

Sourcing Better Checked Out



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Are retailers working towards sustainable sourcing?



At the moment, UK retailers are failing to drive more sustainable food production. They need to start sourcing 'better' meat and dairy (according to our [Sourcing Better framework](#)), and working towards the 'best' standards of production.

Sourcing 'better' means working with farmers who rear fewer animals, within healthy ecosystems with more natural diets from sustainable sources, in well managed farms that deliver high standards of animal welfare. This way of farming will have better soil health and fertility for crop production, support biodiversity and reduce reliance on imported feedstocks, fertilisers and pesticides.

We reviewed the published policies of the 10 major UK retailers against the 12 key outcomes set out in our framework. We found transparency is poor, progress across the different impact areas is uneven and there are no commitments to reduce the amount of farmed animals or meat and dairy sold.

We are asking retailers to develop a plan to address each issue area and publish progress against targets. We also want retailers to commit to a targeted reduction in the volume of meat and dairy sold.

Methodology



In March 2022, we reviewed the publicly available policies and information published by Waitrose, Lidl, M&S, Tesco, Sainsbury's, Asda, Morrisons, Aldi, Co-op and Iceland. We have reviewed the retailers' published commitments against the 12 outcomes set out on Eating Better's Sourcing Better framework.

Each retailer was scored for all 12 areas on their level of ambition, the extent of their reporting and how far ambitions are put into practice. For each impact area, we assessed whether retailer policies met our Basic, Better or Best thresholds. In this way, each retailer achieves a cumulative score up to a maximum of 12 for each area.

We then combined the scores of all the retailers as a measure of total action in each of the 12 areas. The results are shown on our ['Tracking action across the sector: overview of issues'](#) graph.

After scoring each of the retailers across all areas, we assigned a total score and compared this against the sector average. We were then able to chart activity by retailers across the different impact areas.

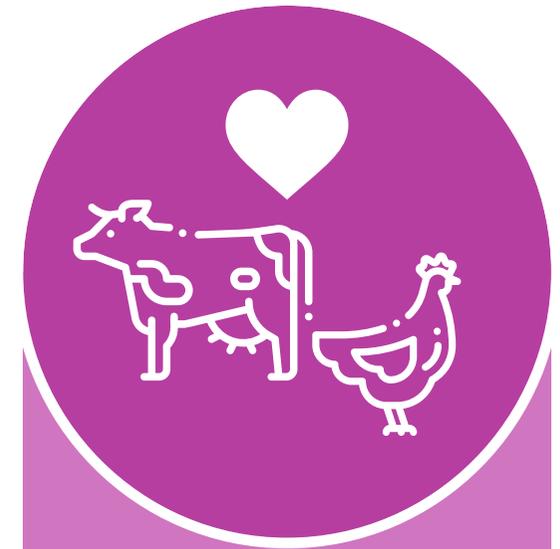
The results are plotted into our ['how are retailers doing'](#) graphs. They show the overall level for each retailer based on our assessment. Retailers are listed within each step in alphabetical order.

**Action in each
issue area**





Good animal welfare



BETTER means:

- Having better livestock welfare requirements
- Having more than 10% of the supply chain that meets Better or Best standard

BEST means:

- Exceeding EU free-range or organic criteria for poultry and pigs
- Pasture-rearing and strong animal welfare monitoring for cattle
- More than 50% of the supply chain meets the Better standard and at least 20% must meet Best standards

Most retailers report on animal welfare

Leading retailers:

- Ban close confinement
- Require full traceability of livestock products
- Report on positive welfare outcomes as well as the required key health indicators
- Require farmers to outdoor-graze cattle for at least 120 days a year
- Only source outdoor-raised pork
- Set higher standards of poultry stocking densities



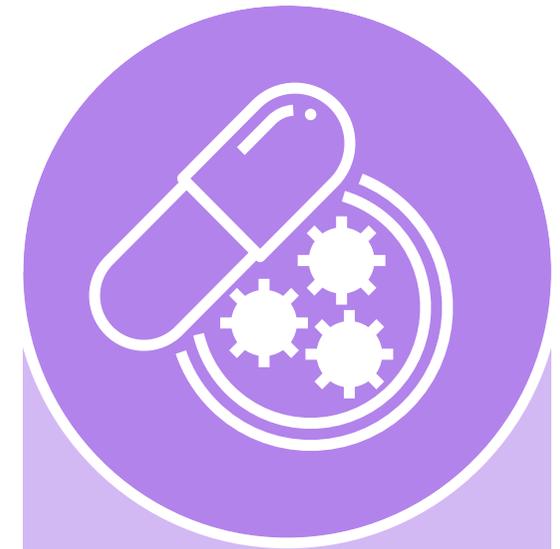
Responsible antibiotic use



Policies on antibiotic use are some of the strongest in terms of reporting and transparency

Leading retailers:

- Publish comprehensive data on antibiotic use in their supply chain
- Require an annual, on-farm herd health and welfare plan
- Require diagnostic testing prior to any antibiotic use
- Prohibit the use of antibiotics that are [critically important](#) to human medicine, other than as a last resort after diagnostic testing and veterinary guidance
- Ban the use of the last-resort antibiotic, colistin



BETTER means:

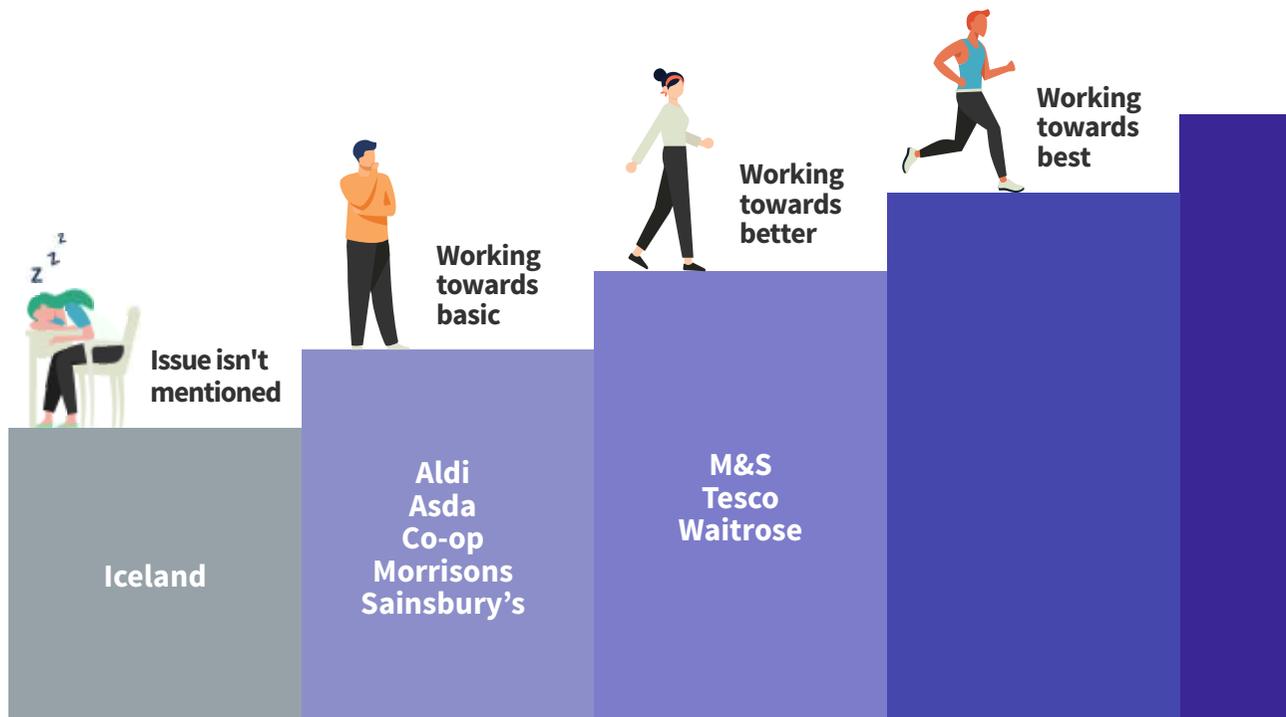
- Publishing targets for antibiotic use reduction and reporting against them
- Mostly using antibiotics for individual pigs, cattle and sheep and not whole-herd treatments
- Not giving antibiotics for growth or routine treatment

BEST means:

- Meeting 'better' standards as well as completely avoiding colistin
- Drastically restricting the use of other 'Critically Important Antibiotics' for human medicine
- Lowering the use of non-medically important antibiotics



Raising fewer animals



Policies to reduce carbon emissions are not ambitious enough

We found no commitments to reduce the number of raised animals as part of emission reduction strategies. Reporting on commitments to protein diversification in sales is very limited. Reduced livestock densities are indirectly reported as part of animal welfare measures. Leading retailers:

- Acknowledge the need for protein diversification
- Commit to lower stocking densities



BETTER means:

Working towards committing to protein diversification in sales, and lower livestock densities

BEST means:

Having sourcing policies that favour lower densities and encourage producers to lower livestock numbers in line with carrying capacity of the land



Improving on-farm GHG performance



There is not enough transparency on on-farm emissions

Several retailers report overall GHG emission footprints, but there is little transparency on actual emissions or reduction targets for farms. Baseline on-farm emissions have not been published against reduction targets. Leading retailers:

- Set net-zero scope 3 emissions reduction targets, specifically tracking and reporting on-farm emissions reductions
- Commit to achieve net-zero GHG emissions across all supplying farms by 2035 by using regenerative practice



BETTER means:

Producers are required to measure on-farm emissions and have plans to reduce them

BEST means:

- Having sourcing policies that favour lower overall emissions and reduction targets are reported, and are lower than the product benchmark
- Producers are encouraged to integrate shrubs and trees in pastures to promote healthy soils, reduce GHG emissions and encourage biodiversity



No deforestation



Most retailers have no commitments to reduce the volume of soy in their supply chain

Reporting on the amount of certified deforestation-free soy is strong, although retailers focus on the amount of certified soy imported and subsequent increases in certification. There is limited transparency on the proportion that is uncertified. Leading retailers:

- Are committed to eliminate all deforestation in the supply chain and only source physically verified deforestation-free soy from 2025, in line with the UK Soy Manifesto



BETTER means:

Aiming to reduce the overall volume of soy, palm kernel meal and cereals in animal feed and having no soy from moratorium areas

BEST means:

Having additional targets to reduce uncertified soy and palm kernel from the supply chain



Less land for feed



We found little evidence of initiatives to use less purpose-grown animal feed

Some retailers report using alternative animal feeds, including silage, barley and legumes, but none provide quantitative reporting on the percentage of animal feed derived from these alternative sources, including the retailers with policies aimed at reducing total soy, palm and cereal use in their supply chain. Leading retailers:

- Favour locally sourced and alternative animal feed, using less traded soy
- Use pasture-based systems wherever possible, supplementing with locally sourced barley, maize and legumes as well as access to grass or silage



BETTER means:

Having targets to increase the use of alternatives to soy, palm or cereal feeds, or favour certifications that have local feed requirements, i.e. organic

BEST means:

Favouring exclusively pasture-based systems and exploring the use of agricultural byproducts and waste as the main source of animal feed or as supplement to pasture



Biodiversity of the farmed landscape



We found a lack of effective policies to support local biodiversity in farming landscapes

There is almost no reporting on biodiversity beyond topline ambition statements. Pesticide use is better reported, usually against a baseline year, showing reductions in use. Leading retailers:

- Encourage all dairy farmers to commit at least 10% of their farmland to biodiversity elements and habitat management
- Encourage producers to integrate and prioritise Integrated Pest Management strategies as an alternative to pesticides



BETTER means:

Retailers require producers to have specific management plans for biodiversity, including grassland management and livestock grazing

BEST means:

Retailers dedicate at least 10% of on-farm land to biodiversity elements, adding or maintaining species-rich hedges, woods, and meadows, and have low use of synthetic fertilisers and pesticides



Soil health



There is no transparency on strategies to maintain healthy soils

We found no publicly available reporting on specific soil health indicators, or policies to limit insecticidal veterinary medication use that is harmful to soil health. Leading retailers:

- Set out commitments to protect soil health and promote better management practices
- Set out policies to report on the percentage of key suppliers with 'robust on-farm soil health improvement plans'

However there is no information on the indicators used to assess the above



BETTER means:

Retailers require producers to improve or maintain soil fertility and structure, manage organic matter and avoid synthetic fertilisers

BEST means:

Retailers set requirements to support soil health, including keeping stocking densities that meet organic certification thresholds, and restricting use of insecticidal veterinary medications that remain present in manure fertilisers and the soil

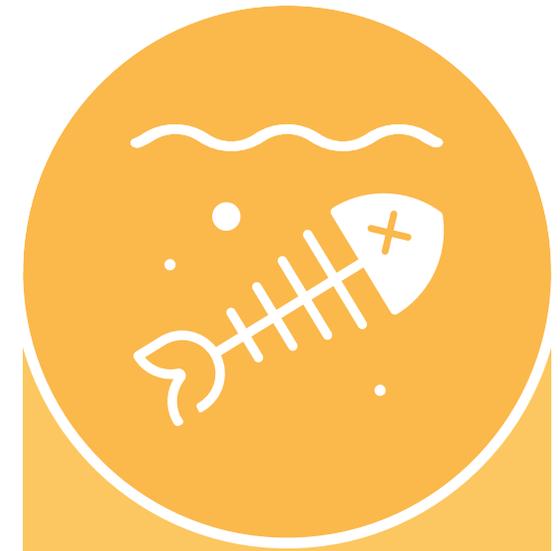


Reducing local pollution potential



We found no evidence of effective policies to reduce local pollution potential from farming

We found no policies that explicitly require producers to use protection measures for water, soil and air. There is no available reporting on tree and shrub cover.



BETTER means:

Retailers require farms to implement nutrient balance and protection measures for water, soil and air

BEST means:

Retailers limit the number of livestock that graze a woodland, favour feed from local sources, and integrate trees to trap pollutants



Using less pesticides to grow feed



Some retailers report on pesticide use but progress is uneven

There is little available information on integrated pest management implementation. Leading retailers:

- Measure and report total usage of pesticides throughout the supply chain
- Operate effective pesticide policies, reporting reductions in overall use and pollution risk factors that achieve or surpass Pesticide Action Network UK indicators
- Have stringent restrictions on, or have banned the use of, the most hazardous pesticides



BETTER means:

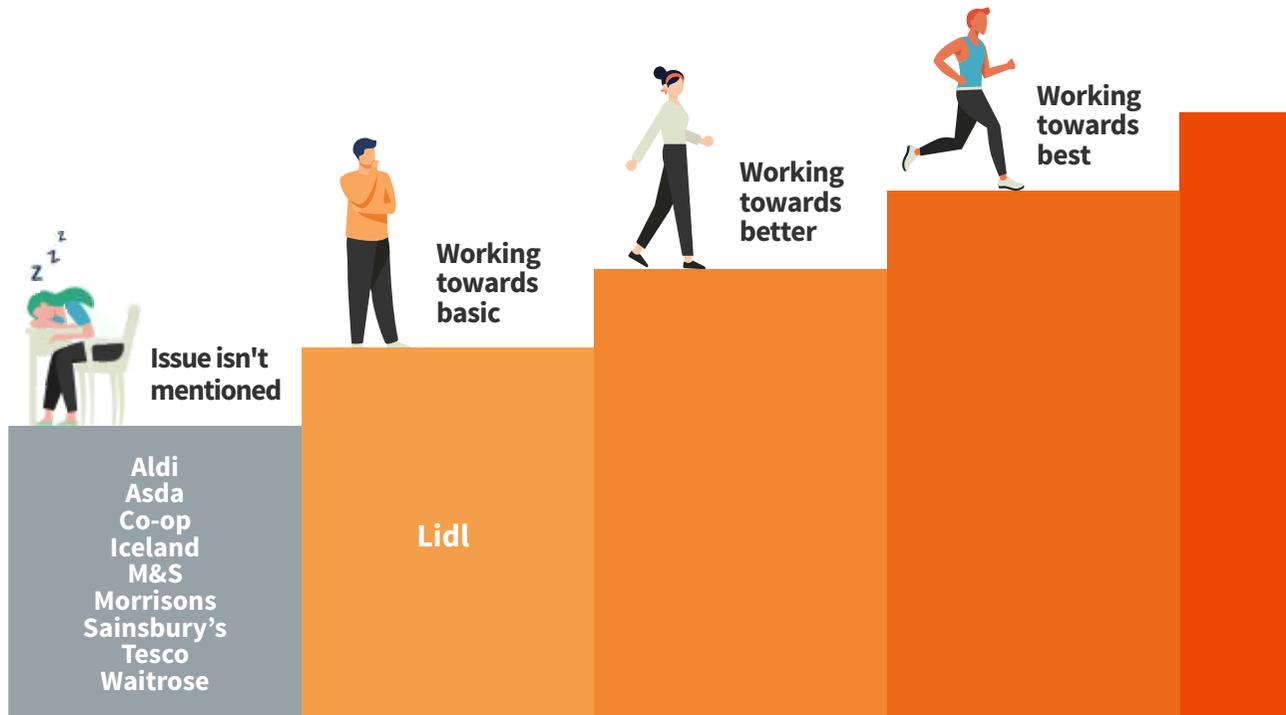
Retailers require producers to use integrated pest management

BEST means:

Retailers focus on low pesticide use in the production of feed and avoid pesticides with high toxicity



Protecting water sources



We found no effective policies to protect water sources

No retailer strategies explicitly seek to minimise their impact on water scarcity. No policies were found to tackle any of the indicators, although some retailers acknowledge the need for water risk and joint water catchment assessments in high-risk supply chains. Where there are standards in place, there is no transparency on the indicators used to assess progress. Leading retailers:

- Acknowledge the importance of fresh water in agriculture and have standards and controls to minimise the impact of their agricultural supply chain on water resources



BETTER means:

Retailers have a strategy in place to minimise water scarcity embedded in the supply chain and map whether their sourcing comes from areas with sustainable water management

BEST means:

Retailers report on the percentage of animal feed that comes from areas with sustainable water management, and favour pasture- or forage-based systems in catchments with sustainable water management



Using less water



BETTER means:

Retailers are taking steps to require producers to implement measures to reduce water use and protect water sources

BEST means:

Retailers support producers to reduce the use of mains or abstracted water

Most retailers lack a published strategy to reduce water use in their supply chain

No retailer has reported on water sourcing or the amount of mains or abstracted water used on-farm by producers. Where retailers mention their on-farm water management plans, no outline of indicators used is publicly available. Leading retailers:

- Report on the percentage of 'key suppliers with robust on-farm water management plans' from 2021

What should retailers do now?

01

Develop a plan to address each impact area

Set targets to address each area in line with the Sourcing Better framework.

02

Improve transparency

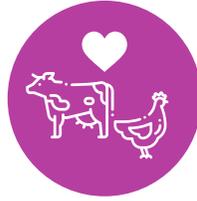
Developing effective indicators is a collective effort. Publish what indicators are being used and where efforts are being focused. Report progress against targets.

03

Rebalance the food basket

Commit to a targeted reduction in meat and dairy sales, and support people to eat healthier, more sustainable diets.

We ask retailers to report on



Good animal welfare

Percentage of their livestock supply chains that deliver 'higher welfare' standards, as set out by Global Animal Welfare Assurance or meet equivalent standards.



Responsible antibiotic use

Volume of antibiotics used in their supply chain by species and antibiotic family.



Raising fewer animals

Commitments to protein diversification and progressive reductions in livestock per area of land.



Improving on-farm GHG performance

Commitments to driving better GHG farm performance by requiring producers to use a carbon calculator tool.



No deforestation

Percentage of uncertified soy and palm kernel meal in the feed used in their supply chain, and the percentage of soy sourced from moratorium areas.



Less land for feed

Percentage of feed coming from alternatives to soy, grain and palm kernel.

We ask retailers to report on



Biodiversity of the farmed landscape

Commitments to support good biodiversity outcomes in and around farms, using indicators such as percentage of farmland devoted to wildlife, percentage of farmland covered by a biodiversity-friendly certification, or requirements for wild species/habitat monitoring.



Soil health

Soil health indicators, such as soil bulk density (the dry weight of soil per unit volume of soil, taking into account both solid matter and interparticular space) and soil organic matter (a carbon rich component of soil, consisting of plant and animal detritus at various stages of decomposition).



Reducing local pollution potential

Percentage of their producers that meet LEAF marque or equivalent standards, the origin of animal feed and the percentage of farms with tree cover.



Using less pesticides to grow food

Percentage of feed produced to LEAF Marque or equivalent standards, or organic.



Protecting water sources

Percentage of sourcing that comes from catchments with sustainable water management, according to regional indicators.



Using less water

Efforts to reduce freshwater use, including reporting on the percentage of producers that have water-use reduction targets and report on them.

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