboard, 27 February 2026

COMPANY	NEAR-TERM STATUS	NET-ZERO STATUS
Asda Group Limited United Kingdom, Europe	COMMITMENT REMOVED	COMMITMENT REMOVED

3.5 Scope 3 emission targets

Not a single company had a commitment to reduce absolute scope 3 emissions (i.e. indirect emissions from their value chain⁷⁹) by at least 50% by 2030 from a 2020 baseline, or earlier. This is despite up to 93% of retailers' greenhouse gas emissions being scope 3 emissions.⁸⁰

Ahold Delhaize, Auchan, Carrefour, Migros and Sainsbury's scored half points for having committed to reducing their absolute scope 3 emissions by at least 20% by 2030 from a 2020 baseline, or earlier. Meeting these targets would still leave up to 80% of those emissions unaddressed. With meat and dairy sales expected to rise⁸¹, and limited reductions from interventions such as feed additives⁸², it is difficult to see how retailers' climate and net-zero claims can be fully realised. A stronger focus on methane reduction would be a critical step towards closing this gap.

3.6 Deforestation- and Conversion-Free (DCF) commitment

Despite the long-standing spotlight on deforestation driven by commodities, such as palm oil, beef and soy, none of the retailers articulated sufficient ambition in their DCF commitments to earn full points in the latest assessment.

35% of the retailers (7 companies) – **Aldi Süd, Edeka-Verbund, Lidl, Migros, Sainsbury's, Tesco and Walmart** – scored half points for having a 2025 DCF commitment and a cut-off date, which is applicable to at least own-brand soy and beef products, but may not cover all regions. To strengthen DCF commitments from half to full points, retailers should ensure their commitments cover all relevant forest-risk commodities (palm oil, rubber, cocoa, timber and leather, in addition to soy and beef) across the entire group, with a minimum cut-off date of 2020 for all ecosystems, except the Brazilian Amazon, which should have a cut-off date of 2008 for beef and soy.

The Accountability Framework Initiative (AFI) outlines that a DCF commitment should include a 2025 target date⁸³, and a 2020 cut-off date (the date after which deforestation should not have occurred), with a specific 2008 cut-off date for the Amazon according to the Amazon Soy Moratorium (ASM).⁸⁴

Aldi Süd's DCF commitment did not cover rubber or leather, while **Sainsbury's**⁸⁵ commitments only covered own brand products. **Edeka-Verbund's** DCF commitment also did not cover rubber or leather, and its application focused on private-label products.⁸⁶ **Tesco's** commitment likewise did not apply to leather, though the company stated that it is developing specific requirements for all cattle products.⁸⁷ **Lidl's** commitment lacked a 2008 cut-off date for soy in the Amazon, in line with the ASM.⁸⁸

Walmart's commitment did not apply across all regions for all commodities. For instance, its forest policy only covered beef 'from the Brazilian Amazon and Cerrado or the Gran Chaco of Argentina and Paraguay ("Priority Regions") sold directly to Walmart as national brand or private brands products' and only covered soy 'from the Brazilian Amazon and Cerrado or the Gran Chaco of Argentina and Paraguay ("Priority Regions") sold directly to Walmart or indirectly as ingredients in Walmart private brand products.'⁸⁹ In relation to both commodities, **Walmart's** commitment does not cover Bolivia and Colombia, which are hotspot countries for beef- and soy-related deforestation in South America.⁹⁰

Carrefour dropped from half points in 2025 to no points in 2026, because the retailer moved its DCF target date for Brazilian beef from 2025 to 2026.^{91, 92}

Category 4

Food and landfill waste policies

Food waste contributes to GHG emissions twice: at the stage of production and when it is disposed of.⁹³ Meat and dairy account for less than 20% of food waste by mass but over 50% of its environmental impact, leading the European Commission to highlight that shifting towards more plant-based diets could reduce these impacts.⁹⁴

According to the UN Environment Programme Food Waste Index, 131 million tonnes of food were wasted at the retail level in 2022, which means that the retail sector accounts for 12% of total global food waste.⁹⁵

Carrefour is the only company scoring full points across the category and is therefore leading the action of food and landfill waste measures.

In this category, retailers were assessed against two indicators:

- 4.1:** Does the company have a commitment to zero food waste to landfill or incinerator?
- 4.2:** Does the company have a commitment in place to reduce its food waste?

4.1 Zero landfill food waste policy

Asda and **Carrefour** scored full points for having published a measurable group level zero-landfill or incinerator food waste goal for global operations and reports on progress annually, and **Sainsbury's** scored full points for having achieved 100% food waste diversion from landfill.

J Sainsbury plc *'We haven't sent any food to landfill since 2013 – our main priority is to ensure that any unsold food is redistributed to humans and when this isn't possible, we repurpose it for animal feed. As a last resort, it is converted into energy via anaerobic digestion. This year, 0.617 per cent of food handled was sent to anaerobic digestion, down 3.9 per cent year on year and 15.3 per cent relative to our 2019/20 baseline.'*⁹⁶

Carrefour was the only retailer to improve on its score in last year's assessment, moving from half to full points.⁹⁷ **Tesco** and **Walmart** maintained half points for having and reporting on a zero-landfill food waste policy but this is not applied across their global operations.^{98, 99}

The remaining 15 retailers – which included retailers from all countries assessed, except the UK – scored zero points, highlighting insufficient action on food waste reduction measures in Europe and the US. In light of **Sainsbury's** best practice, it is disappointing to see such a large proportion of the other retailers showing no progress on food waste.

4.2 Food waste reduction policy

Carrefour is the only supermarket to score full points for both 4.1 and 4.2.



*'Carrefour shares the Consumer Goods Forum's goal of reducing food waste by 50% by 2025 (compared with 2016).'*¹⁰⁰

E.Leclerc and **Tesco** scored full points for having a group-level food waste reduction policy to achieve at least a 50% reduction in food waste by 2025, compared to a 2016 or earlier baseline.

While **Ahold Delhaize**, **Aldi Süd**, **Auchan**, **Kroger**, **Lidl**, and **Sainsbury's** have not published a specific reduction policy, they all scored half points for supporting a policy of achieving at least a 50% reduction in food waste by 2030, compared to a baseline of 2021 or earlier. For instance, **Sainsbury's** target was to 'reduce food waste by 50% by 2030' compared to a 2019–2020 financial-year baseline.¹⁰¹

Two companies, **Asda** and **Walmart** have lost points in this year's assessment. **Walmart** has published new information revealing that its food waste reduction target is, in fact, a food waste intensity reduction target.¹⁰² Although reducing food waste intensity is a positive step companies can take, for Walmart this represents a weakening from an absolute food waste reduction target.

Meanwhile, **Asda** weakened the language used in its food waste reduction target. In 2025 the company had a commitment to reduce its food waste by 50% by 2030, with an interim target of 20% by 2025. In the 2026 assessment, references to food waste reduction only mentioned the interim 2025 target – seemingly discounting the 2030 goal – no longer meeting any scoring requirements.¹⁰³

Category 5

Protein Alternatives

Plant-based alternative proteins are increasingly mainstream throughout the world. The global plant-based protein market size was valued at 78.4 billion dollars in 2022 and is projected to reach 167.3 billion dollars by 2030.¹⁰⁴ Alternative proteins are forecast to reach 11% of global protein consumption by 2035, potentially saving 0.85 gigatonnes of CO₂e by 2030 – equivalent to a 95% reduction in aviation emissions.¹⁰⁵

This growing market presents a clear opportunity for retailers to align commercial trends with climate action. This is because meat and dairy are significantly more emission-intensive than plant-based proteins: indeed, producing one kilogram of beef protein requires 20 times more land and emits 20 times more GHGs than a kilogram of protein from chickpeas, beans or lentils.¹⁰⁶ Targets to increase plant-based protein sales should align with the outcomes advised by the PHD.¹⁰⁷ To align with the science behind the PHD, this report calls on retailers to set a target to increase sales of plant-based proteins to at least 60% (with animal-based proteins reduced to 40% or less) by 2030.

Increased plant-based offerings and sales reporting saw overall scores in this category improve the most across all categories since the last year, by five percentage points. However, progress in this area is stilted given not a single retailer has committed to increase sales of plant-based proteins to at least 60% and reduce animal-based proteins to 40% by 2030.

In this category, retailers were assessed against four indicators:

- 5.1:** Does the company offer private label/own-brand plant-based alternatives for meat and dairy products?
- 5.2:** Does the company have targets to increase its sales of plant-based meat and dairy alternatives?
- 5.3:** Does the company have a commitment of price parity between its private-label meat and dairy products, and its plant-based protein products?
- 5.4:** Does the company report comparable data on their sales of both their meat and dairy products and plant-based alternatives?

5.1 Offering of private-label plant-based alternatives

This was the highest-performing indicator of the entire assessment, with 75% of supermarkets (15 companies) awarded full points for having an own-brand range with a wide range of plant-based alternative products for both meat and dairy categories. The remaining 25% of retailers (five companies) – **Albertsons**, **Costco**, **Mercadona**, **Publix** and **Walmart** – all scored zero.

E.Leclerc¹⁰⁸ and **Intermarché**¹⁰⁹ improved their scores from half to full points by increasing their range of plant based alternative products. **Publix**'s score decreased to zero points, as the company appears to have rolled back its alternative-protein offerings.¹¹⁰



With four out of five US retailers scoring zero points, this once again highlights the weaker performance of US companies compared with their European counterparts – despite growing consumer demand, with 68% of US consumers now eating plant-based proteins at least once a week, up from 45% in 2019.¹¹¹



As consumption patterns across Europe increasingly buy plant-based food, retailers must be at the forefront of driving it further and not just following the change in consumer behaviour. The Spanish retailer **Mercadona** was the only European supermarket not to score any points under this indicator.

Companies without plant-based offerings risk losing market share as this sector grows and may alienate consumers – particularly Millennials and Gen Z consumers, who show a stronger preference for plant-based foods.¹¹²

5.2 Alternative product range sales increase targets

Despite the high number of retailers with their own-brand offerings of plant-based protein products, not a single one has publicly set a target to increase sales of plant-based proteins to at least 60% (with animal-based proteins reduced to 40% or less) by 2030.

20% of retailers (four companies) scored half points for setting a target below 60%, or only a total sales-based target, or one that does not apply globally. **Ahold Delhaize** has announced a protein split target of 50% by 2030 for its European food retail brands, with a more ambitious protein-split target of 60% plant-based sales by 2030 for its Dutch brand **Albert Heijn**; however, no equivalent target seemed to exist for its US operations.¹¹³ **Carrefour's** objective was 'to increase plant-based protein sales in Europe to 650 million euros of sales by 2026 (an increase of 65% vs. 2022).'¹¹⁴ **Lidl** has set a target to 'increase the share of plant-sourced food – such as plant-sourced proteins, whole-grain products, fruit and vegetables – by 20 percent by 2030, compared to 2023'.¹¹⁵ **Tesco's** target of '[i]ncreasing sales of plant-based meat alternatives by 300% by December 2025 in UK, ROI and CE' should be both reported on and renewed in 2026.¹¹⁶



Compared to last year's assessment, **Asda** no longer reported having a previous plant-based sales target, decreasing its points for this indicator from half to zero and further reducing the retailer's overall score.

By setting ambitious targets for plant-based protein sales, supermarkets can ensure they are raising the bar, not just meeting it.

5.3 Prices of private-label alternatives

Not one retailer had a global policy of price parity between private-label plant-based protein products. As in last year's report, **Lidl** was the only retailer to score at all, receiving half points for having published a price-parity policy in the German market for the majority of its **Vemondo** range.¹¹⁷



'Since October 2023, Lidl in Germany has been offering the majority of its vegan private-label range, Vemondo, at the same price as comparable animal products, and has therefore broken down a market barrier. Plant-based alternatives are no longer more expensive.

The effects are measurable: According to a 2024 study published by the ProVeg nutritional organization, sales of vegan products have risen by over 30 percent since the introduction of the price parity.'¹¹⁸

Recognising that prices and product familiarity are key factors in consumers' purchasing decisions, retailers could boost their plant-based sales through price-parity policies,¹¹⁹ combined with better positioning and promotions equivalent to those applied to meat products.¹²⁰

5.4 Alternatives sales figure publication

Aldi Süd, Edeka-Verbund, Intermarché and **Sainsbury's** all scored full points for reporting figures that allow for a comparative analysis of meat and dairy sales with the sales of their plant-based alternatives globally. This is an increase of 15 percentage points in companies scoring full points compared to last year. **Edeka-Verbund** increased its score from zero to scoring full, having published new reporting:



*'81% of the particularly protein-rich products (excluding dairy products and their plant-based alternatives) contain animal ingredients, while 19% are plant-based.'*¹²¹
(Translated from German)

Lidl, Tesco, Ahold Delhaize and **Migros** scored half points for reporting a comparative analysis but only in some regions. The remaining 60% (12 companies) failed to do so at all.

For instance, **Lidl** reported a comparative analysis of meat and dairy sales for a number of its operational countries, including Germany:



'Currently, the protein split in Lidl's product range in Germany for fiscal year 2024 is 11.3 percent plant-based to 88.7 percent animal-based protein sources. While we were able to increase the quantity of plant-based protein sources in all categories compared to the previous year, animal-based protein sources saw a stronger increase, resulting in a decrease of 0.5 percentage points in the share of plant-based protein sources.'

*For dairy products, the split is 6.0 percent plant-based dairy alternatives to 94.0 percent animal-based dairy products. This represents a decrease of 0.6 percentage points in the share of alternative dairy products compared to the previous year. This decline is due to an adjustment in the WWF methodology for fiscal year 2024, in which butter, margarine, and vegan butter are categorized as fats, whereas in fiscal years 2022 and 2023 they were categorized as dairy products or dairy alternatives, respectively.'*¹²² (Translated from German)

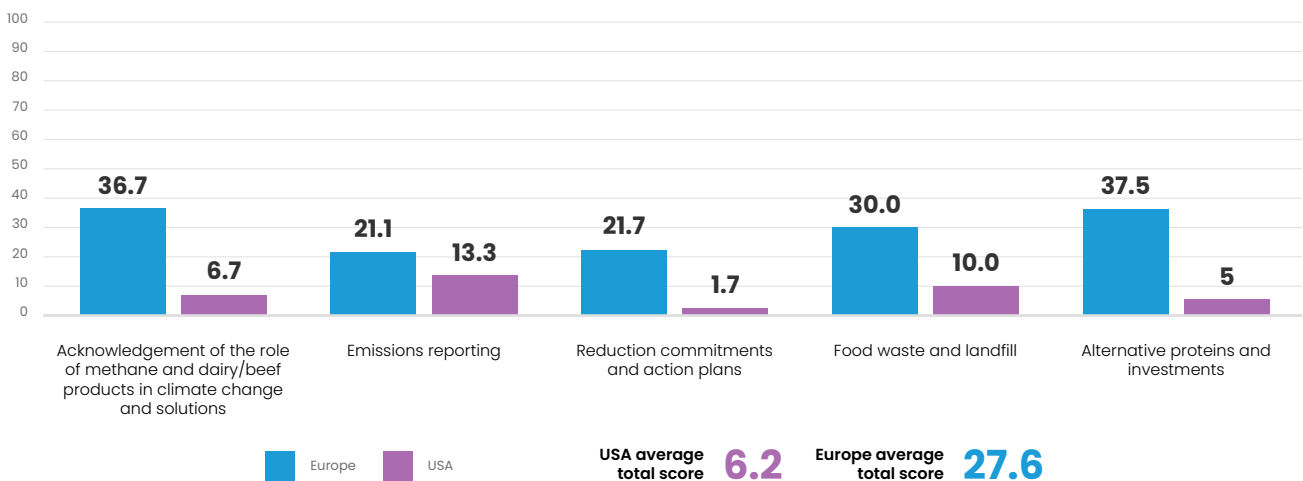
Conclusion

One year on from **Clean Up on Aisle 3**, which set the benchmark for retailer performance, the central finding remains unchanged: the world's largest food retailers are still failing to act on methane.

Despite growing awareness of livestock and methane's role in driving climate change – with 70% of retailers recognising the issue in some way – not a single retailer assessed publicly reported its methane emissions or has published a target or an action plan to reduce them. The bar has not been raised, and the leaders are not leading. At a time when momentum is building elsewhere, as dairy and meat companies begin to disclose methane emissions and set action plans, food retailers are falling behind.

This lack of action is particularly stark among US retailers, which – alongside the Spanish retailer **Mercadona** – continue to occupy the lowest ranks of the scorecard, reflecting a structural lack of climate accountability. **Kroger** is the only US retailer not in the bottom five. European retailers perform comparatively better, but the overall picture remains one of inconsistency and insufficient ambition.

European retailers outperforming those in the US: average scores for each methodology category



While some companies have improved their scores – most notably **Edeka-Verbund**, which recorded the largest increase (from 19 to 36.5 points) – others have moved backwards, such as Asda which showed the most significant decline (dropping from 25 to 17.5 points).

Even so, there are small pockets of progress. The majority of European retailers acknowledged the climate impact of methane from livestock in some way and while no retailer has committed to a global 60/40 plant-to-animal protein split or a corresponding reduction in meat and dairy sales, four set less ambitious or regional targets and two retailers have expanded their plant-based product ranges. **Carrefour** scored full points across the food waste category. While this is a step in the right direction, it should be noted that food waste only represents a small fraction of the overall methane challenge and cannot substitute for action on meat and dairy supply chains.

Leadership vacuum

Although **Tesco** achieved the highest score for the second time, it has failed to raise the bar one year on. Alongside **Tesco**, **Lidl** and **Ahold Delhaize** – ranking second and third respectively – all scored above 40 points out of 100 and have taken some important steps, including overall GHG emissions reporting, SBTi-validated targets and, though limited, targets to increase sales for plant-based meat and dairy alternatives. Yet, like others, the top three fell short of taking credible methane action, and their positions at the top of the ranking reflect weak sector-wide performance rather than meaningful leadership.

With seven of the top nine retailers having improved their scores compared to last year, the upper ranks are tightening and there has been slight reshuffling among the top five positions. In the middle of the tracker, a group of retailers started to improve. At the bottom are three retailers which scored no points at all – **Albertsons**, **Mercadona** and **Publix** – and two more – **Costco** and **Walmart** – which scored below ten points.

This analysis points to a piecemeal approach which indicates methane remains a blind spot for retailers not in awareness, but in delivery. There is a lack of clear leadership, creating a vacuum at the top for retailers within the top ten to lead by example and push the sector forward.

We see the impact leadership can have in pushing progress elsewhere. For example, in the dairy sector, **Danone** became the first company to set a methane target and disclose its emissions in January 2023.¹²³ Once it assumed this role as a frontrunner, **Danone** had an interest in progressing action across the rest of the sector. Through the formation of the Dairy Methane Action Alliance (DMAA) by the Environment Defense Fund (EDF) other dairy and coffee brands are taking action on methane.¹²⁴

In 2025, **Marfrig** became the world's first meat company to disclose its methane emissions and to set a methane reduction target of 33% by 2035. Given the size and scale of the methane footprint of meat and dairy companies, this serves as evidence that it is possible to not only calculate and disclose this information but also set a public methane reduction target.

In the retail sector, the methane disclosure by Dutch-based retailer **Albert Heijn** – part of the **Ahold Delhaize** group – raises an important question: if one brand can disclose this information, what is stopping the rest?

Ahold Delhaize, **Auchan**, **Casino**, **Carrefour**, **Costco**, **Edeka-Verbund**, **Kroger**, **Lidl**, **Migros**, **Rewe Group** and **Tesco** all reported overall GHG emissions for scopes 1, 2 and 3, in line with the GHG Protocol, meaning they had to account for disaggregated methane emissions across all scopes. Since the underlying data exists, this represents a clear gap in transparency rather than a lack of capability. Proactive leadership is now essential to raise the standard of methane reporting and transparency across the sector.

This failure is particularly striking given the unique position of retailers to influence our food environments. The retail market is highly consolidated; for example, the four biggest retailer groups in Germany control approximately 75% of the national food retail market¹²⁵ and hold considerable shares beyond the country's borders. These global supermarkets have unparalleled influence over both supply chains and consumer choices; through their product ranges, pricing strategies, and in-store environments, they have the power to shift diets at scale and drive emissions reductions across the food system. Yet, despite this, retailers are not using the tools at their disposal.

The consequences of inaction are clear: the UN has already declared that *'every key climate indicator is flashing red'*.¹²⁶ Cutting methane emissions is one of the fastest ways to slow global heating in the near term, and failure to address it undermines the credibility of retailers' broader climate commitments. Net zero targets that ignore methane emissions from meat and dairy supply chains are incomplete at best and misleading at worst. Without urgent action, retailers are upholding high-emission food systems that are incompatible with a 1.5 °C pathway.

The message from this year's scorecard is unequivocal: there is a dangerous leadership vacuum. Food retailers must rapidly move beyond mere acknowledgement and deliver on action to reduce methane emissions. This means setting science-based methane reduction targets, publicly reporting methane emissions across their value chains, and implementing clear strategies to shift sales towards plant-based proteins and support methane mitigation measures.

Recommendations

The retail sector as a whole must acknowledge methane risk:

- Climate change and the associated impacts are material risks for retailers – be they operational, regulatory, or financial. Reducing these risks starts with all retailers recognising methane’s role in climate change and its direct link to animal agriculture and meat and dairy consumption.
- Retailers that have already publicly acknowledged the links between climate change, methane and meat and dairy products must go further to incorporate methane emission reduction targets and plant-based sales increases into executive remuneration packages to drive ambition and deliver results.

Retailers must increase transparency in climate reporting. This can be achieved by:

- Annually reporting methane emissions across Scopes 1, 2 and 3, as outlined in the GHG Protocol 2.0 methodology (with independent verification). Overall, GHG emissions should also be reported publicly in the same way.
- Publishing methane emissions from meat and dairy products, to help inform relevant climate plans, and help consumers to make more informed decisions on product choices.

Retailers should make climate action a top priority by implementing bold climate plans which include methane plans and targets. This can be achieved by:

- Committing to a science-based methane reduction target of at least 30% by 2030 (from a 2020 baseline).
- Putting in place a time-bound action plan to meet the retailers’ methane reduction targets from its private-label meat and dairy products.
- Establishing and committing to a collective net zero target by 2040 or earlier.
- Adhering to science and setting methane reduction targets of at least 30% below 2020 levels by 2030.
- Adhering to AFi standards by implementing a group-wide policy of zero deforestation and conversion of forest risk commodities by 2025, including relevant cut-off dates.
- Ensuring that the net zero emissions targets are backed by a comprehensive plan for the entire value chain, with time-bound interim targets and specific actions to achieve them.

Companies must increase their ambition and financial support for scaling plant-based products. They can do this by:

- Investing in alternative proteins, including an extensive and attractive own-brand plant-based product range across the entire retailer’s group and global operations.
- Setting a target of at least 60% plant-based versus 40% animal-based ratio by 2030 and regularly reporting on progress publicly.
- Supporting this with a group-level price parity policy to ensure that alternative proteins and plant-based products are attractive to consumers.
- Shifting marketing efforts and food displays in stores to incentivise the consumption of healthy and sustainable plant-based proteins (including wholefoods such as legumes and traditional alternatives, such as tofu) and away from meat and dairy.

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