



WHAT'S IN STORE FOR THE PLANET: THE IMPACT OF UK SHOPPING BASKETS ON CLIMATE & NATURE

DECEMBER 2025



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FOREWORD

During my five-year tenure as Chair of the Board at WWF-UK, I have had countless conversations with scientists about the scale of the environmental crises we face.

The reality is stark: tipping points are being surpassed that could push entire ecosystems to collapse, extreme weather events are becoming the norm, and wildlife populations are declining at an alarming rate. These shocks are already disrupting food supply chains and hitting businesses hard. If we want resilient supply chains we need to tackle these threats, not bury our heads in the sand. But no company can do this alone; collaboration across the entire system is essential.

In 2021, WWF launched the Retailers' Commitment for Nature – a bold pledge by five major UK retailers to halve the environmental impact of UK shopping baskets by 2030. Today, seven of the eleven largest retailers are on board. This was a moment of hope, built on the belief that collaboration – though difficult – is vital for systems change. It was also a clear acknowledgment that the future of the retail sector depends on a healthy planet.

Progress has been made but it is not at the pace or scale needed. Efforts must move from the margins to the mainstream, embedded into core business strategy. Short-term commercial wins cannot come at the expense of long-term resilience.

As the former CEO of Tesco, I understand first-hand the pressures: tight margins, commercial demands, and the need to keep shelves stocked. But environmental shocks – heat stress, flooding, soil degradation – are already threatening commercial viability. This is not just about the impact our food system has on the planet – it's about how it and we completely depend on nature.

Research shows companies exposed to biodiversity risk underperform compared to those less exposed. Yet, I find it alarming that commercial dependencies on nature are still absent from most company boardrooms. It's time boards acknowledge that shareholder value cannot exist without a healthy planet, and they have a fiscal responsibility to act.

This is about safeguarding the future of business—and our ability to feed customers in future.

Sir Dave Lewis

Chair of the Board of Trustees, WWF-UK





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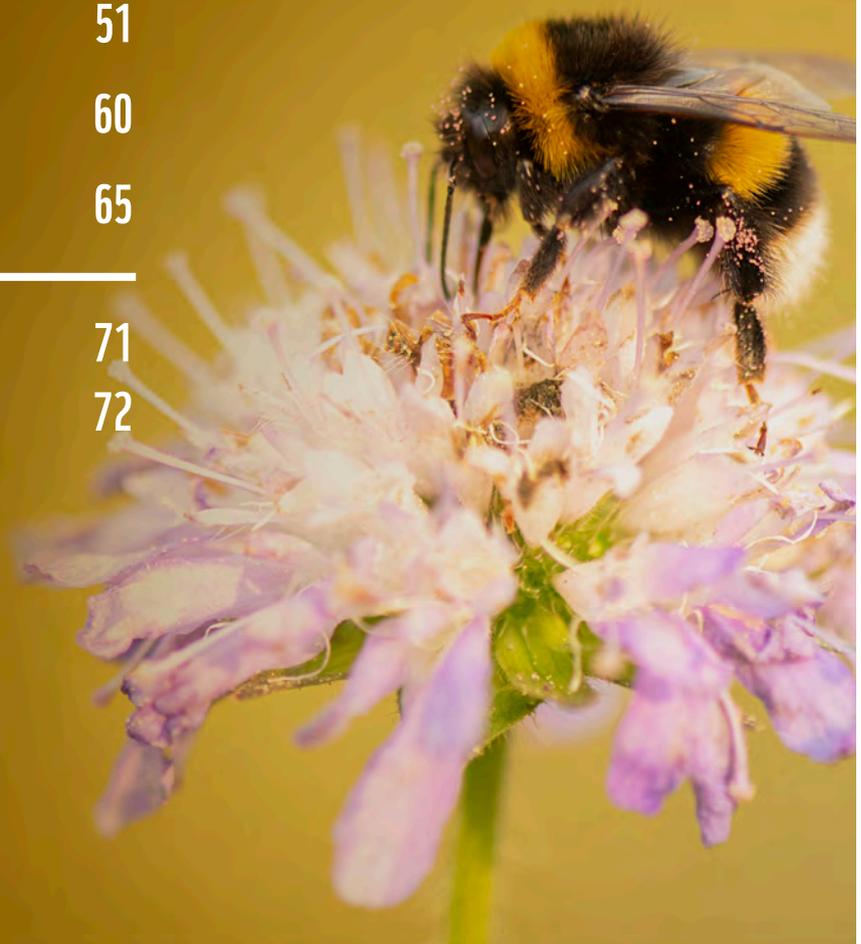
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INTRODUCTION

Each year, WWF's *What's in Store for the Planet* report provides an update on how UK retailers are progressing against the goals set in 2021 to halve the environmental impact of UK shopping baskets by 2030.

Retailers representing 90% of the UK grocery market submit unique data each year to WWF across a series of outcomes and measures related to the areas that have the most impact on climate, nature and people. Given that we get most of our food in the UK from supermarkets,¹ this report provides an insightful overview of what's going on in British food. It takes a systems-level perspective, going beyond individual company strategies and progress as it assesses the data of 10 retailers: Aldi, Asda, Co-op, Lidl GB, M&S, Morrisons, Ocado, Sainsbury's, Tesco and Waitrose.

The impacts of our food system on the planet are enormous. Globally, the production and distribution of food is responsible for 70% of nature loss, and around a third of global greenhouse gas (GHG) emissions – and yet, perversely, a third of the food we produce goes to waste.² The food system is broken. It is driving the destruction of precious habitats and deepening the climate crisis, putting our food security at risk. This year has seen the driest and hottest spring and summer in more than 100 years in the UK, which has had a drastic impact on yields of key commodities like wheat.³ We are seeing global supply chain disruptions due to drought and flooding for commodities like coffee and cocoa, driving up prices of these regular shopping basket items. We are seeing continued cost-of-living

pressures, with food price inflation exceeding 5%.⁴ Yet the consequences of climate change are often buried in reporting around food price inflation. As the frequency of extreme weather events increases, our soils continue to degrade, and water becomes ever more scarce – so too will the pressures on supply chains and consumer pockets keep growing.

While the food sector has made strides in the last decade to tackle its impact on the planet, we are not yet seeing an effort on a scale that will deliver systems-level change. Building a resilient food system is becoming ever more critical as structural shocks from climate volatility, geopolitical instability and supply disruptions intensify.⁵ A memo released earlier this year by a group of senior professionals working within some of the UK's biggest food retailers, producers and manufacturers highlighted that, despite facing a “threat to food security like none we have ever seen”, mitigation strategies within food businesses are “not commensurate with the level of the risk we are facing.”⁶ This is in part due to the highly competitive nature of UK food companies, a lack of supportive legislation and strategy across food, climate, and nature, a lack of collaboration across the sector, and a short-term mindset. While sustainability and cost are often pitted against each other, the consumer is already paying for inaction, as is the planet.

It is not too late to act. The next five years are what really count. Food systems resilience is about preventing as well as managing shocks. **It delivers food**





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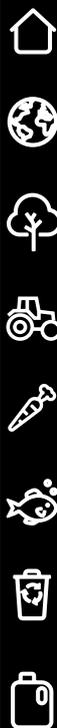
businesses and their supply chains a triple dividend: avoided losses, stimulated economic benefits, and wider social and environmental gains.⁷

Improved resilience also means a secure food supply and stable prices for consumers. Action taken now can pave the way for a healthy and sustainable future. Transparency and an assessment of risks, through processes such as the Taskforce on Nature-related Financial Disclosures (TNFD), can unlock commercial opportunities including improved efficiency, increased supply chain resilience, and greater market access. Many food businesses are already taking targeted action – such as investing in regenerative agriculture, water efficiency and circular technologies – while generating financial returns and competitive advantage.

But it is the balance of action that needs to change; we need to see a dramatic scaling of investment and action. Now is the moment to come together around these shared goals to ensure nutritional security and a healthy planet.

Often these stories of ‘why’ can get lost in the data, so our report takes a different approach this year. It brings the data to life through case studies of supply chain risks that have already been realised, as well as demonstrating how investment into nature-based solutions is already paying off.

As we are now almost halfway to the target deadline of 2030, this report should remind those responsible for driving change that there is a great deal to lose from inaction, but a great deal to gain by working to achieve these targets – doing so will deliver a sustainable, prosperous future. What was once a long-term threat has already arrived – and the time to act is now.



BASKET ITEMS ON THE BRINK

Climate change and nature loss may not be in people's minds when they are browsing supermarket aisles, yet both have direct and growing impacts on the price and availability of everyday food items. Common shopping basket items are some of the most vulnerable to price spikes and shortages caused by geopolitical events, unsustainable production practices, rising temperatures, drought and flooding.

While we operate within a global food system that has historically been able to buffer national supply disruptions, the recent price volatility of staple food items like coffee and chocolate remind us that the resilience of this system has limits. These shocks are amplified when multiple extreme weather events occur simultaneously, as is becoming more common: even well-established supply networks can collapse.⁸

Bread - Over one year's supply of bread has been lost in the last decade due to the effects of drought and heavy rainfall on wheat harvests.

Atlantic mackerel - Northeast Atlantic mackerel population is facing collapse, with fishing rates exceeding scientific advice by an average of 39% since 2010.

Milk - Climate change-induced heat stress and extreme weather reducing availability of forage can cause milk production losses in dairy cows.

Pork - With feed crop producing countries like Brazil facing increasing risk of droughts and water stress, costs could push UK pork prices up by £59m by 2050.

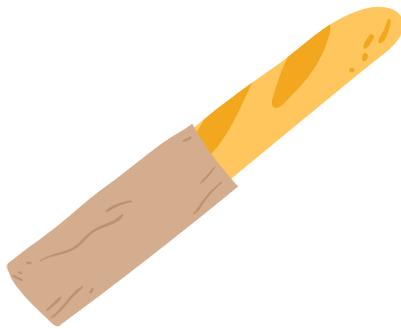
Bananas - Climate change is fuelling the spread of two devastating fungal diseases, slashing banana yields and export volumes by almost a quarter in countries like Costa Rica.

Coffee - World coffee prices increased by ~40% in 2024 due to extreme weather. Rising temperatures projected to reduce the area suitable for coffee growing by 50% by 2050.

Chocolate - Excessive heat and shifting rainfall patterns caused cocoa prices to surge 136% between 2022-2024. Key cocoa growing regions are set to become unsuitable for production.

Cauliflower - As one of the vegetables hit hardest by the 2025 UK drought, prices increased from 89p/kg to £2.14/kg in August 2025 alone.





BREAD

Britain has lost the equivalent of more than a year's supply of bread this decade as extreme weather takes its toll on wheat harvests. Record-low harvests over the past ten years are putting the UK's wheat self-sufficiency at risk, while costing British farmers billions in lost income as millers turn to imported wheat instead.⁹



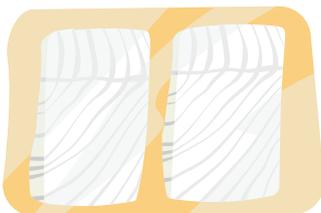
COFFEE

World coffee prices reached a multi-year high in 2024, increasing by almost 40% compared to the previous year's average, due to extreme weather. Arabica beans, a UK favourite, experienced a staggering 91% price hike in the past year.¹⁰ With rising temperatures projected to reduce the area suitable for coffee growing by half by 2050,¹¹ coffee may gradually become a luxury product.



CHOCOLATE

Cocoa production is highly concentrated in Côte d'Ivoire and Ghana, both of which are severely impacted by climate change. Excessive heat, shifting rainfall patterns and the increased spread of fungal infections and pests due to warmer weather caused cocoa prices to surge 136% between July 2022 and February 2024.¹² Up to half of Côte d'Ivoire's cocoa regions are set to become unsuitable for production, meaning that cocoa is likely to become less accessible, or potentially drive deforestation elsewhere to open up new production areas.¹³



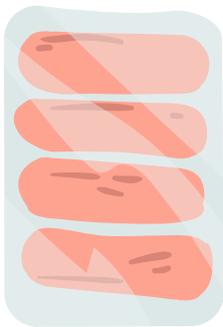
ATLANTIC MACKEREL

Catch levels of the Northeast Atlantic mackerel stock have continued to exceed scientific advice by an average of 39% since 2010,¹⁴ and the population now risks total collapse. If this overfishing continues, mackerel will become much more costly, and much less commonplace on our shelves.



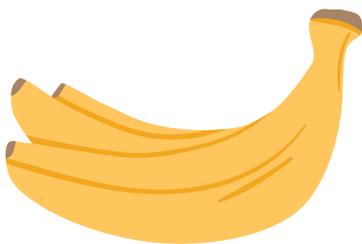
MILK

The UK dairy sector is highly sensitive to weather conditions. As climate change is causing wetter winters, cows are turned out to pasture later, and dryer summers are reducing forage yields. Less available forage can lead to lower milk production, so many farmers are having to buy costly feed, such as soy – putting greater pressure on forests in Brazil.¹⁵ Additionally, studies suggest that climate change-induced heat stress can cause significant milk production losses in dairy cows in the UK.¹⁶



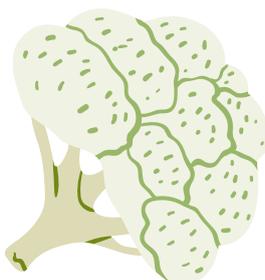
PORK

The biggest input cost for pig producers is feed, which is usually made from wheat and soy. When feed crops are affected by extreme weather events, UK consumers will feel this in their pockets.¹⁷ Recent analysis by IGD (Institute of Grocery Distribution) suggests that beef and pork will see the greatest price impacts driven by changes in feed prices, with the overall additional cost projected to be £59 million by 2050.¹⁸ Pork prices have already been volatile in recent years, partially driven by disease outbreaks like African swine fever which are likely to get more frequent in a warming climate.¹⁹



BANANAS

Bananas, one of the most widely consumed fruits in the UK, are under threat. Climate change is fuelling the spread of two devastating fungal diseases. These pathogens are slashing banana yields and export volumes – Costa Rica alone saw a 20-23% drop in exports due to Sigatoka in 2025. Without significant investment in adaptation to climate change, such breeding heat-tolerant banana varieties, the future of export banana production is uncertain.²⁰



CAULIFLOWER

Wholesale prices for cauliflower, one of the vegetables hit hardest by the drought this summer, increased from 89p per kilo at the beginning of August 2025 to £2.14 by the middle of the same month. This shows how significantly extreme weather can affect consumer prices even within short spans of time.²¹

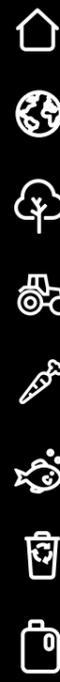


PROGRESS TO DATE TOWARDS 2030 TARGET

This figure gives a snapshot of the progress made towards each Outcome within the WWF Basket. It shows the aggregate figures across each Measure, showing the level of progress and distance to go for the retailers who have provided data.



2030 TARGET



WHAT THE DATA REVEALS

DATA QUALITY:

- **Aldi, Co-op** and **Waitrose** increased the proportion of data provided this year, while **M&S** are still leading the way in data provision.
- There has been a **notable decrease** in the number of retailers reporting on their protein food sales split.
- **More retailers reported** on cocoa and beef sourcing that is deforestation and conversion free (DCF), sales of pre-prepared and composite products, sales across the main Eatwell food groups, and wild-caught seafood adhering to all aspects of the Seafood Jurisdictional Initiative (SJI).
- Certain metrics have seen **improved data quality** with enhanced coverage across the retailers for sustainable water management, Scope 3 emissions, and fish feed dependency ratio (FFDR).
- There are **still no retailers reporting** on farm-level food waste or on the proportion of their packaging that meets WRAP's Best Practice Labelling Guidelines, highlighting the need for increased transparency and traceability mechanisms.

PROGRESS/ BUILDING RESILIENCE:

- Reporting retailers have achieved the target for robust schemes for biodiversity and soil health for fruit and vegetables sourced in the UK; however, **five out of the ten did not provide data**.
- Retailers are **making good progress** on Scope 1 and 2 emissions reductions (12% closer to target compared to last year), DCF sourcing of palm oil (10% increase from last year), and composite product sales (two new reporting retailers contributing to a greater proportion of vegan and vegetarian meals).
- Two retailers, **Aldi** and **Waitrose**, have invested in improved environmental and social outcomes attached to a portion of their own-label cocoa sourcing – but without wider sectoral ambition this has only resulted in a 2.8% increase in the average retailer performance for DCF sourcing.
- **Most retailers** are prioritising certification as a vehicle for driving sustainability outcomes across cocoa, seafood, livestock, and fruit and vegetables. However, certification schemes alone are not robust or ambitious enough to deliver transformation.
- **Regulation is a key driver for change**, with packaging recyclability at high levels across all retailers; this positive shift is incentivised by the packaging extended producer responsibility regulations.



! OFF TRACK/RISKS:

- **Retailers are set to miss 2025 DCF targets**, with 2024 data revealing only 1.8% of soy and 3.1% of cocoa being sourced as DCF from high-risk regions. Missing these targets will severely hinder their ability to deliver on climate targets.
- **Retailers are not tackling protein diversification**: they are still selling twice the target proportion of livestock protein compatible with a healthy sustainable diet, and only one retailer – Lidl GB – has public targets for sales.
- There has been **limited progress and engagement** for 'better' sourcing of meat, dairy and eggs. Retailers must scale up their sustainable sourcing policies beyond select farming groups.
- **Most retailers are a long way off** on reducing Scope 3 emissions. It will not be possible to hit targets without tackling emissions associated with agriculture, diets, food waste and deforestation. Collective action on these areas is the only way to expedite progress.
- On the sustainable sourcing of packaging materials, while there has been an improvement in reporting this year, **there is significant work needed** for retailers to maximise their use of recycled content and sustainable sources of packaging. Currently, just 42% of own-label primary packaging meets the WWF Basket requirements.

RETAILER	% WWF BASKET REPORTED 2025	% WWF BASKET REPORTED 2024**
M&S*	81% ▲	80%
Waitrose*	75% ▲	69%
Lidl GB*	69% ▲	65%
Tesco*	69% ▼	73%
Co-op*	65% ▲	47%
Aldi*	61% ▲	50%
Sainsbury's*	58% ▲	53%
Ocado Retail	41% ▼	63%
Morrisons	31% ▼	40%
Asda	20% ▼	21%
Iceland	0% –	0%

* WWF's Retailers' Commitment for Nature signatories at the time of data collection.

** 2024 figures are lower than previously reported as last year's data included an external survey of WRAP's best labelling practice, which could not be replicated. For consistency and to aid comparability, we have adjusted last years' figures.





CLIMATE





WHY FOCUS ON CLIMATE?

Our food system faces unprecedented risks in the face of climate change. In the UK, if we continue with business as usual and global temperature rise exceeds 1.5°C, our food system will see significant shocks. A recent IGD report suggests that global climate inaction would mean the total UK food supply faces an extra £2.6 billion of costs each year by 2050.²² Furthermore, given that we source nearly half of our food from overseas,²³ climatic impacts across the globe also impact our nutritional security at home. The Mediterranean, where we get much of our fruit and vegetables from, is expected to see an increase in temperature of 2-3°C by 2050, with water availability reducing by up to 15% for every 2 degrees of warming.²⁴ In April 2023, a total of 60% of Spain’s agricultural land was under drought, and 3.5 million hectares of crops had been destroyed. Beyond Europe, we are already seeing price rises due to drought conditions impacting the yields of commodities including rice, coffee and sugar.

With food price inflation proving persistent in the UK, there is a need for the sector to both mitigate its climate impact and reduce its exposure to climate-related supply chain shocks. However, we know

that using GHG emissions as the only metric of success will lead our food system down the wrong path and create perverse incentives that prioritise efficiency over all else. A more holistic picture is needed, judged not only by emissions cuts but also against metrics that promote cleaner waterways, healthier soils and landscapes that are resilient to floods and droughts. By investing in nature-positive farming that supports biodiversity in the UK and abroad, we can reduce reliance on price-volatile artificial inputs like feed, fertiliser, pesticides and herbicides; build soil health; achieve GHG emissions reductions; and create more adaptable, resilient supply chains.

THE SECTOR MUST BOTH MITIGATE ITS CLIMATE IMPACT AND REDUCE EXPOSURE TO CLIMATE-RELATED SHOCKS

2030 OUTCOME	RETAILER PROGRESS MEASURE
Achieved GHG reductions across all scopes in line with 1.5°C science-based targets (SBT)	% reduction of GHG emissions across Scope 1 & 2 activities (non-FLAG)
	% reduction of GHG emissions across Scope 3 activities (non-FLAG)
	% of purchased goods and services emissions covered by suppliers with SBTs



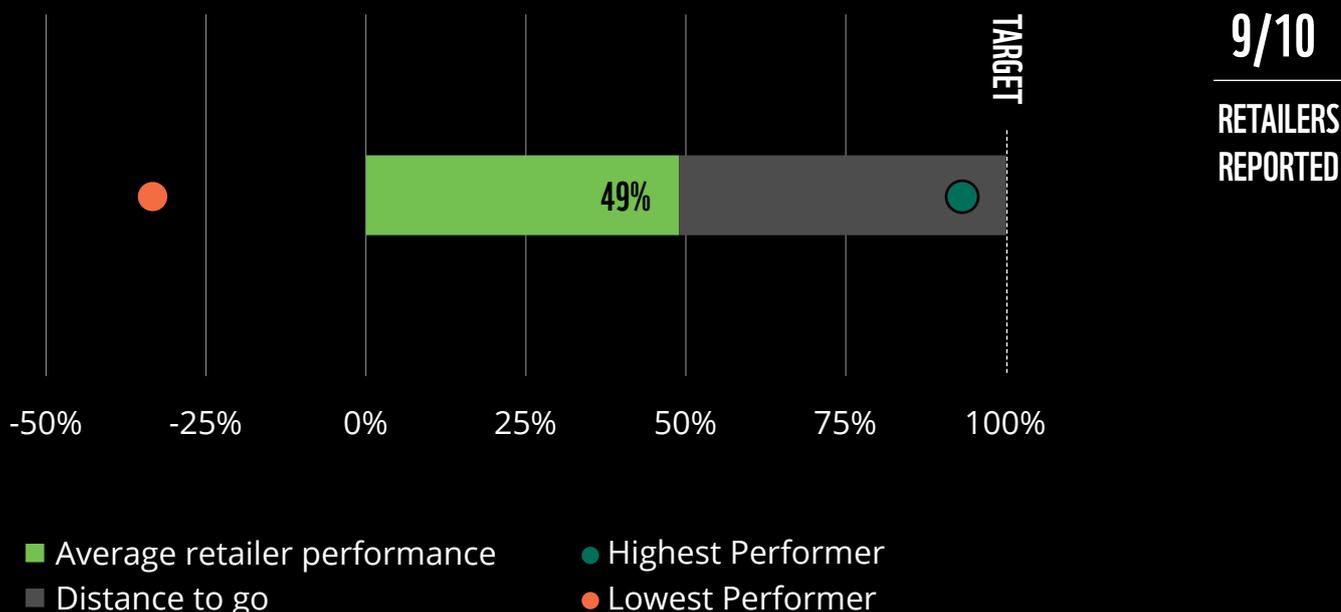
% PROGRESS TOWARDS ACHIEVING NEAR-TERM SCOPE 1 & 2 SBTS

The energy crisis of 2022 highlighted the importance of taking action to reduce direct operational emissions, with fossil fuel price instability causing the operating costs of food retailers to increase dramatically. In addition, food retail is highly energy-intensive, which further underpins the need to transition away from fossil fuels.

It is therefore welcome to see evidence of progress across the reporting retailers on this measure. On average, retailers are 49% of the way towards achieving their near-term Scope 1 and 2 targets, compared to 37% last year. We have seen

announcements from various retailers on procuring renewable electricity via power purchase agreements, investing in low-carbon fleets, and decarbonising the heating and refrigeration in stores.^{25,26,27} Barring one retailer who has increased their scope 1 & 2 emissions, retailers as a whole are making good progress in decarbonising their operations; however, the remaining emissions will be challenging to tackle, and efforts to do so must be backed by investment if the 2030 targets are to be met.

% PROGRESS TOWARDS ACHIEVING NEAR-TERM SCOPE 1 & 2 SBTS



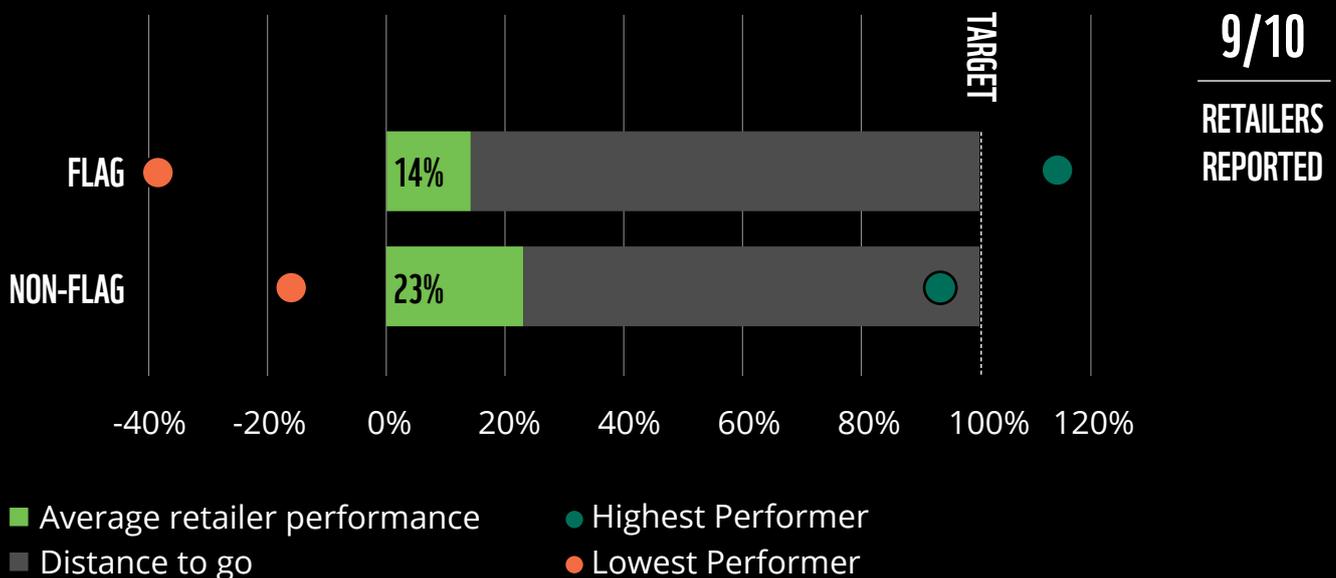


% PROGRESS TOWARDS ACHIEVING NEAR-TERM SCOPE 3 SBT

UK food companies are facing unprecedented threats to their supply chains. As evidenced by the investor memo released earlier this year,²⁸ key crops are already suffering major shortages due to droughts, flooding and soil degradation, all linked to climate change. It is imperative that retailers, in addition to making their supply chains more resilient to these impacts, work along their supply chains to mitigate the emissions associated with the products they sell. Over 90% of retailers' emissions are Scope 3 – emissions generated across the value chain, such as in agricultural production – which in complex agri-food supply chains are impossible to address without cross-value-chain collaboration. Data and transparency on Scope 3 emissions is critical; disclosing this information is increasingly important for mobilising financial capital, to adhere to government regulations, and to be able to make credible sustainability claims.²⁹

It is encouraging to see that Scope 3 accounting is becoming standardised in comparison to previous years, with all retailers able to evidence the level of progress being made against a science-based target, and all but one of them having set targets to specifically address their forestry, land-use and agricultural (FLAG) emissions. Retailers have progressed by an average of 14% toward their near-term FLAG targets, up from 11% last year. For non-FLAG emissions, retailers are on average 23% towards achieving their targets, compared to an average increase in emissions last year. However, wide performance variation and limited data quality mean these changes may actually reflect sales shifts between retailers or changes in improved emission factor accuracy, rather than real supply chain decarbonisation.

% PROGRESS TOWARDS ACHIEVING NEAR-TERM SCOPE 3 SBT



While GHG accounting improves going forwards, if retailers are to have any chance of meeting climate targets it is imperative they meet their deforestation and conversion commitments, transition to more nature-friendly models of production, as well as reducing demand-side emissions and shifting the balance of animal-based protein sales. These actions offer retailers an opportunity to make their supply chains more resilient to the impacts of climate change, while also mitigating their Scope 3 emissions. This must however be accompanied by sufficient long-term investment and collaboration between businesses, such that producers are able to transition and consumers are empowered to make sustainable choices.

**THESE ACTIONS OFFER
AN OPPORTUNITY
TO MAKE THEIR SUPPLY
CHAINS MORE RESILIENT
TO THE IMPACTS OF
CLIMATE CHANGE**





BUILDING RESILIENCE - EXCHANGE MARKET

Exchange Market is a new initiative developed to financially reward arable farmers who transition to lower-carbon farming methods, and to share the costs of this between various downstream companies. It operates as an insetting fund and pays farmers directly to reduce emissions without the sale of carbon credits. Exchange Market has received over £1 million of funding from Tesco, Lidl GB and Co-op, among other organisations.

The initiative aims to incentivise sustainable practices by providing farmers with up to £60 for each tonne of carbon they reduce from their emissions each year (in comparison to a baseline). When joining the scheme, farmers are given specialist guidance to develop a strategy for reducing emissions. They are then paid an initial fee based

on the estimated reductions they can achieve, after which they are expected to implement these actions. At the end of the year, the farmers conduct an updated GHG assessment, after which they are paid the remaining amount depending on the level by which they have reduced their emissions.

Arable supply chains have been particularly impacted in recent years by cycles of flooding and droughts hitting harvests. Farmers must be supported to make their land more resilient to these climatic events. It is encouraging to see initiatives like Exchange Market developing cross-sector funding mechanisms that tackle the challenges associated with complex supply chains, where a lack of traceability can be a barrier to action.





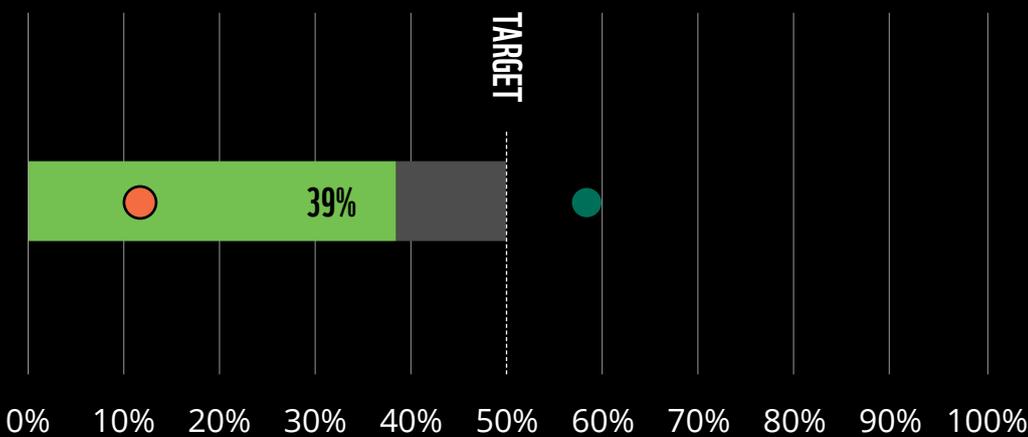
% OF PURCHASED GOODS AND SERVICES EMISSIONS SOURCED FROM SUPPLIERS WITH 1.5°C-ALIGNED SBTs

If retailers are to meet their climate targets, engaging with suppliers is crucial. Alongside retailers, suppliers should also be setting emissions reduction targets: retailers within WWF's Retailers' Commitment for Nature have agreed that suppliers representing 50% of their purchased goods and services emissions would set 1.5°C-aligned SBTs.

In this year's data, the average coverage reported was 39%, similar to last year. The reported figures ranged between 11% and 58%; however, there are differences in how retailers have defined suppliers

with 1.5°C-aligned SBTs. Those retailers that have reported the lowest proportion have specified that only suppliers with 1.5°C-aligned net-zero SBTs (both near- and long-term targets, across Scopes 1, 2, and 3) are contributing to the figure, while not all other retailers have the granularity within their data systems to be able to make this distinction. In future years we hope to see more retailers reporting, and more consistent reporting across the retailers.

% OF PURCHASED GOODS AND SERVICES EMISSIONS SOURCED FROM SUPPLIERS WITH 1.5°C-ALIGNED SBTs



5/10

RETAILERS REPORTED

- Average retailer performance
- Distance to go
- Highest Performer
- Lowest Performer



KEY ACTIONS

2025 MILESTONE

Nature-positive climate transition plans should be developed to provide a clear pathway to net zero by 2050, incorporating the near-term 2030 targets of the WWF Basket.

2025 MILESTONE

Systems to capture and access accurate and comprehensive Scope 3 emissions data are in place.

2026 MILESTONE

Increase uptake of SBTs within supply chains.

See [WWF's Blueprint for Action](#) for further details.





DEFORESTATION AND CONVERSION





WHY FOCUS ON DEFORESTATION AND CONVERSION?

More than 1.6 billion people depend on forests for food or fuel, and some 70 million people worldwide – including many Indigenous communities – call forests home.³⁰ Global demand for soy, palm oil, beef and cocoa is driving large-scale deforestation and habitat conversion across Southeast Asia, West Africa and South America. These ecosystems provide benefits that are impossible to fully quantify, from managing local temperatures and rainfall³¹ to stabilising against global climatic shifts,³² from providing sources of food, clean water, soil stability and medicines to abating the spread of pests³³ and zoonotic diseases.³⁴ When forests are lost, entire ecosystems collapse – threatening iconic wildlife, accelerating climate change, and undermining global supply chain resilience.

Over the last two decades, there has been a growing international focus from the private sector on protecting the remaining natural ecosystems from further agricultural expansion.³⁵ UK retailers have long recognised the increasing risks of

ongoing deforestation, to their businesses and their ability to stock shelves, which is why they set targets to achieve 100% DCF supply chains by the end of 2025.³⁶

This report shares 2024 data, meaning it does not formally reveal if retailers have achieved these goals until next year. However, one year out, the data speaks for itself. Without systems transformation – including a shift to reduce animal-based food consumption and reduce pressures on and demand for natural resources – these goals are not attainable. While retailers have a responsibility to deliver against these targets, other actors in the system also need to transform their approach, with transparency and commitment on the part of traders just as critical as they are among consumer-facing food companies. Recent years have made it clear that supply chains will not radically shift without government intervention, yet there are continued delays to critical legislation such as the EU's Deforestation Regulation and the UK Forest Risk Commodity legislation.

2030 OUTCOME	RETAILER PROGRESS MEASURE
100% deforestation and conversion-free agricultural commodity supply chains by 2025, with a cut-off date of 2020 at the latest	% of conversion-risk commodity in own supply chain that is verified deforestation and conversion-free
Require first importers to have deforestation and conversion-free supply chains by 2025, with a cut-off date of 2020 at the latest	% of conversion-risk commodity sourced from importers that have robust commitments and action plans to handle only deforestation and conversion-free material, across their entire operations, with a cut-off date no later than 2020



PALM OIL

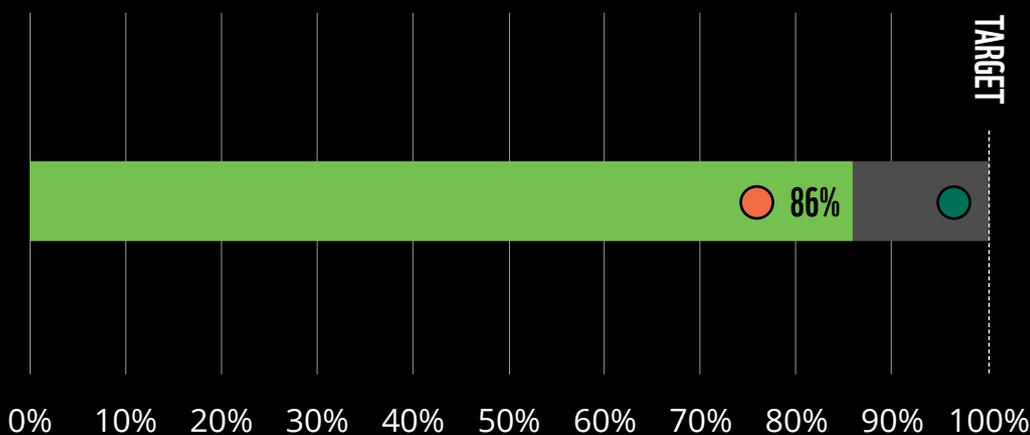
While palm oil is a highly efficient crop with a wide range of uses in products from food to cosmetics, unsustainable palm oil production is driving the loss of natural habitats. Conversion of land for palm plantations has already increased land surface temperatures by over 1°C in Sumatra,³⁷ while wider climate impacts are expected to make palm production less resilient in the coming years.³⁸ Increasing global demand for palm oil is also threatening further destruction in some of the world's largest remaining virgin forests, such as in Papua New Guinea, and the communities that live near them.

However, thanks to industry efforts over the last decade, palm oil can be seen as somewhat of a success story. With coordinated global efforts and industry support for responsible palm oil production, initiatives like the Roundtable on Sustainable Palm Oil (RSPO) have resulted in greater resilience within

production regions, supporting rural poverty alleviation and sustainable development. With greater investment in key sourcing regions to incentivise responsible, nature-friendly production, and stability for smallholders and landowners, supply chains can be better protected from climatic and economic shocks.

Retailers have clearly invested in achieving these targets, with 84% of their own-label palm oil, on average, being DCF, an increase of 10% from last year. The results include significant improvement from one retailer with a 22% jump, and three retailers reporting DCF volumes of over 90%. Additionally, Co-op,³⁹ M&S,⁴⁰ Sainsbury's⁴¹ and Waitrose⁴² have delivered financial support for sustainable smallholder production and forest communities, including in West Kalimantan, Sabah and Sarawak.

% OF PALM OIL SOURCING THAT IS VERIFIED DEFORESTATION AND CONVERSION-FREE, OF LOWER RISK ORIGIN, OR UNVERIFIED



9/10

RETAILERS REPORTED

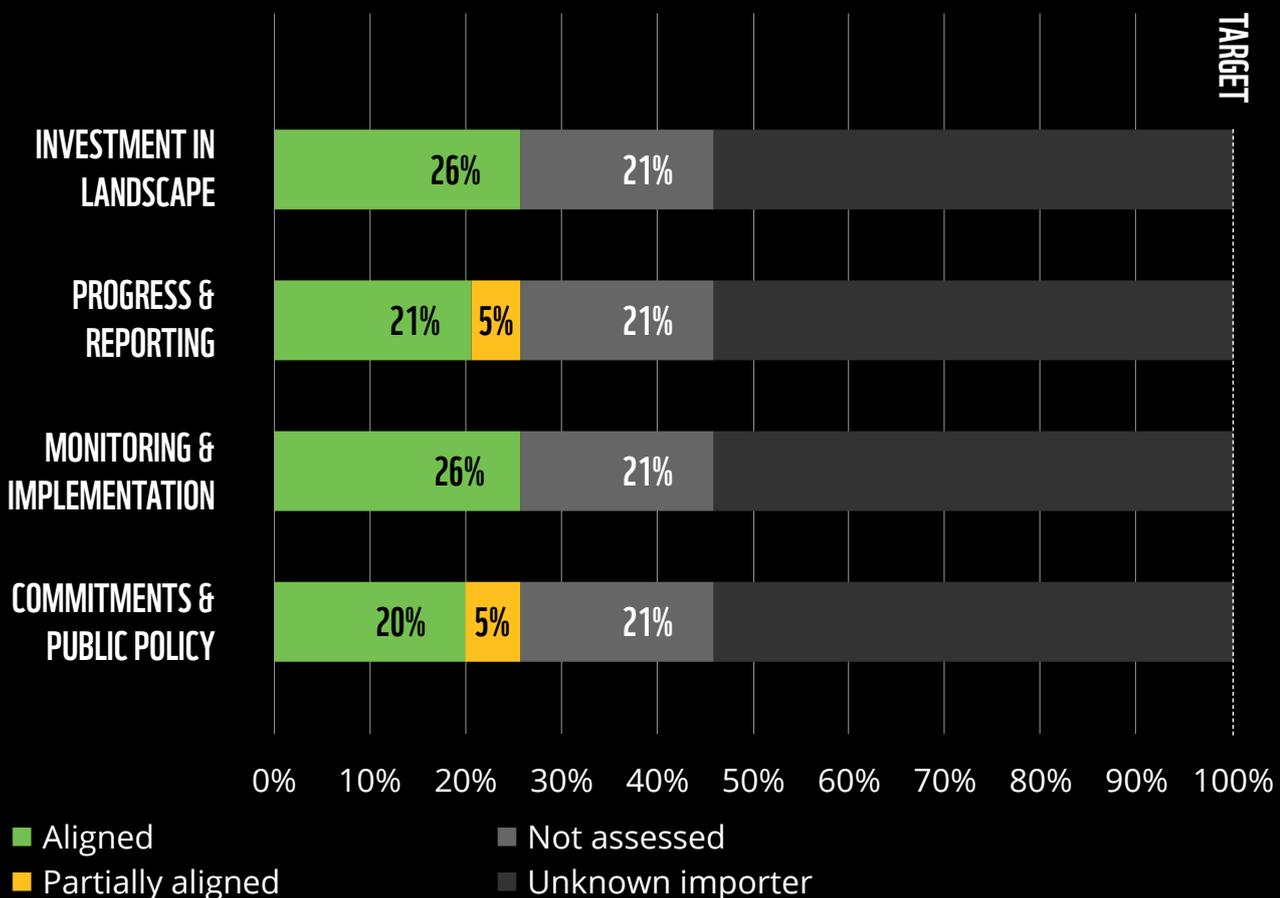
- Average verified DCF
- Average unverified
- Highest Performer
- Lowest Performer

However, there remains a stubborn 16% of palm oil which is still not physically monitored as being DCF. While palm oil used in foods for direct human consumption makes up the largest share of the retail footprint, palm oil found in cosmetics, household products and animal feed is more challenging to tackle with small volumes of material being mixed in highly complex supply chains.

Data from reporting retailers shows that the share of their palm oil volumes linked to known importers has decreased by over 20% compared to last year's reporting. This suggests that transparency on palm

has been deprioritised. Meanwhile, WWF's assessment of key exporting traders indicates that they are continuing to make progress on DCF commitments and action plans. However, due to the gap in supplier reporting, less than 50% of the retailers' palm footprint is known to be handled by suppliers with robust DCF monitoring and implementation plans. Further details can be found in the [WWF 2025 traders' assessment](#).

% OF PALM OIL SOURCING FROM 1ST IMPORTERS WITH ROBUST COMMITMENTS & IMPLEMENTATION PLANS





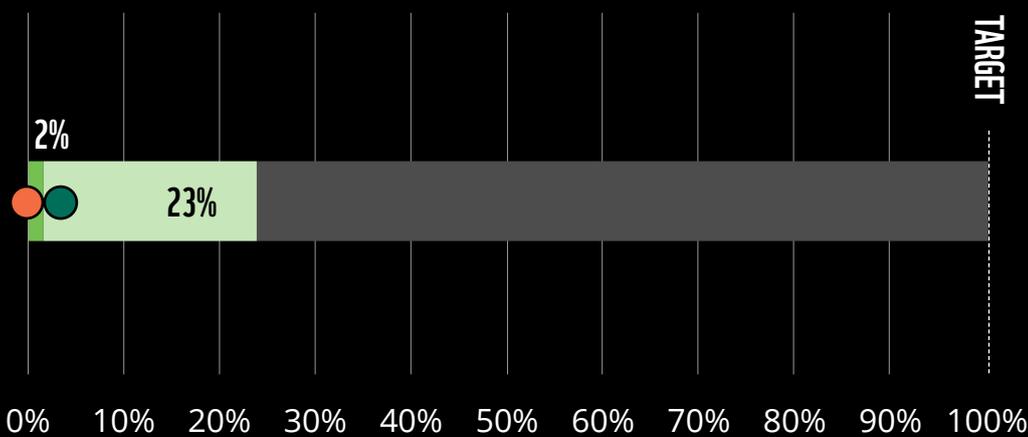
SOY

The expansion of soy production – largely for use in animal feed – has led to vast amounts of deforestation and destruction of natural habitats in key producing regions, including the Cerrado in Brazil. The Cerrado region has experienced shifts in weather patterns since the 1970s due to the degradation of the native ecosystem, with the current levels of drought unprecedented in more than 700 years of recorded history. As a result, the region is already experiencing declines in productivity, with increased heating and reduced rainfall recycling leading to regional water stress. Losses in productivity will reach an estimated 6-20% by 2050.⁴³

Despite the urgency of the situation, there is still a long way to go to achieve 100% DCF supply. Volumes from high-risk

regions that can be physically certified as DCF, largely in South America, remain at an average of just 2%. The data also reveals that retailers are increasing transparency on the volumes of soy sourced from lower-risk regions such as the USA, which is up 13% from last year. This trend of shifting sourcing regions is in part due to major soy importers attempting to meet UK and EU market and regulatory demand for DCF soy without increasing farm-level traceability in high-risk regions. Divesting select supply chains from high-risk regions will have little impact in tackling global deforestation, as it removes the incentive to transition high-risk production landscapes. WWF urges retailers to prioritise improving traceability systems and supporting the transition to sustainable production in higher-risk regions.

% OF SOY SOURCING THAT IS VERIFIED DEFORESTATION AND CONVERSION-FREE, OF LOWER RISK ORIGIN, OR UNVERIFIED

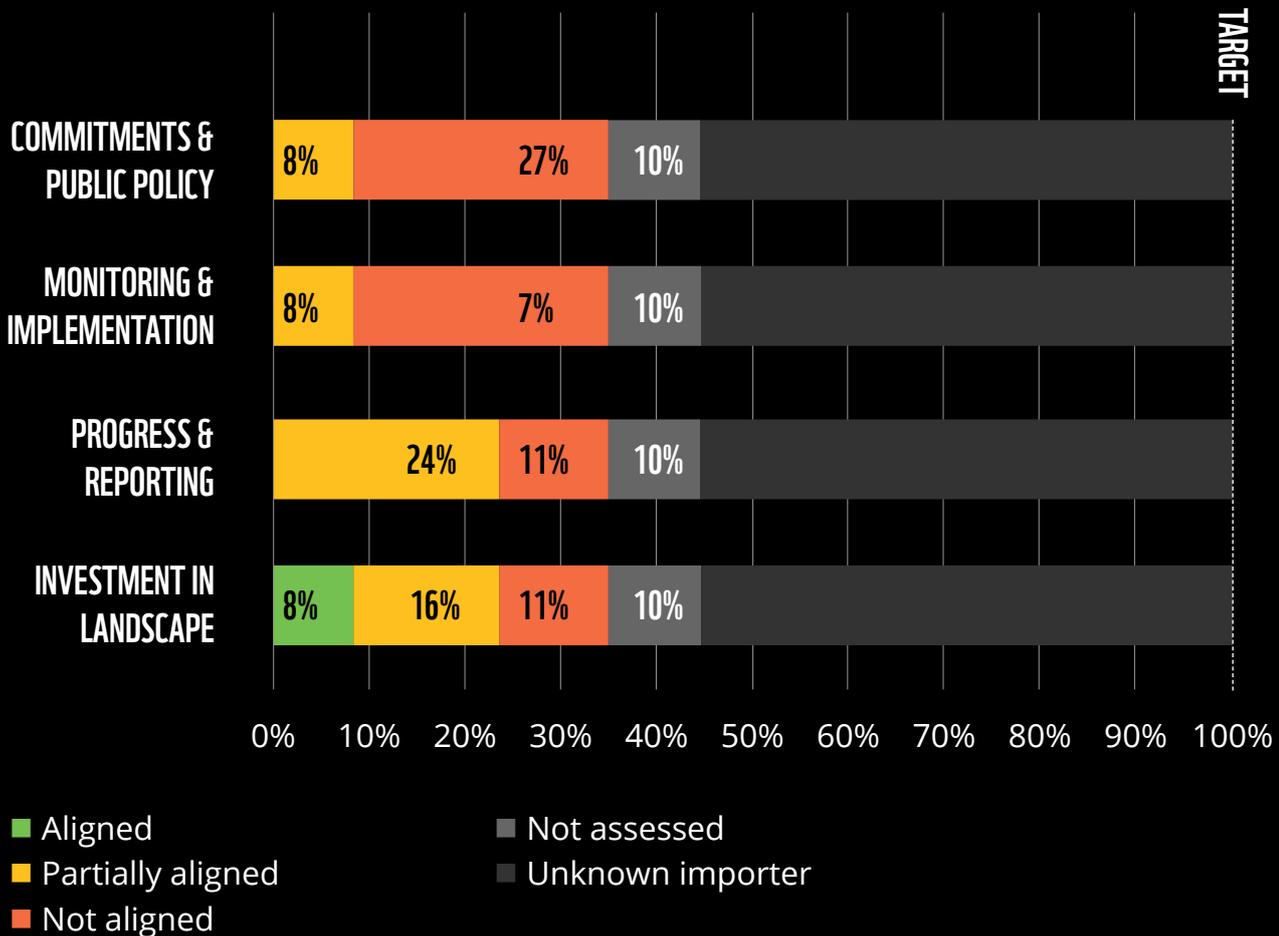


- Verified DCF
- Lower Risk Origin
- Unverified
- Highest Performer
- Lowest Performer

10/10

RETAILERS REPORTED

% OF SOY SOURCING FROM 1ST IMPORTERS WITH ROBUST COMMITMENTS & IMPLEMENTATION PLANS



In July of this year, retailers, along with other major food companies, released a statement admitting that the goal of ending deforestation and conversion linked to soy production will not be met by the end of 2025.⁴⁴ To see how plans are stacking up against commitments, WWF published a [Soy Scorecard](#) assessing retailer strategies, in which Sainsbury's and Waitrose demonstrated sectoral leadership, with Asda and Iceland lagging behind.

The proportion of soy that comes from known importers remains very low: over 50% cannot be attributed to any importer, highlighting a huge black box in risk exposure. Where the exporting

trader is known, WWF's assessment this year indicates some improvements in monitoring and implementation plans. A tiny fraction of the overall supply (less than 1% of known volumes) is sourced via a Brazilian trader with sufficient scores on Progress, Reporting and Investment to qualify them as a DCF supplier. There are still multiple gaps in Commitments, Monitoring and Implementation by known UK importers which will need to be addressed in order for retailers to achieve DCF supply chains. Further details can be found in the [WWF 2025 traders' assessment](#).



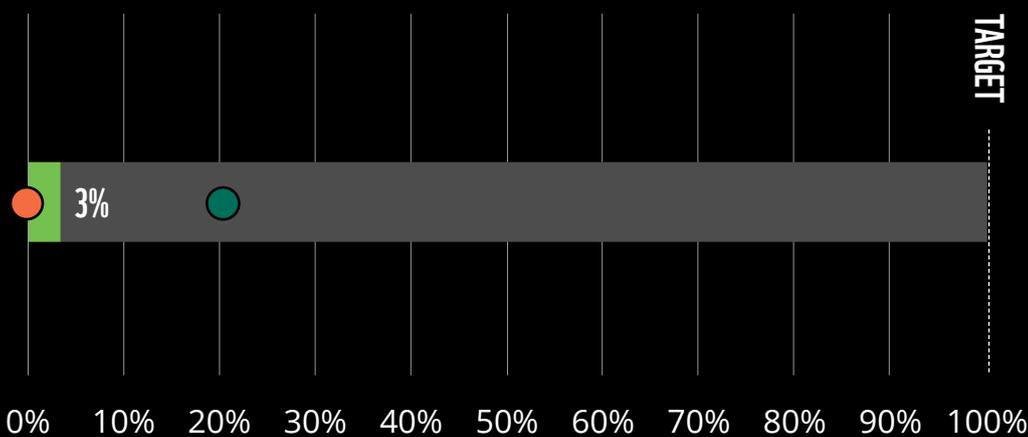
COCOA

Climate change is already disrupting cocoa supply chains, exposing vulnerabilities and driving up chocolate prices, highlighting the urgent need for more resilient sourcing strategies. The price of cocoa has surged due to reduced yields following devastating droughts in Ghana and Côte d'Ivoire, which together produce over 50% of the world's cocoa.⁴⁵ These impacts, alongside increasing demand, have driven further deforestation in Congo, Liberia and Nigeria.⁴⁶ In response, instead of reducing risks and investing further into DCF production, some confectionary companies have already lowered the cocoa content of their products in response to price hikes,⁴⁷ a trend that could have knock-on effects on cocoa farmers' livelihoods. By adopting nature-positive farming techniques, the cocoa sector can build resilience against and reduce the intensity of these shocks, increasing production and safeguarding farmers' livelihoods.

Data this year shows that two retailers are taking action to address their cocoa footprint, with average physical DCF volumes increasing from 0.3% to over 3%. The bulk of the increase is due to Waitrose and Aldi employing Tony's Open Chain model for a portion of their own-label chocolate – a positive step in prioritising human rights and environmental protection within cocoa production.

For the first time, WWF requested known proportions of cocoa certified under a mass balance scheme, recognising that to date this has been the main approach for responsible sourcing of cocoa. On average, 70% of cocoa volumes are covered under Fairtrade or Rainforest Alliance mass balance certification; however, the difference between the highest and lowest performer is stark – while Co-op leads at 100%⁴⁸ sourced on Fairtrade certified terms, one retailer scores 0%. High coverage of mass balance

% OF COCOA SOURCING THAT IS VERIFIED DEFORESTATION AND CONVERSION-FREE, OF LOWER RISK ORIGIN, OR UNVERIFIED



7/10

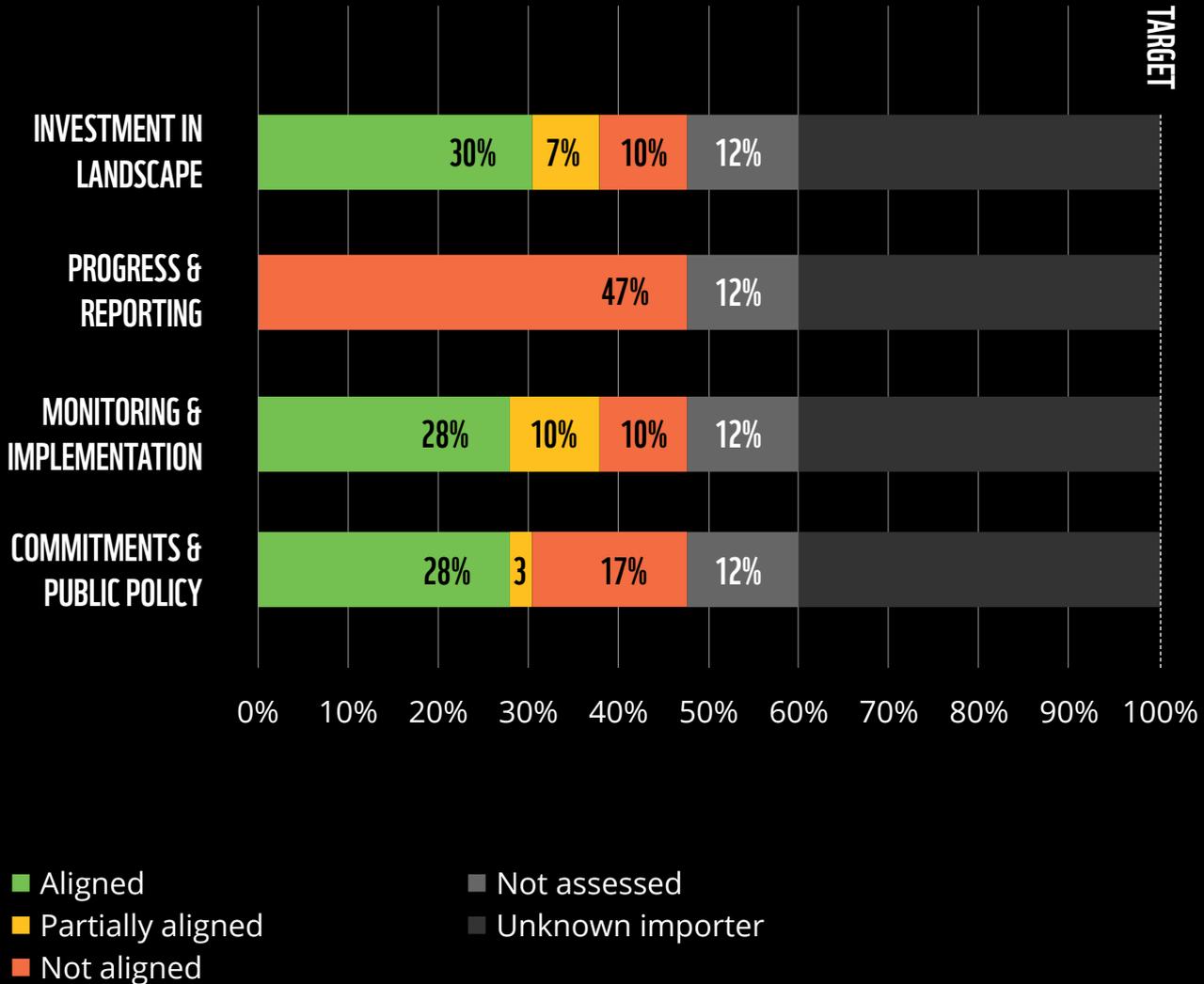
RETAILERS REPORTED

- Verified DCF
- Unverified
- Highest Performer
- Lower Risk Origin
- Lowest Performer





% OF COCOA SOURCING FROM 1ST IMPORTERS WITH ROBUST COMMITMENTS & IMPLEMENTATION PLANS



certified materials demonstrates demand for responsible farming and support for human rights, but it cannot assure that the cocoa volumes are not driving deforestation or habitat conversion.

The average proportion of cocoa coming from a known importer has decreased in comparison to last year. A significant proportion of the known supply (38%) is coming from a trader with an aligned

DCF commitment, monitoring and implementation plan, while approximately 36% was sourced from importers lacking DCF commitments or robust action plans. This year's assessment found that the cocoa sector is lagging behind palm and soy on DCF supply chain progress and reporting. Further details can be found in the [WWF 2025 traders' assessment](#).

BEEF

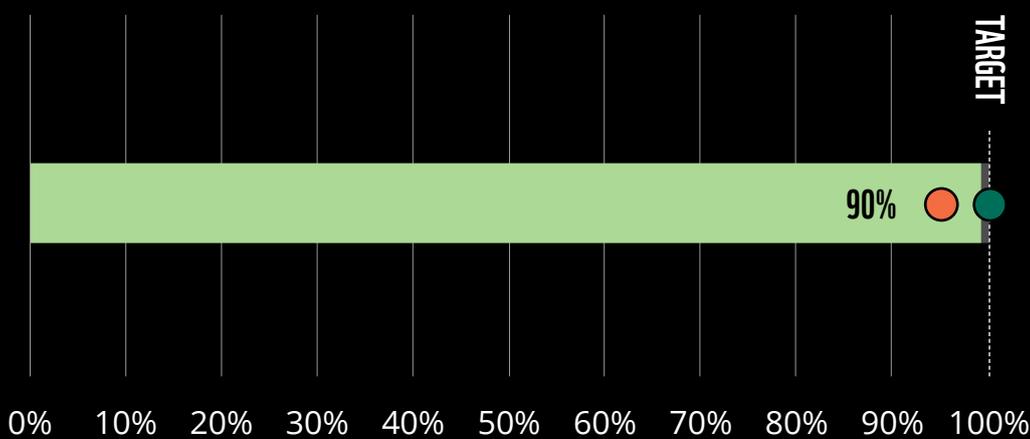
Cattle production remains the leading direct driver of deforestation and habitat conversion across South America,⁴⁹ which has in turn increased the spread of forest fires across the continent from the Amazon to Bolivian dry forests.⁵⁰ Despite many retailers having policies to source 100% British beef, the UK still has a significant overseas footprint. Based on known imports to the UK between 2019-2021, analysis by Trase has found that cattle products – namely beef and leather – are where the UK is likely linked to the biggest deforestation drivers globally.⁵¹

Seven out of the ten reporting retailers shared data on their beef sourcing, of which two continue to source a small proportion (up to 5%) of their beef from high-risk regions. Beef is also commonly sourced for non-human consumption,

such as for use in pet food, yet only two retailers confirmed that their reported data included beef used in their pet food – this exposes a major risk for retailers.

One of the retailers sourcing from high-risk regions uses a trader which has sufficient MRV systems in place to provide DCF supply. However, the other reporting retailer has also continued to source from a trader with no action plan in place to provide DCF material in 2024. For the resilience of cattle production globally it is critical that all retailers fully address the impacts of this significant direct driver of deforestation and stop undermining the capacity of sourcing regions to produce food now and in the long term.

% OF BEEF SOURCING THAT IS VERIFIED DEFORESTATION AND CONVERSION-FREE, OF LOWER RISK ORIGIN, OR UNVERIFIED



- Verified DCF
- Lower Risk Origin
- Unverified
- Highest Performer
- Lowest Performer

7/10
RETAILERS
REPORTED





BUILDING RESILIENCE – RESPONSIBLE COMMODITIES FACILITY

UK poultry, pork and salmon production relies heavily on soy, a commodity facing increasing pressures from the effects of a heating climate: multibillion-dollar losses in productivity are projected by 2030.⁵²

The impacts have been most prominent in the Brazilian Cerrado, where conversion rates have been three times higher than in the Amazon;⁵³ however, the impacts of ecosystem loss, changes to hydrology, and GHG emissions arising from land-use change will not be limited to one biome or continent. At the same time there is more than 25 million hectares of degraded or abandoned land, an area larger than the size of the UK, that could be used to produce soy without the need for any more clearance of native vegetation.

To protect native vegetation in high-risk areas of the Cerrado and incentivise optimisation of land use for agriculture three retailers (Sainsburys, Tesco and Waitrose) have invested into the Responsible Commodities Facility. To date the initiative has provided low-interest loans to 280 soy farmers who are growing a quarter of a million tonnes of soy without legal or illegal conversion of native vegetation. Aligned with the Brazilian government's objectives,⁵⁴ these investments secure DCF production and serve as a cost-avoidance strategy in areas threatened by drought and wildfires, shielding supply chains and landscape from escalating operational costs, supply scarcity and reputational risk.





KEY ACTIONS

2025 MILESTONE

Put processes and systems in place to accurately and comprehensively monitor, report and verify DCF supply for soy, palm oil, cocoa and beef.

2025 MILESTONE

For soy, support the finalisation of the MRV and DCF standard for the UK market (British Standard Institute (BSI) soy standard and/or aligned AIC DCF Standard).

2026 MILESTONE

Engage suppliers, including major traders, to implement robust DCF standards across supply chains with transparency on risks of inaction for wider value chain engagement, including governments and financial institutions.

2026 MILESTONE

Make long-term investments in DCF production landscape programmes to incentivise protection of natural ecosystems in high-risk areas with support for smallholders and local community led forest protection.

See [WWF's Blueprint for Action](#) for further details.





AGRICULTURE



WHY FOCUS ON AGRICULTURE?

Agriculture is one of the key drivers of global nature loss and is a major source of GHG emissions.⁵⁵ It is also one of the sectors hit hardest by climate change and extreme weather patterns. Farmers have clearly felt these effects in recent years: the winter of 2023/2024 was the wettest on record in the UK, leading to severe flooding. This was followed by the driest spring in over 100 years in 2025.⁵⁶ The UK farming sector is hanging by a thread. A recent study by the Energy and Climate Intelligence Unit showed that almost a third of farms surveyed had suffered complete crop or livestock losses in the past five years due to extreme weather.⁵⁷ These effects are compounded by the ongoing decline of nature. Depleted soils are less productive and do not retain water as effectively, worsening the impact of dry periods. In turn, this means that heavy rain can wash nutrients off fields into rivers,

harming the surrounding ecosystem.⁵⁸ The resulting volatility is not only devastating farmers' livelihoods; it also poses a serious threat to stable supply chains and food prices for consumers.

Thankfully there are ways in which the farming sector can reduce its impact on nature and climate while adapting to meet these challenges – indeed, it has already started to do so.

Many farmers are transitioning to more nature-friendly practices, integrating climate and biodiversity measures to make their businesses more resilient. But farmers need ongoing support from the private and public sector to make this transformation: this is critical if we are to meet our legally binding targets to restore nature, reduce GHG gas emissions, and ensure nutrition security for a growing population.

2030 OUTCOME	RETAILER PROGRESS MEASURE
At least 50% of fruit and vegetables & grains sourced in a robust scheme for biodiversity and soil health	% fruit and vegetables & grains sourced in a robust scheme for biodiversity and soil health
100% meat, dairy and eggs sourced to "Better" standards	% meat, dairy and eggs sourced to "Better" standards
At least 50% of fruit and vegetables & meat, dairy and eggs sourced from areas with sustainable water management	% fruit and vegetables & meat, dairy and eggs sourced from areas with sustainable water management
Agricultural emissions lowered in line with 1.5°C SBT	% of meat, dairy and eggs, fruit and vegetables & grains sourced from farms that are monitoring GHG footprint
	% of lowland peat in supply chains restored or sustainably managed
	% reduction in forestry, land-use and agricultural (FLAG) emissions





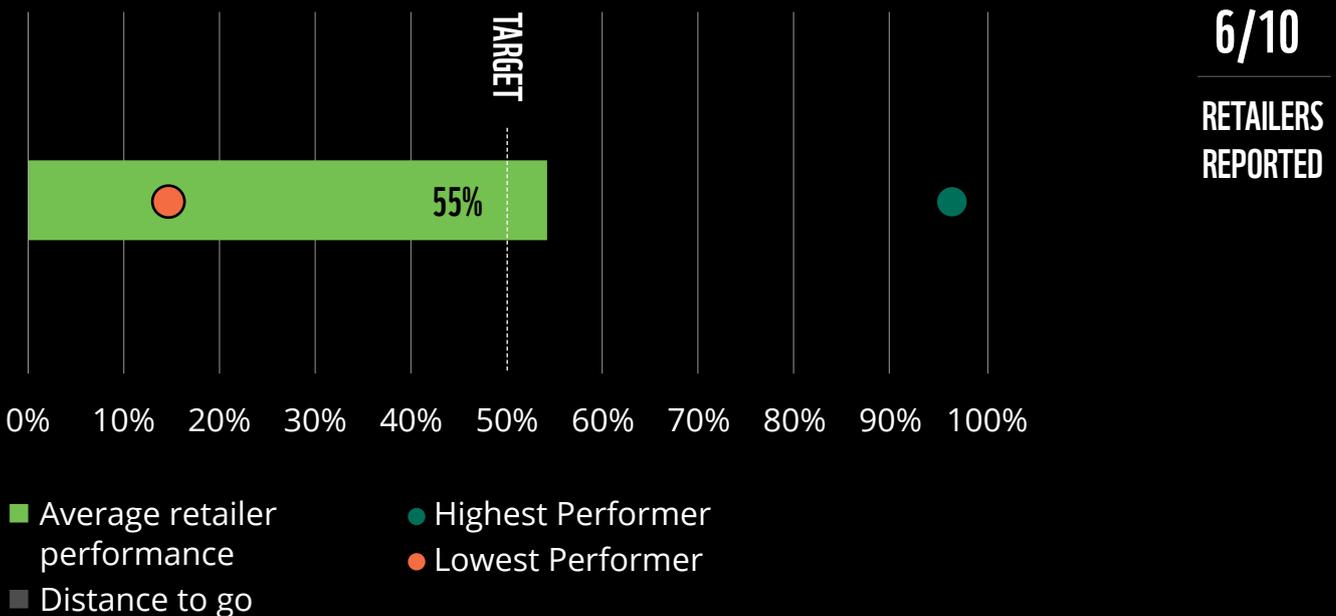
PERFORMANCE AND PROGRESS

% FRUIT AND VEGETABLES SOURCED IN A ROBUST SCHEME FOR BIODIVERSITY AND SOIL HEALTH

Healthy soils and rich biodiversity are essential for productive horticulture, as they underpin ecosystem services like nutrient cycling, pollination and plant growth. Where this year has seen shortages in crops like broccoli and potatoes due to extreme weather,⁵⁹ increasing soil organic matter can help lessen the impact.⁶⁰

Roughly 65% of the fruit and vegetables consumed in the UK are imported,⁶¹ which is why this year WWF assessed schemes in the sourcing countries France and South Africa. Some retailers also reported data for branded products and grains for the first time.ⁱ

% FRUIT AND VEGETABLES SOURCED IN A ROBUST SCHEME FOR BIODIVERSITY AND SOIL HEALTH



ⁱ Branded data and grain data are not reflected here because the minimum threshold for reporting was not reached. Nonetheless, it is encouraging to see growing engagement on these.

Encouragingly, the data shows that the five reporting retailers source significantly more fruit and vegetables from growers in a robust scheme for biodiversity and soil health than in previous years, and have already exceeded the target of 50% set for 2030. However, the data shown here paints an incomplete picture as WWF can currently only assess the proportion of produce grown the UK, France and South Africa, representing roughly 48% of retailers' global sourcing.

The strong performance shown here is mainly driven by retailers' UK data: more than half the retailers have set public, time-bound targets for all their UK growers to be LEAF Marque certified. In fact, reporting retailers are now sourcing

on average 96% of their UK fresh produce from LEAF growers. However, in order to be deemed a "robust" scheme retailers were required to demonstrate additional habitat protection on farms, as this is currently not mandatory under LEAF Marque. Retailers unable to verify this habitat protection threshold should seek to improve data systems or integrate a mandatory 5% habitat threshold in sourcing standards.

While the data here only covers part of the retailers' supply, the strong UK performance can provide valuable lessons for other sourcing regions: setting public, time-bound targets for achieving certifications raises the industry standard and gives clear expectations to growers.





BUILDING RESILIENCE - REGENERATIVE ARABLE FARMING

As in previous years, there was insufficient data to report on grains. The lack of traceability of grain supply chains also means that it is more difficult for arable farmers to access financial support to future-proof their businesses. There are simply too many middlemen and production steps between the grain in the field and the foods on the supermarket shelf. At the same time, the arable sector is strongly affected by climate change. Some farmers reported a 50% drop in wheat yields this year due to the extremely dry spring.

A 2024 comparative field study by Bristol University and Wildfarmed, a food and farming business and producer of regeneratively farmed wheat, oats and barley, shows that regenerative farming can play a vital role in

restoring biodiversity, creating functional, resilient farm ecosystems. The researchers measured 3.7 times more buff-tailed bumblebees and 79% greater total insect biomass in Wildfarmed's regenerative fields compared to conventional fields. Pollinators are the quiet powerhouses of farm resilience. They enhance plant diversity through cross-pollination with positive knock-on effects on disease and pest resilience as well as soil health. This study shows one of many ways in which a transition to more nature-friendly farming could help build a more resilient farming future. Retailers using and selling Wildfarmed products include M&S, Tesco, Waitrose and Ocado.





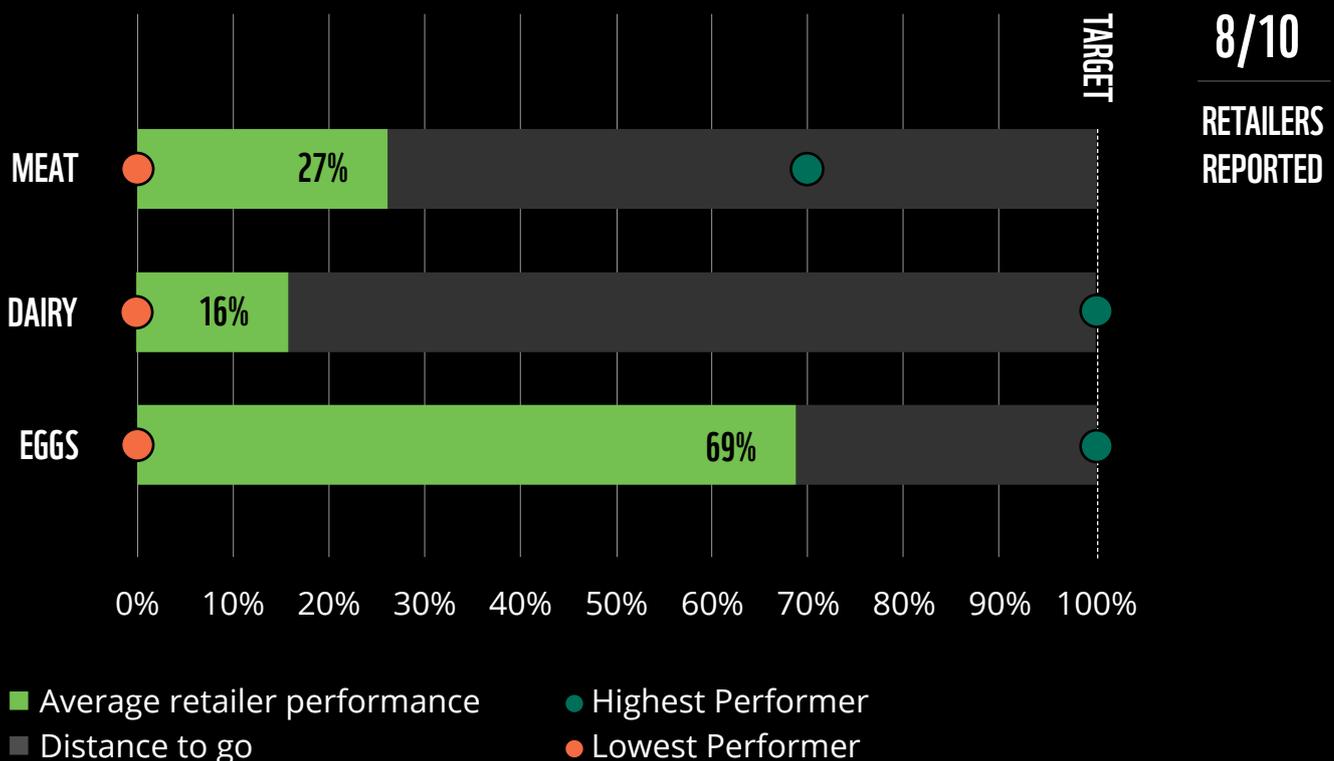
% MEAT, DAIRY AND EGGS SOURCED TO “BETTER” STANDARDS

This measure focuses on the proportion of own-label meat, dairy and eggs from the UK that are sourced according to “Better” standards as defined by the Sourcing Better Framework – developed by an alliance representing more than 70 farming, animal welfare, health and environmental NGOs – and accompanying practice catalogue.⁶⁴

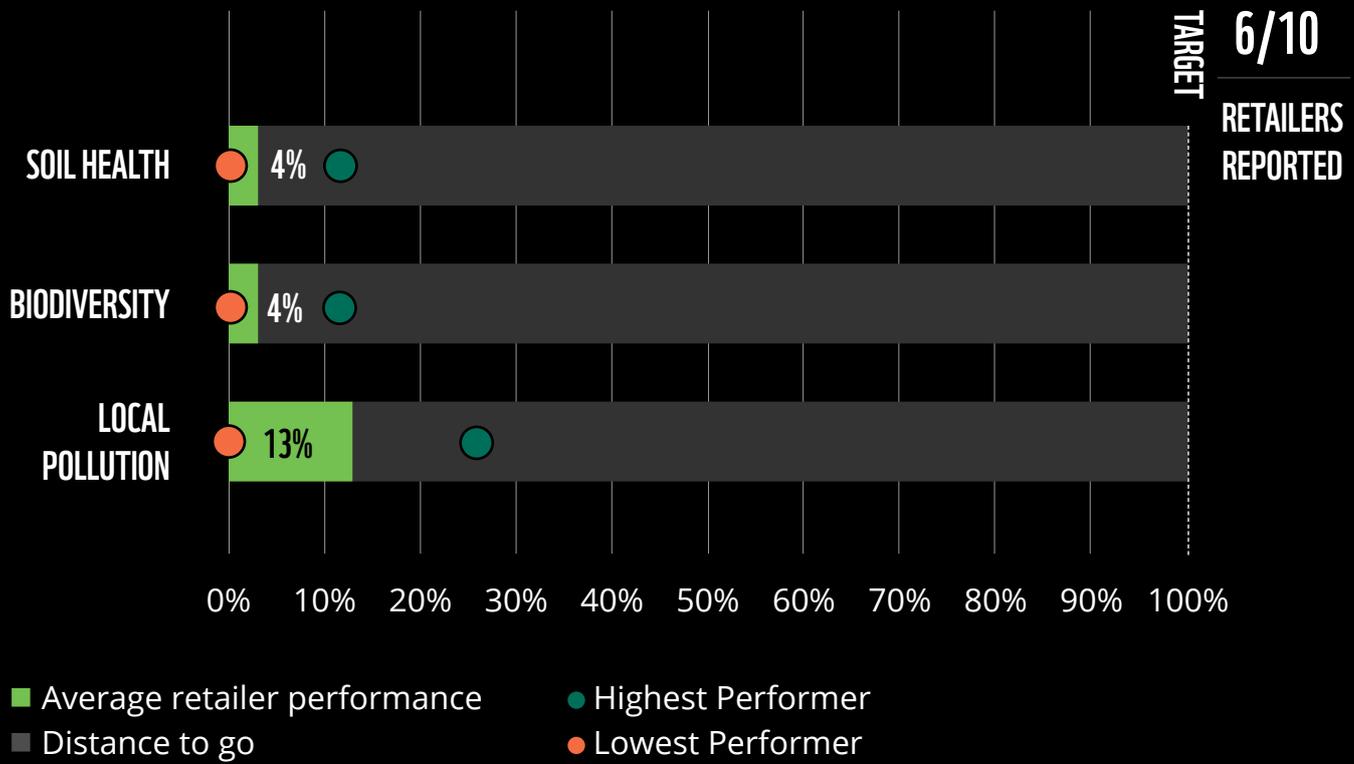
Livestock farming uses over three-quarters of agricultural land and generates about 12% of global GHG emissions,⁶⁵ with animal feed production being a major cause of deforestation and habitat conversion in Brazil and Argentina. Industrial livestock units, sometimes referred to as ‘megafarms’, drive major nature and climate impacts. This was recently acknowledged by a local authority in Norfolk who blocked planning permission

for a new pig and poultry megafarm on climate and nature grounds.⁶⁶ The systemic shift to industrial livestock production is also driving down farm gate prices for smaller producers⁶⁷ who are struggling to keep their businesses running. This is particularly evident in a year with adverse weather conditions for grazing. Drought conditions in the UK this year have reduced forage yields significantly, putting economic pressure on farmers who have had to import even more feed than usual, sometimes needing to sell animals to cope.⁶⁸ But when farmed to “Better” standards, livestock has the potential to contribute to increased biodiversity and soil health, forming part of a healthy ecosystem. Eating less but better meat restores nature, boosts soil fertility, protects water resources, and reduces reliance on imported feed.

% MEAT, DAIRY AND EGGS SOURCED TO “BETTER” STANDARDS FOR ANIMAL WELFARE



% MEAT, DAIRY AND EGGS SOURCED TO "BETTER" STANDARDS FOR SOIL HEALTH, BIODIVERSITY & LOCAL POLLUTION



For this year WWF-UK updated the practice catalogue for “Better” meat, expanding the list of certification schemes and also allowing retailers to show individual progress outside of schemes. Despite this broadened scope, progress on the environmental standards is insufficient, with only 4% of meat, dairy and eggs sourced to higher biodiversity and soil health standards. Most schemes overlook the potential role livestock can play in improving habitat and soil health. Some retailers are taking action outside certification schemes through dedicated farming groups that track sustainability indicators.

Progress on local pollution is slightly better (13% on average across all products), but it is not on track to reach the 2030 target. Compliance with slurry management requirements is a major issue.⁶⁹

Further action like proactive nutrient management alongside fair and enforceable regulation is needed to prevent and reverse local pollution caused by livestock farming.

On animal welfare, 22% of meat, dairy and eggs meet “Better” standards, with large differences between the highest and lowest performers. Waitrose have become the first UK retailer to meet the Better Chicken Commitment for all their own-label chicken this year.⁷⁰ Many retailers have supplier groups with higher welfare standards; however, it is unclear how much of the overall supply these groups cover for each retailer.

In addition, 88% of retailers report on or set targets for antibiotic use in meat, dairy and eggs, a significant improvement compared to 50% in 2024.





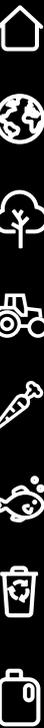
BUILDING RESILIENCE – HOW REGENERATIVE LIVESTOCK FARMING COULD DELIVER FOR PEOPLE AND PLANET

While retailers' farming groups ensure better standards for the participating suppliers, this does not match the scale and urgency of the challenge. In a recent Inside Track publication, senior professionals working in the food retail sector revealed that the commercial drive to grow meat and dairy sales further are incompatible with the sustainability targets set by the same businesses. The food industry is painting a picture of supporting British family farms while simultaneously driving farmers away from lower impact, high welfare farming through pressure on price and volume.⁷¹

To achieve environmental sustainability at scale, the whole food system needs to shift away from industrial livestock production and to a system where animals play a positive role in ecosystems, biodiversity and the production of healthy, sustainable food. Many UK livestock farmers are locked into a high-input, low-profit business model with high risk exposure.

A staggering one third of UK dairy farmers are uncertain about continuing production beyond 2025 due to the inflation of input prices, including feed, energy and fertiliser.⁷² Rigorous economic modelling in a [recent report by WWF and NatWest](#) shows that shifting to a regenerative system with reduced inputs can provide farmers with a more profitable business model while placing them at the forefront of efforts to restore nature in the UK. Farmers need adequate, long-term and genuine financial support from the public and private sector to succeed in this transition. It is the government's responsibility to send a strong signal to the market on the direction of travel by delivering Environmental Land Management schemes that provide farmers with public money for public goods.





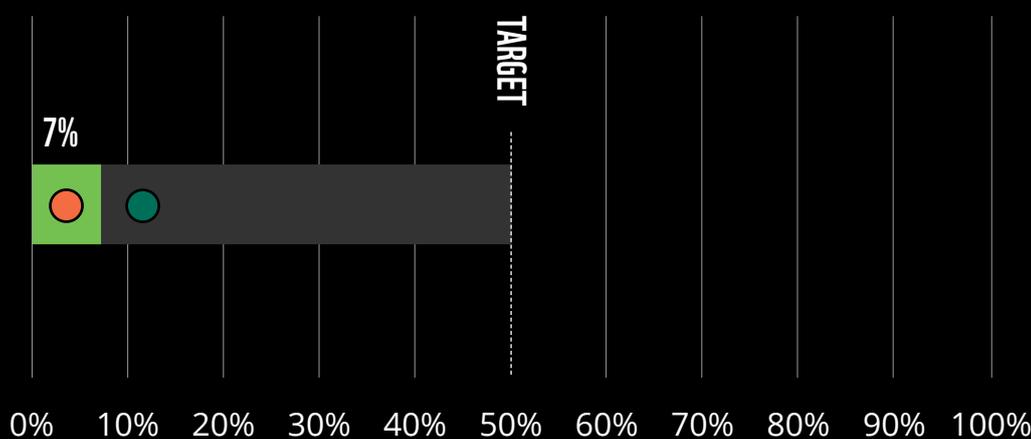
% FRUIT AND VEGETABLES & MEAT, DAIRY AND EGGS SOURCED FROM AREAS WITH SUSTAINABLE WATER MANAGEMENT

Through the WWF Basket and WRAP's UK Food and Drink Pact Water Roadmap, retailers are working towards sourcing at least half their fresh food (fruit, vegetables, meat and dairy) from river catchments with sustainable water management delivering rivers in good health and used within environmental limits. In a time of escalating water risks, both in terms of availability and quality, focusing on catchment sustainability rather than just farm practices ensures the goal reflects our intention to deliver real-world environmental outcomes. Understanding of sourcing locations is key to making meaningful assessments of the sustainability of supply chains with respect to freshwater.

This year, two more retailers reported data against this measure, which led to a drop in the overall average – reflecting improved data capture rather than worsening catchment conditions.

Despite efforts made to improve data systems, greater transparency is needed, as the majority of retailers are still unable to provide coverage across all categories of fruit and vegetables, meat, dairy and eggs. On average, 60% of the reported volume sold was assessed against the sustainability of sourcing catchments: reflecting both the availability of data on sourcing locations and the coverage of data on the sustainability of catchments (the former being the most significant factor). To ensure a more accurate reflection of the reality, the figures shown above on the percentage of sourcing from areas with sustainable water management reflect the proportion of the assessed sourcing volumes that were sustainable, not the proportion of the overall volume sold.

% FRUIT AND VEGETABLES & MEAT, DAIRY AND EGGS SOURCED FROM AREAS WITH SUSTAINABLE WATER MANAGEMENT



5/10

RETAILERS REPORTED

- Average retailer performance
- Distance to go
- Highest Performer
- Lowest Performer



BUILDING RESILIENCE – RESTORING CATCHMENTS, SECURING FOOD SUPPLY

There are many examples of how the ecological restoration of catchments can secure agricultural supply chains and the natural systems they depend on. In South Africa's Boland–Groot Winterhoek Water Source Area, WWF, with support from the Waitrose Foundation, have cleared 800 ha of invasive alien plants, releasing an estimated 217,000m³ of water, which stays in the system for as long as these areas remain cleared and is thus prevented from being lost to evapotranspiration. This is enough water to irrigate around 30 ha of orchards annually. Multiple UK retailers (Aldi, Asda, Co-op, Lidl GB, M&S, Morrisons, Ocado,

Sainsbury's, Tesco, and Waitrose) are also contributing to WRAP's collective action project under the [Water Roadmap](#) that has cleared an extra 300 ha in the region. The additional flows made available from these two projects are directly safeguarding fruit and wine production in a globally important supply region. Equally, when left instream as environmental flows, this water strengthens the resilience of the wider catchment – sustaining ecosystems, buffering drought risk, and ensuring more reliable supplies for farms, packhouses and communities alike.



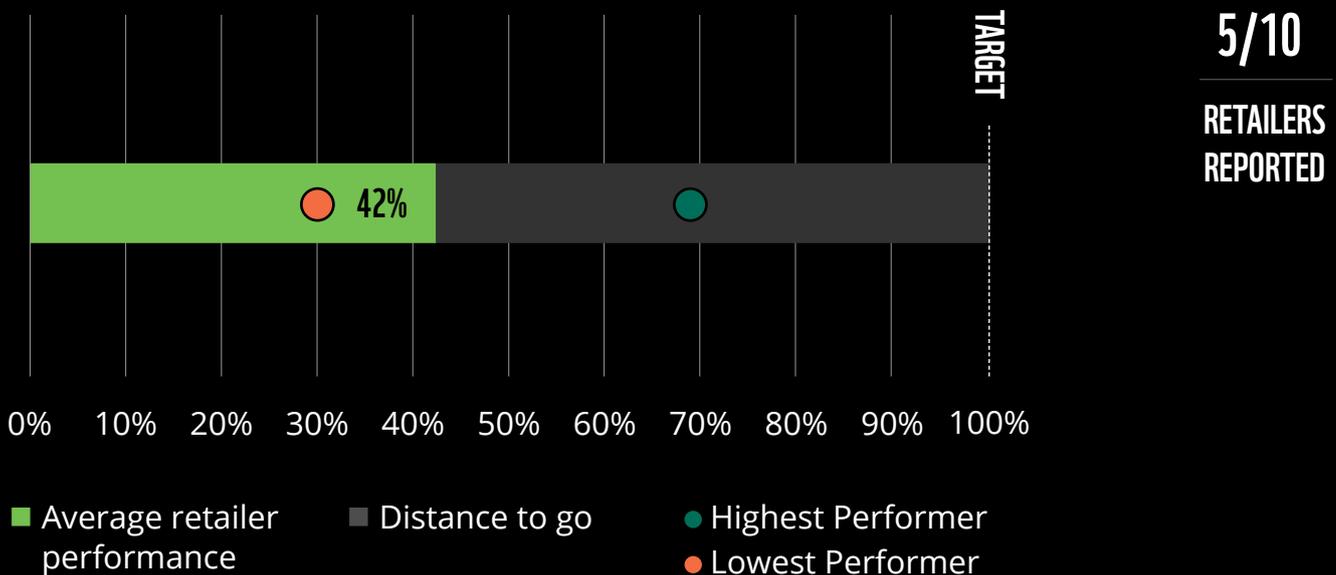
% OF MEAT, DAIRY AND EGGS, FRUIT AND VEGETABLES & GRAINS SOURCED FROM FARMS THAT ARE MONITORING GHG FOOTPRINT

For retailers to achieve their emissions targets, it is critical that they engage with the farmers that supply them to monitor their emissions. Farming is the single biggest source of emissions across the supply chain, and conducting farm carbon footprints can equip farmers with the knowledge they need to reduce emissions.^{73,74} Furthermore, reducing farm-stage emissions can also have co-benefits for the whole supply chain, from reducing money spent on inputs like fuel and fertiliser, to sequestering carbon by building soil organic matter with benefits for crop health and water retention, making landscapes more resilient to floods and droughts.

Disappointingly, the data shows only a small reduction in retailers providing data for this metric.

As well as making the results harder to compare with last year's data, it is concerning if this means that retailers are reducing their engagement with their farmers and suppliers on measuring GHG emissions at the farm level. As with some other measures, retailers have difficulties linking sourcing volumes with individual farms within their supply chain, which is particularly evident for those retailers with less direct relationships with producers. To achieve better transparency, retailers could make GHG footprinting a uniform requirement for their suppliers and farmers, or alternatively a requirement for GHG footprinting being linked to some form of certification, and thus be integrated into the systems retailers already use to monitor sustainability.

% OF MEAT, DAIRY AND EGGS, FRUIT AND VEGETABLES & GRAINS SOURCED FROM FARMS THAT ARE MONITORING GHG FOOTPRINT



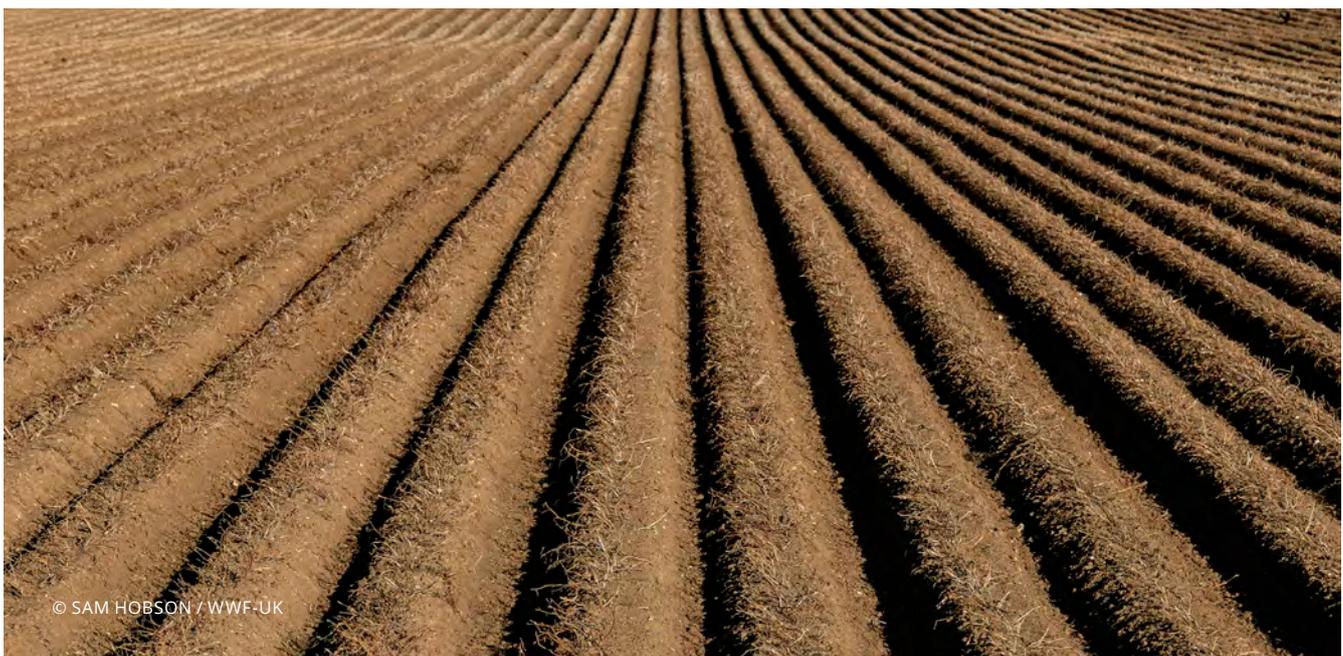
% OF LOWLAND PEAT IN SUPPLY CHAINS RESTORED OR SUSTAINABLY MANAGED

Peat soils are vital carbon sinks and habitats, but intensive farming has led to their degradation, turning them into GHG emitters. Supporting farmers to transition to more sustainable peat farming is not just imperative to reduce retailers' Scope 3 emissions and nature impacts, but also to provide a stable, long-term supply of vegetables. Without a transition away from the current farming regime, peat will continue to lose its fertility and capacity to deliver high-yielding vegetable crops without increased inputs.⁷⁵

Since more than 40% of the UK's vegetables are grown in lowland peat, this makes explicit the role of farmers in developing mosaic landscape approaches where sustainable food production and nature restoration sit alongside each other.ⁱⁱ WWF's position on farming on peat therefore has an increased focus on the sustainable management of peat soils.

For the first time, retailers were able to provide data on restoration and sustainable management, despite insufficient quantitative data. In the last year there has been growing momentum on this topic, with six retailers reporting that they are part of the Retail Peat Group, working with industry to phase out the use of peat as a growing medium in horticulture. Three retailers have gone further and have become members of Fenland SOIL, supporting farmers to tackle climate issues relating to agriculture and peat in the East Anglian Fens.

**MORE THAN 40% OF
THE UK'S VEGETABLES
ARE GROWN ON
LOWLAND PEAT**



© SAM HOBSON / WWF-UK

ii WWF and Fenland SOIL worked with farmers, soil experts and academics to co-develop principles for more sustainable farming on peat. The full suite of reports is available at [WWF Basket: Agriculture | WWF](#)





KEY ACTIONS

2025 MILESTONE

Put in place systems to gather and process on-farm data that captures sustainability attributes aligned to the WWF Basket metrics.

2026 MILESTONE

Implement a supplier engagement strategy that reaches all own-label suppliers and supports them to achieve the WWF Basket Outcomes.

2026 MILESTONE

Engage with branded product suppliers on achieving the WWF Basket Outcomes.

See [WWF's Blueprint for Action](#) for further details.





DIETS



WHY FOCUS ON DIETS?

In the UK, poor diets are the leading cause of preventable deaths, costing over £67.5 billion annually in healthcare and £116 billion in lost productivity.⁷⁶ Yet the commercial food offer lacks diversity: just five animal species and 12 plant species provide 75% of our calories.⁷⁷ This lack of diversity poses a threat to our nutrition security, limiting the availability of macro and micro nutrients and making our nutrient supply vulnerable to disruption, amplifying the risks of climate and market shocks.⁷⁸

Retailers have a critical role to play. By proactively rebalancing sales towards a healthier, more diverse and sustainable diet - aligned with the Livewell diet - which emphasises more fruit, vegetables, pulses and wholegrains, alongside moderated consumption of animal protein - they can reduce exposure to risk, strengthen their consumer offer, and gain trust among policymakers and investors.⁷⁹ Supporting the adoption of such a diet not only improves health outcomes but also reduces environmental impacts associated with consumption.⁸⁰

The risks of inaction are significant. Heavy reliance on livestock-based proteins - meat (red and white), dairy and eggs - leaves retailers vulnerable to heat stress, drought, disease outbreaks, and volatile

input costs.⁸¹ Climate-related disruptions are already driving food price instability, with additional costs to the food industry projected at \$120 billion within five years.⁸² Inaction also carries reputational risk for businesses. When dietary data shows little movement year-on-year, credibility to deliver against commitments is undermined in the eyes of regulators, investors⁸³ and consumers.

By contrast, resilience is a commercially relevant choice. Rebalancing the UK diet in line with Livewell would reduce the dietary carbon footprint by 36% while improving nutrition.⁸⁴ Increased consumption of diverse diets - based on a range of plant foods such as chickpeas, beans and lentils - not only improves nutritional diversity but also enhances resource efficiency and adaptability to climate stress.⁸⁵ Encouragingly, consumers increasingly demand food businesses align with this transition; two-thirds of shoppers say they are already changing, or considering changes, to make their diets healthier and more sustainable.⁸⁶

Retailers who prioritise protein diversification, reformulate product ranges and align portfolios with these evolving consumer habits will reduce exposure, secure investor confidence and capitalise on first-mover advantage.⁸⁷

2030 OUTCOME	RETAILER PROGRESS MEASURE
Achieved a shift to a healthy, sustainable diet, aligned with Livewell	% of protein food sales from livestock-based, seafood-based, and plant-based sources
	% of wider sales across the main Eatwell food groups
	% of composite products that are vegetarian, vegan, livestock-derived, and seafood-derived



PROTEIN DIVERSIFICATION

Animal protein can form part of a healthy balanced diet, yet high intakes of meat are also associated with a number of negative health outcomes, including cancer and cardiovascular disease.⁸⁸ UK diets remain heavily dominated by livestock protein sources, containing twice as much meat as the global average.⁸⁹ As well as being associated with a high environmental impact, livestock production is one of the sectors most vulnerable to climate change, with droughts, floods and heatwaves severely impacting feed crop yields.⁹⁰ The consequences are already being reflected in all-time-high inflation of global meat prices.

Retailers at the forefront of the protein transition have much to gain by reducing dependency on volatile emissions- and input-intensive livestock systems and tapping into growing markets, such as plant-based products.⁹¹ Despite the benefits to companies in driving protein diversification, retailers have only made marginal improvements in the proportion of sales compared to last year. On average, 77% of protein sales still come from livestock-based sources, with 12% from plant-based, and 11% from seafood, while Livewell recommends no more than 40% of protein sales should come from livestock, with 30% each from seafood and plant-based sources of protein. There is still a long way to go, but businesses are demonstrating it's possible. Across Europe, progress is being made in the form of clear commitments by retailers; this year Ahold Delhaize announced a target of 50% plant-based food sales by 2030 and REWE in Germany has set targets to achieve 60% of sales from plant-based products by 2035.^{92,93} Eleven supermarkets in the Netherlands, representing 90% of the market, have also committed to selling 60% plant-based proteins by 2030.⁹⁴

Whilst target setting is a critical first step, analysis from Food Foundation and Foodrise found that individual company pledges are fragmented and poorly enforced, enabling companies to make public commitments to future goals without any guarantee of adequate or timely action, emphasising the need for Government to enforce mandatory reporting standards to hold companies to account on targets.⁹⁵

In contrast to the strides being made by EU retailers, it is disappointing to see fewer UK retailers reported on this metric compared to last year. Good data drives good decision-making, for businesses and policymakers alike. WWF, alongside other health and environmental organisations, has called for the government to introduce mandatory gold standard public reporting, including provision of ingredient-level data.ⁱⁱⁱ

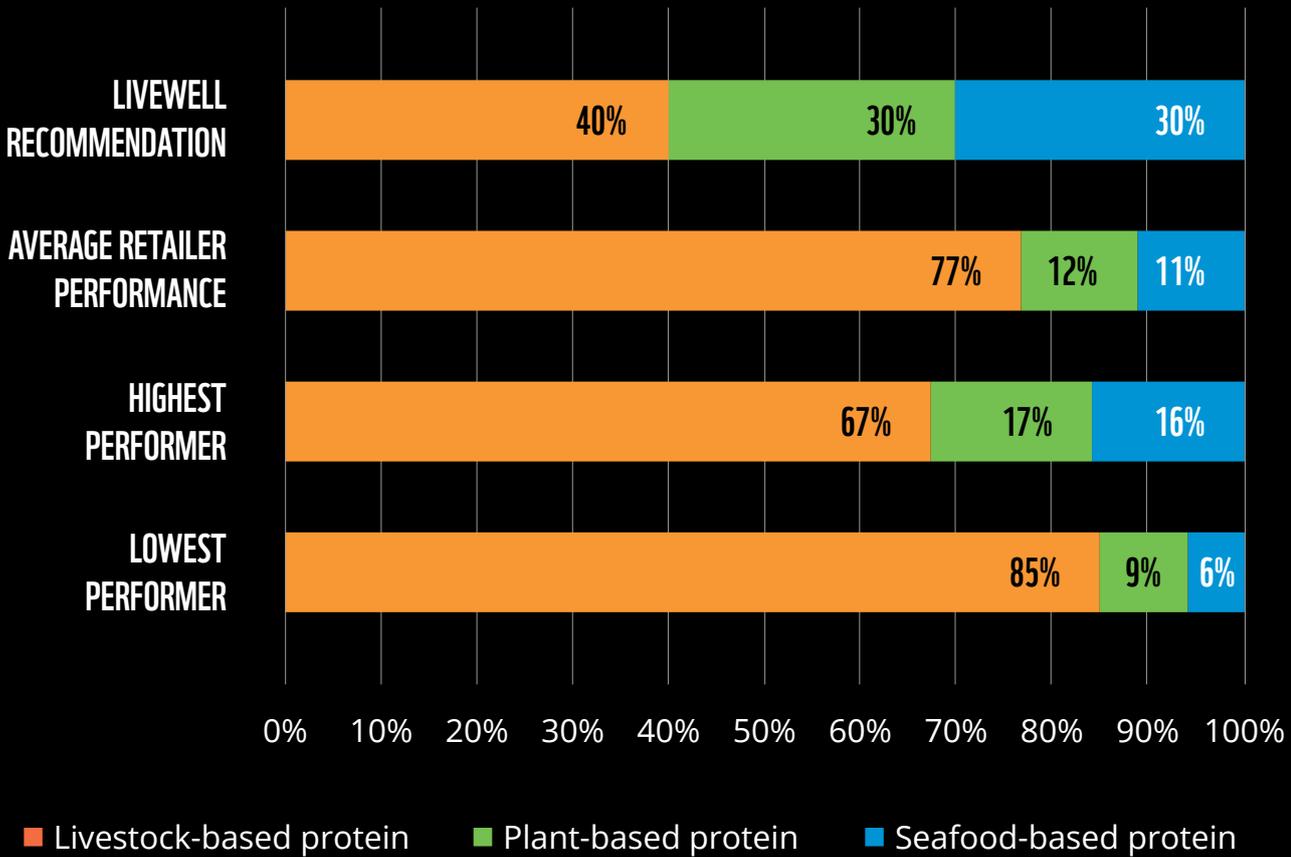
Where retailers may not be able to provide ingredient-level data, they are able to share what percentage of composite product sales are categorised as vegetarian, vegan, livestock-based, and seafood-based. This year, two additional retailers reported against this metric, making it challenging to compare to previous years, but engagement with this metric and the split across the sales suggest product reformulation and portfolio diversification are starting to succeed in the market. The share of meat-based composite sales has fallen significantly, from 61% last year to 49% this year. This decline has been offset by increases in vegetarian (26% to 32%) and vegan (7% to 13%) options.

iii See [WWF's Diets metric guide](#) for best practice.

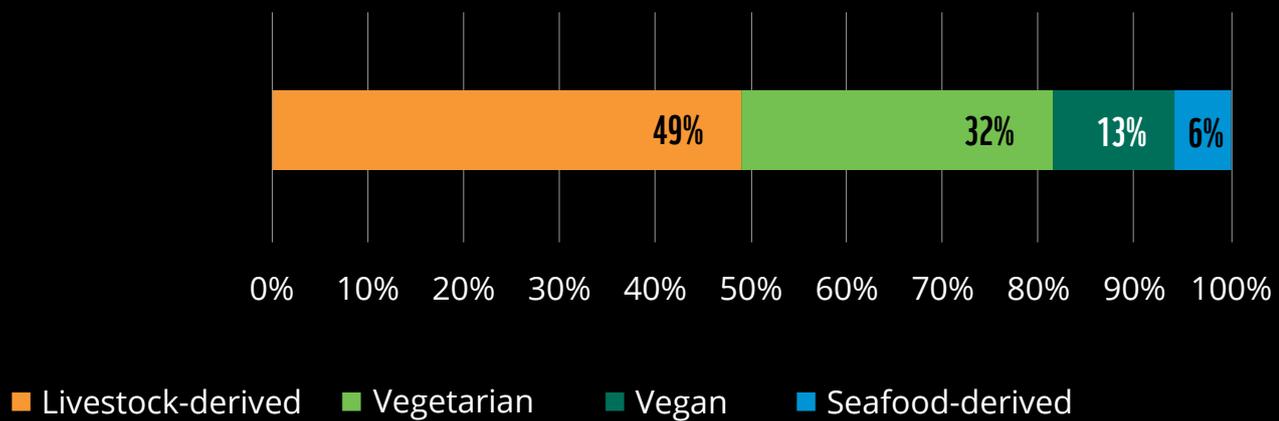




% OF PROTEIN FOOD SALES FROM LIVESTOCK-BASED, SEAFOOD-BASED, AND PLANT-BASED SOURCES



% OF COMPOSITE PRODUCTS THAT ARE VEGETARIAN, VEGAN, LIVESTOCK-DERIVED, AND SEAFOOD-DERIVED





BUILDING RESILIENCE - LIDL GB AND THE PLANETARY HEALTH DIET

In line with the [Planetary Health Diet](#), Lidl GB has set public targets for 25% of global protein sales to come from plant-based sources (2030), to increase the volume of wholegrains to 25% of total grains (2030), to increase fruit and vegetable sales by 35% (2026), and to increase the tonnage of fibre sold by 20% (2026)^{iv}. These commitments will reduce overexposure to livestock supply chains, while meeting growing consumer demand for healthier, lower-impact foods.

It also positions the business to align with emerging mandatory health reporting, deliver on its net-zero commitments, and secure investor expectations around sustainable diets.⁹⁶

This strategy demonstrates that dietary transformation is not only a sustainability priority but also a resilience measure. By diversifying its portfolio, Lidl GB is insulating its business against climate and supply shocks and building competitiveness for the long term.⁹⁷



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iv The Planetary Health Diet is a globally applicable framework, whereas the Livewell diet takes into consideration national dietary guidelines for the UK.

% OF WIDER SALES ACROSS THE MAIN EATWELL FOOD GROUPS

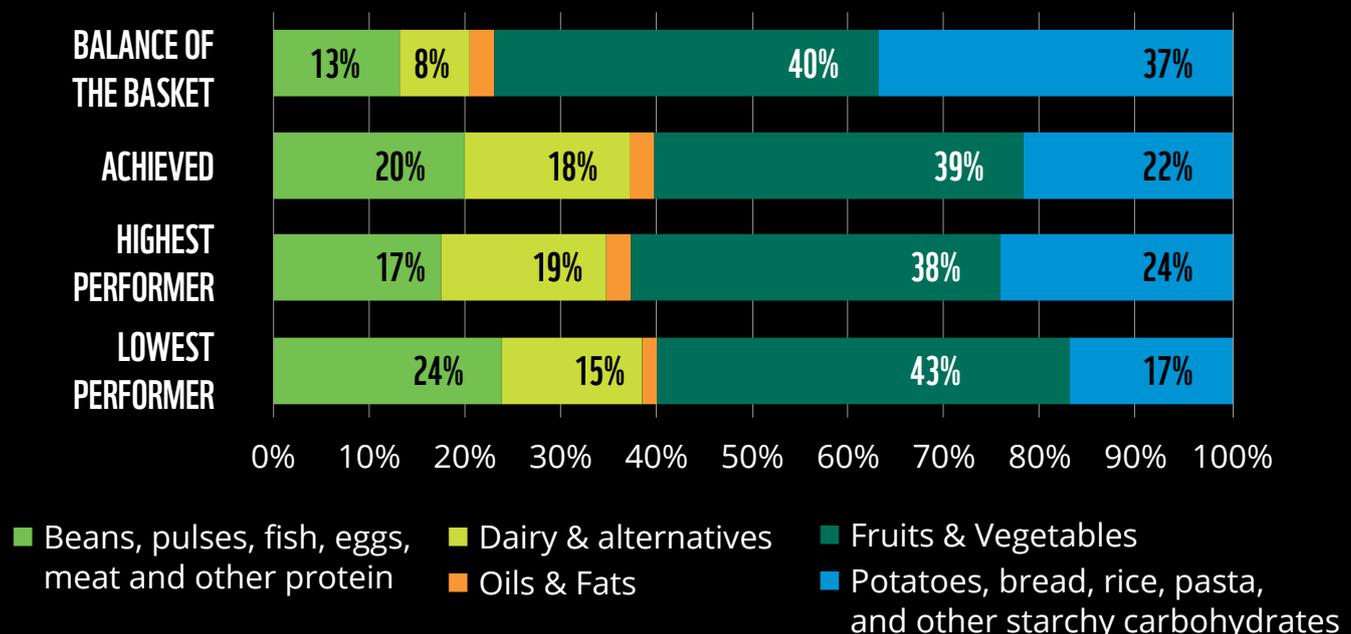
Today, fewer than 1% of UK adults meet the government’s nutritional guidelines for a healthy diet, while the average diet produces 4.84kg CO2e per person per day – more than double the level compatible with 1.5°C climate targets.⁹⁸ The Livewell diet is designed to meet UK nutritional recommendations by aligning closely with our national dietary guidelines, the Eatwell Guide. Livewell ensures adequate intake of essential nutrients while promoting health through increased consumption of plant-based foods and reduced intake of animal protein. By emphasising fruits, vegetables, wholegrains and plant proteins, Livewell supports balanced nutrition and contributes to lower risks of diet-related diseases, all within socially acceptable and affordable dietary patterns.

Because individual food choices are significantly shaped by the availability, affordability and accessibility of food types, retailers can play a key role in the transition to diets that are high in human health benefits and low in environmental impacts.

The ‘Balance of the Basket’ metric assesses volume sales across five main food groups. With one more retailer providing data for this metric than last year, retailers are moving closer to aligning sales with a balanced diet. The average gap to reaching targets has narrowed from 37 to 33 percentage points, driven by positive shifts in fruit and vegetable market share and continued strength on fats and oils. However, diets remain misaligned overall: sales of dairy and meat remain well above recommended levels, and the protein split metric demonstrates animal-based proteins are dominating that category. Progress is promising, albeit incremental: meaningful shifts are yet to be achieved at scale.

While retailers play a key role, driving a shift in UK diets will require government intervention to deliver scale. [The Danish wholegrain partnership](#) is an example of a public-private collaboration which has managed to improve wholegrain intake – and therefore fibre intake – in Denmark through successful public campaigning and cross-sector collaboration.⁹⁹

% OF WIDER SALES ACROSS THE MAIN EATWELL FOOD GROUPS



v Sales data is not reflective of intake data; NDNS data shows fruit and vegetable consumption is low.





KEY ACTIONS

2025 MILESTONE

Have in place systems and processes to capture, assess and disclose protein sales at the ingredients level aligned with the WWF Protein Disclosure Guide.

2026 MILESTONE

Make a healthy and sustainable diets strategy publicly available. The strategy should include a clear pathway to influencing customer behaviour.

2026 MILESTONE

Train staff in key teams across the business in healthy and sustainable diets.

See [WWF's Blueprint for Action](#) for further details.





MARINE



WHY FOCUS ON MARINE?

UK retailers sell around 410,000 tonnes of seafood (valued at £4.6 billion)¹⁰⁰ annually, sourced from both wild-capture fisheries and aquaculture. Meeting Livewell dietary guidelines will require even higher seafood consumption,¹⁰¹ creating both challenges and opportunities for retailers to source responsibly.

However, global ocean ecosystems are approaching critical tipping points, due to a variety of human-induced environmental factors including fisheries collapse, ocean deoxygenation and major ecosystem shifts in species distribution.¹⁰²¹⁰³ Overfishing has led to the collapse of several fish stocks, disrupting marine ecosystems and local communities dependent on them,¹⁰⁴ while climate-induced changes in ocean conditions are adding further stress.

As ocean temperatures rise, important UK commercial fish species are shifting their geographical distribution. In the UK, cod and haddock are moving further north to cooler waters, while John Dory and octopus are becoming more prevalent in southern waters.¹⁰⁵ Without a systemic shift in how seafood is sourced to address risks such as fish stock depletion, greater demand threatens the availability, stability and affordability of seafood products.

Building resilience in the UK seafood supply chain requires urgent attention and collaboration. UK retailers must respond by ensuring that ecosystem-based management approaches are integrated into their sourcing practices, driving multi-stakeholder collaboration throughout the supply chain.

2030 OUTCOME	RETAILER PROGRESS MEASURE
100% of seafood from sustainable sources	% certified wild-caught and aquaculture material sourced % of wild-caught resources adhering to all aspects of the Seafood Jurisdictional Initiative
Reduce fishmeal and oil usage to FFDR<1 by using sustainable fishmeal and fish oil replacements and increasing the use of trimmings	% farmed seafood products with FFDR (FFDRm and FFDRo)<1 % certified feed ingredients



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% OF CERTIFIED WILD-CAUGHT AND AQUACULTURE MATERIAL SOURCED

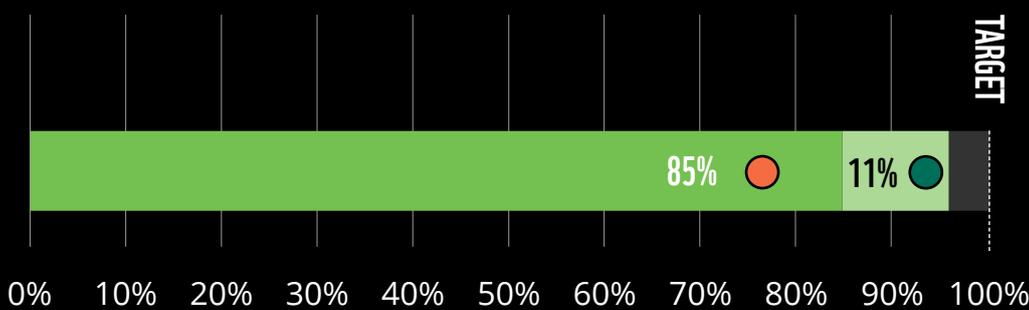
Certification sets a minimum industry standard to reduce risks, such as overfishing and poor governance, while strengthening market access and helping to secure fisher livelihoods. Average retailer performance on certification remains high (85%), which is broadly consistent with last year, though a significant gap remains to achieve 100% coverage. Certification alone, however, is not enough to shield against threats like climate change, shifting stock distributions or social conflict, and is regarded as the minimum threshold for sustainable sourcing.

For the first time, WWF have reported retailer engagement in fishery improvement projects (FIPs) to reflect the investment being made to promote responsible fishing practices and strengthen governance in higher-risk fisheries. These fisheries require targeted action plans to address environmental challenges and build resilience within the supply chain, as part of their journey toward certification and beyond. FIPs represent a collaborative, stepwise approach that leverages private sector support to improve fishing practices

and management. For example, in the Philippines, a tuna FIP supported by UK retailers enabled community-based handline fishers to achieve third-party certification. FIP engagement not only improved local fishery management but also unlocked better market access, demonstrating how FIPs can strengthen both ecological and economic resilience.¹⁰⁶

Retailers' support for FIPs reflects a commitment to continuous improvement, ensuring that even non-certified fisheries are on a credible path to responsible sourcing. Encouragingly, combining certified products and those in FIPs results in an average of 96% of retailers' seafood being responsibly sourced. Despite this, FIP engagement varies significantly across retailers, revealing a fragmented approach to fisheries improvement. By aligning their FIP efforts and publicly reporting on their sourcing activities, retailers can demonstrate transparency, a foundation for more effective collaboration. Transparency not only fosters trust among key stakeholders, but also incentivises responsible fishing practices.

% CERTIFIED WILD-CAUGHT & AQUACULTURE MATERIAL SOURCED



9/10

RETAILERS REPORTED

- Average retailer performance
- Average engagement with FIPs
- Distance to go
- Highest Performer
- Lowest Performer

% OF WILD-CAUGHT RESOURCES (NEPHROPS, MACKEREL, TUNA) ADHERING TO ALL ASPECTS OF THE SEAFOOD JURISDICTIONAL INITIATIVE (SJI)

Building long-term resilience in seafood supply chains requires moving beyond certification to address the full spectrum of ecosystem, social risks and regulatory reforms. The SJI reflects this approach by providing a defined jurisdictional framework that goes beyond the level of the product. It assesses supply chain performance against six impact areas: human rights, climate, fish biology, fishing activity, governance, and value chain actions. The SJI is not a scoring system but instead enables retailers and other key stakeholders to identify and manage risks holistically, rather than in isolation. This jurisdictional perspective ensures that interventions target the root causes of unsustainable practices, strengthen collaboration across all stakeholders, and secure seafood sourcing that is resilient and transparent.

Despite their importance for resilience, jurisdictional approaches to seafood sourcing are not yet common practice for retailers. However, in a positive first step this year, data from 15 suppliers was provided on behalf of five retailers, to complete the SJI checklist for nephrops, mackerel and tuna. The checklist is a practical tool developed by WWF to help the seafood market (both retailers and suppliers) identify key risks to sourcing, providing a framework to assess fisheries against each impact area of the SJI. These species were selected due to their increasing vulnerability, related to issues such as overfishing, quota disputes and illegal, unreported and unregulated (IUU) fishing. Ensuring full supplier participation in the SJI is critical to adopting coordinated, ecosystem-based improvements across species to address environmental, governance, and human rights risks.

The supply chain data highlights that species performance varies by context, with different species excelling in different areas, revealing unique risks across supply chains. Tackling challenges on a species-by-species basis can result in fragmented action and can often overlook broader, system-wide risks such as climate-induced impacts or geopolitical conflicts. By aligning species-specific improvements with ecosystem-based approaches within the SJI, retailers and suppliers can reduce exposure to unforeseen risks, and strengthen resilience across product lines to increase long-term availability.

Although mackerel has the strongest overall performance against the SJI, it scored poorly on stock management and onboard monitoring, exposing retailers to risks of overfishing and possible lack of compliance with regulations. By disregarding scientific advice, mackerel-fishing nations have set catch quotas that are too high and lead to overfishing.¹⁰⁷ As a result, retailers are at risk of having to delist Atlantic mackerel and seek alternative sources. Tuna performed well against health of stocks for fish biology, but climate reporting and governance remained weak, highlighting the limitations of certification when it comes to safeguarding human labour rights. Nephrops shows strong supply chain actions, including traceability and advocacy, yet has low climate performance.





BUILDING RESILIENCE - THE PARTIES TO THE NAURU AGREEMENT

The Parties to the Nauru Agreement (PNA) represents a coalition of eight Pacific Island nations that collectively manage 25% of the world's tuna,¹⁰⁸ providing a real-world example of the SJI approach in action. Rather than pursuing certification for individual fisheries, the PNA addresses systemic environmental and social drivers, integrating policy, regulation and monitoring to achieve sustainability goals, promoting ecosystem resilience and equitable benefits across communities.

Integration of the seafood jurisdictional principles is key to the success of the PNA. Coordinated policy and governance (e.g. a vessel day scheme and unified licensing) in PNA waters has maintained stable tuna catches compared to high seas areas.¹⁰⁹ These measures minimise regulatory conflicts and illegal fishing, and support stable government revenue. Meanwhile, integration of sustainability standards (e.g. MSC certification and bycatch management) promotes sustainable practices across the whole region.

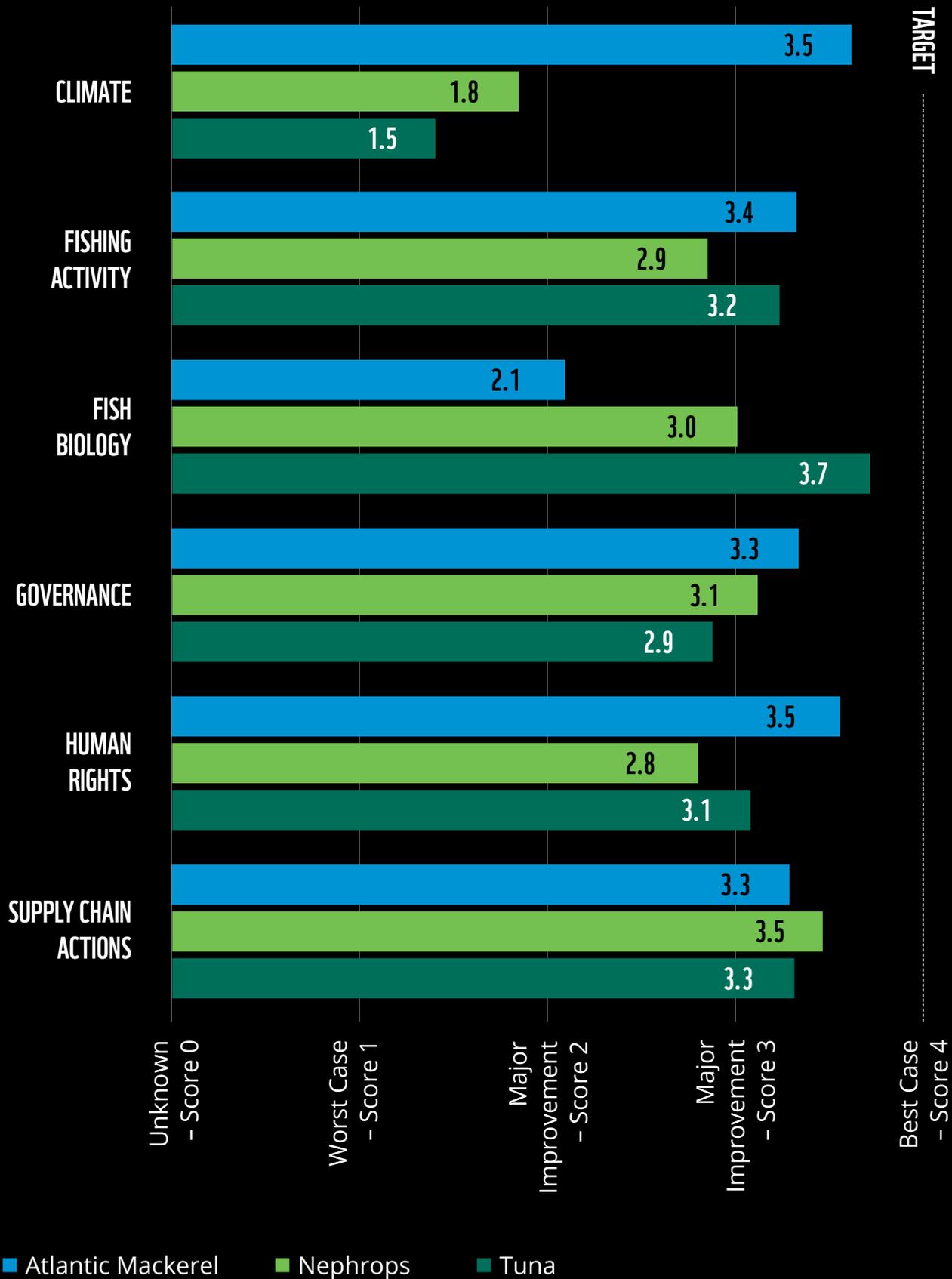
Finally, market and supply chain integration (e.g. centralised marking and traceability) reduces dependence on single buyers, preventing IUU fishing and disruption risk.

The PNA's SJI demonstrates that coordinated, jurisdiction-wide governance can stabilise seafood supply, protect ecosystems, and strengthen economic and social resilience, providing a replicable model for sustainable fisheries globally. Sourcing from fisheries aligned with this approach – rather than relying on improvements at the level of individual vessels or fisheries – increases the resilience of retailers' supply chains. To strengthen long-term resilience, retailers should engage with wider stakeholders, particularly governments, and invest in improvements and regulatory measures that support communities, ecosystems and supply chains to cope with shocks.





AVERAGE SUPPLIER PERFORMANCE AGAINST SJI CHECKLIST



% FEED INGREDIENTS CERTIFIED

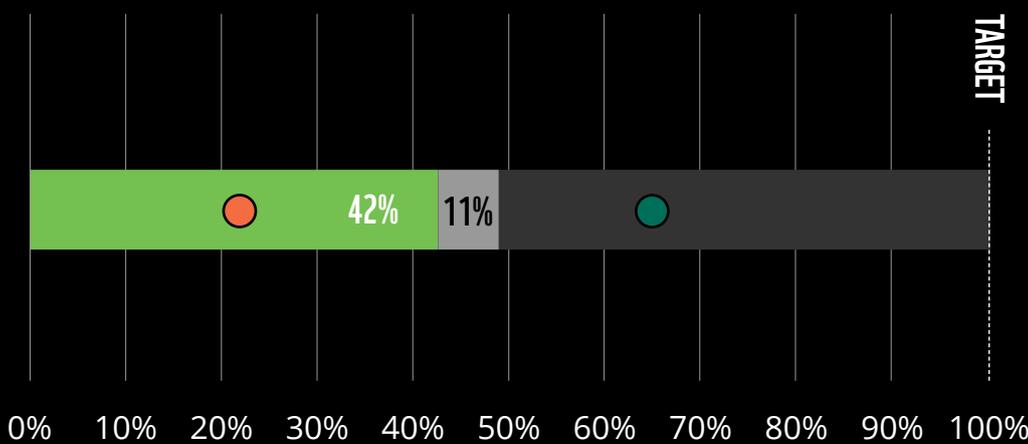
The rise in farmed seafood production¹¹⁰ heightens demand for aquafeed, which presents its own sustainability challenges due to its reliance on natural resources. For example, farmed salmon, currently the top selling species within UK seafood supply chains, relies on aquafeed with a particularly high environmental footprint, largely due to its dependence on wild-caught fish for fishmeal and fish oil, as well as forest-risk crops like soy. Together, these feed inputs contribute to overfishing, deforestation and GHG emissions.

For the first time, WWF can report on the certification of feed ingredients thanks to increased transparency from retailers. Certification represents the minimum safeguard for sustainable aquafeed, ensuring that raw materials

used are sourced in ways that minimise environmental and social impacts. However, average coverage across retailers remains below 45%, although this is expected to increase as aquafeed certification is adopted more widely across seafood supply chains.

THE RISE IN FARMED SEAFOOD PRODUCTION HEIGHTENS DEMAND FOR SUSTAINABLE AQUAFEED

% FARMED SEAFOOD PRODUCTS WITH CERTIFIED FEED INGREDIENTS



5/10

RETAILERS REPORTED

- Average Certified
- Average Non-Certified
- Average Unknown
- Highest Performer
- Lowest Performer



% OF FARMED SEAFOOD PRODUCTS WITH FFDR (FFDRM AND FFDR0) <1

Ingredient-level assessment of aquafeed allows retailers to identify high-impact components, particularly fishmeal and fish oil. This insight can inform interventions such as increasing the use of fishery by-products (trimmings), which helps reduce pressure on marine ecosystems.

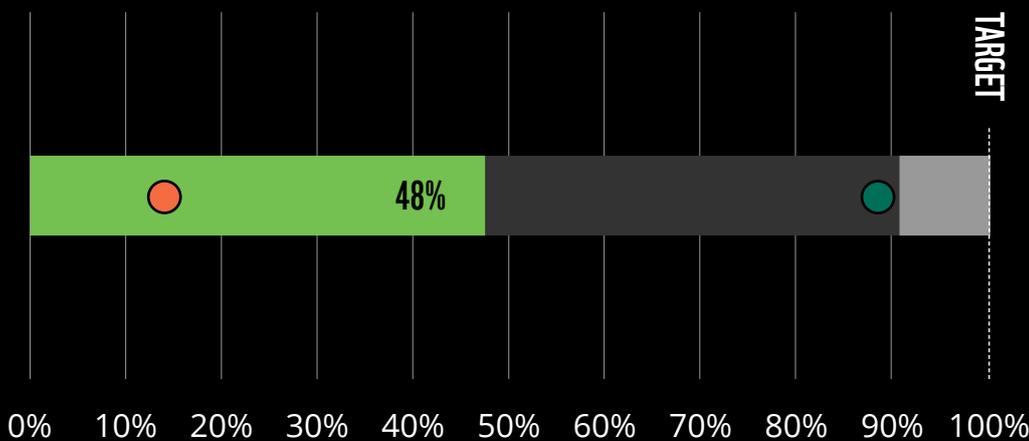
The forage fish dependency ratio (FFDR) is a key measure of how much wild fish is used to produce farmed fish. 2025 is the second year an assessment has been done on the proportion of retailers' farmed seafood sourcing with an FFDR benchmark of less than one. While the 2024 data was limited by gaps, this year's reporting applied stricter criteria, excluding retailers with inconsistencies, which made comparisons to last year difficult. In any

case, the retailers' average is less than 50%, demonstrating that significant progress is required to reach the 2030 target.

FFDR represents only one aspect of feed sustainability. Other ingredients, such as soy and krill, must also be assessed for their source, origin and sustainability credentials to ensure aquafeed is not driving deforestation, biodiversity loss or social conflict.¹¹¹

ALL INGREDIENTS MUST BE ASSESSED FOR SUSTAINABLE SOURCING

% FARMED SEAFOOD PRODUCTS WITH FFDR (FFDRM AND FFDR0) <1



5/10

RETAILERS REPORTED

- Average retailer performance
- Staus Unknown
- Distance to go
- Highest Performer
- Lowest Performer





KEY ACTIONS

2025 MILESTONE

Conduct an audit against each area of the SJI checklist within all seafood supply chains.

2025 MILESTONE

Develop and publish a plan and sourcing strategy to achieve meaningful progress across all six areas of the SJI checklist by 2030.

2025 MILESTONE

Engage suppliers to increase the proportion of branded and own-label seafood that is covered by certification schemes.

2026 MILESTONE

Work with and incentivise suppliers to achieve full supply chain traceability from catch to consumer, and move towards zero reports of IUU fishing for all wild-caught seafood.

See [WWF's Blueprint for Action](#) for further details.





FOOD WASTE



WHY FOCUS ON FOOD WASTE?

Food waste in the UK is responsible for roughly 16 million tonnes of GHG emissions, while land use associated with food wasted on UK farms amounts to 9,600 km² per year, equivalent to almost half the land in Wales.^{112,113} It is an operational inefficiency that increases the immense pressure on natural resources needed to produce food even further. By doing so, it amplifies supply chains' exposure to environmental risks, such as droughts and floods driven by climate change.¹¹⁴ Addressing food waste is therefore not only a climate mitigation strategy, but a resilience strategy to secure a stable food supply and shield against potential supply chain disruptions caused by climate change and nature degradation.

Although their direct contributions to food waste are low in comparison to other stages of the supply chain,¹¹⁵ retailers – sitting as they do at the intersection between producers and consumers – are instrumental in tackling food waste from farm to fork. Retailers set the specifications to which farmers produce, run the logistics that bring products to consumers, and influence consumer behaviour through pricing and product placement.

An estimated 6.9 billion meals' worth of edible food is wasted on UK farms each year,¹¹⁶ placing unnecessary strain on food production volumes to ensure nutrition security for a growing population. This pressure is exacerbated by the impact of climate change on yields.¹¹⁷ Meanwhile, over-production increases the impact of farming on climate and nature. As such, reducing food waste is pivotal to creating a resilient and sustainable food supply now and in the future.

FOOD WASTE IN THE UK IS RESPONSIBLE FOR ROUGHLY 16 MILLION TONNES OF GHG EMISSIONS

2030 OUTCOME	RETAILER PROGRESS MEASURE
Reducing food loss and waste in all aspects of the supply chain by 50%	% reduction in retail & manufacturing food waste
	% of products adhering to WRAP's best practice labelling guidance
	% sourcing from protein, produce & grain farms monitoring food loss & waste





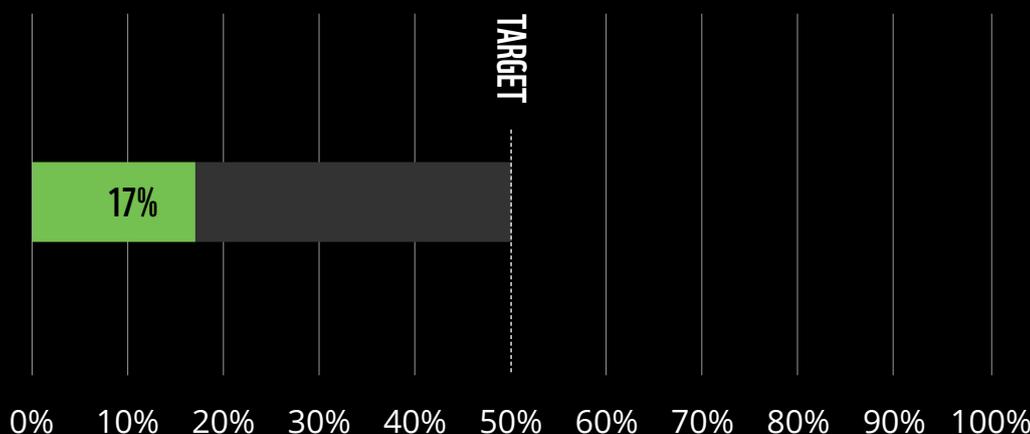
% REDUCTION IN RETAIL AND MANUFACTURING FOOD WASTE

Retail and manufacturing food waste amounts to 15% of food waste, by weight, in the UK.¹¹⁸ This year, due to a lack of recent manufacturing data, only retailer-stage food waste is reported for this measure. There has been a 17% reduction in retailer food waste compared to the 2007 baseline, but only a slight improvement – an additional 2% reduction – since 2024. The progress made by each retailer varies: six retailers reported marginal increases in food waste, whereas four reported a reduction. While WWF acknowledge that progress is not linear, given the stalling of progress in recent years, it is clear that retailers are off-track and need to increase the pace to achieve food waste goals.

Preventing surplus and food waste remains as a primary objective, with redistribution as the next priority.

By continuing to develop circular economy initiatives, retailers can not only reduce their food waste but contribute to both environmental and social resilience. For instance, the Alliance Food Sourcing programme, led by the IGD, FareShare and the Felix Project, works across the food supply chain to identify and divert sources of surplus food in all forms. The coalition brings together suppliers and food retailers to bridge the gap between food waste and food insecurity in the UK. As part of this project, Waitrose has worked with its own-label pasta supplier to divert approximately 130 tonnes of surplus pasta per year, the equivalent of 350,000 meals. Not only will this provide a staple food product to people facing food insecurity, but it can also reduce the GHG emissions associated with food waste.¹¹⁹

% REDUCTION IN RETAIL FOOD WASTE



10/10

RETAILERS
REPORTED

■ Average retailer performance ■ Distance to go

% OF PRODUCTS ADHERING TO WRAP'S BEST PRACTICE LABELLING GUIDANCE

Every year, UK households throw away around 6 million tonnes of food and drink – often because items have passed their “Use By” date.¹²⁰ Changing how food is labelled can support consumers to make better use of their purchases, potentially reducing food waste by at least 350,000 tonnes per year.¹²¹ For example, only applying “Use By” dates when required for food safety, providing clear instructions on storing food, and giving advice on serving sizes can all steer consumers towards making the most of edible food parts.

Quantitative data is not available for any retailers who do not currently monitor their use of labelling guidance. In lieu of this, eight retailers provided qualitative responses to questions around their policies on storage advice, open life statements (i.e. guidance on when to consume food after packaging has been opened), date labels, and if they are using any key performance indicators to measure progress.

Most retailers reported that they have removed or are in the process of removing open life statements unless needed for food safety reasons. Tesco, for example, has removed open life statements from hard cheese and yogurt.¹²² Additionally, some retailers have shared that they are either setting up a labelling audit or using a benchmark tracker or dashboard to review their products. WWF recognises that current government guidance is conflicting, and WWF encourages government to align guidance across food safety and food waste within the mandatory food waste reporting framework.

% SOURCING FROM PROTEIN, PRODUCE & GRAIN FARMS MONITORING FOOD LOSS & WASTE

Food waste at the farm stage represents over 25% of food loss and waste in the UK.¹²³ Contributing 6 million tonnes of CO₂e per year, these losses have a huge environmental impact as a result of the water, fertiliser and land used to produce the wasted food. Tackling farm-level food waste not only delivers benefits for resource efficiency, but also supports farm resilience by providing a 20% average increase in profitability for farmers.¹²⁴

Engagement with the supply chain to tackle farm waste is critical, and it is positive to see some retailers encouraging their own-label suppliers to sign up to the [Food Waste Reduction Roadmap](#). However, data and measurement improvements are essential to enable the identification of drivers of farm-level waste – and solutions to them. Despite some retailers reportedly engaging with farmers to measure food waste, no UK retailer has supplied data against this metric.

There are tools available that retailers could implement in their supply chain so that farmers can easily measure and communicate what is being left behind and why, such as the [Global Farm Loss Tool](#). Walmart and WWF-US have carried out a pilot study with strawberry growers, demonstrating that this tool provides the categorical and accessible data at the farm level to implement practical solutions that can reduce losses at scale. Being able to use more of the harvest also improved the quality of the fruit for the remainder of the season due to less pest pressure, and helped to reduce pesticide use (by up to 30% in some cases). These improvements not only lessen the environmental impact of farming, by reducing resource intensity and minimizing loss and waste, but also strengthen social resilience by helping farmers better withstand market volatility.





KEY ACTIONS

2025 MILESTONE

Engage suppliers constituting at least 70% of the value of retailers' produce, grain and protein sales on food loss and waste, and encourage them to adopt "Target, Measure, Act".

2025 MILESTONE

Government must introduce mandatory food waste reporting and bring best practice in food waste reduction into legislation.

2025 MILESTONE

Implement the Food Waste Hierarchy throughout the business, including enabling redistribution of surplus food through simplified and aligned approvals.

2025 MILESTONE

Best practice in food labelling is followed for all own brand products.

See [WWF's Blueprint for Action](#) for further details.





PACKAGING



WHY FOCUS ON PACKAGING?

As an everyday touchpoint for households, packaging remains one of the most topical sustainability issues for consumers. Packaging is associated with the pervasive problem of plastic pollution, acknowledged by the UN Environment Programme as posing significant environmental, social, economic and health risks,¹²⁵ and continues to be a focal point for NGO campaigns, the public and the media. While global talks on a treaty to end plastic pollution are ongoing, WWF takes a broader view – addressing all types of packaging and recognising that environmental impacts arise across entire supply chains and are driven above all by our excessive use of natural resources.¹²⁶ Resource depletion increases risks to resource security and resilience for governments and businesses.

UK policy measures like packaging extended producer responsibility (pEPR) and deposit return schemes aim to reduce the risk of material losses in the system by

increasing recycling and improving the quality of recovered resources. However, deeper systemic change is needed to build resilience. The Government's Circular Economy Taskforce for England, established in 2024 alongside the individual devolved nation strategies, recognises that a circular approach to resource use can contribute to the UK's net-zero targets, mitigate supply chain risks, enhance resource security and unlock economic opportunities.¹²⁷

DEEPER SYSTEMIC CHANGE IS NEEDED TO BUILD RESILIENCE

2030 OUTCOME	RETAILER PROGRESS MEASURE
100% recyclable packaging	% packaging that is recyclable
40% reduction in material use	% reduction in packaging by weight
All materials sustainably sourced and use of recycled content maximised	% packaging that is recycled content or sustainably sourced





% PACKAGING THAT IS RECYCLABLE

Ensuring that packaging is easily and efficiently recyclable is crucial for increasing recycling rates in line with industry and government targets, providing a valuable source of secondary materials and therefore reducing our food system's reliance on virgin materials.

This year's data paints a similar picture to 2024, with overall packaging recyclability remaining high at 96% (including materials collected via takeback schemes), thanks to pEPR driving change. However, a closer look reveals a shift: recyclability via household kerbside collections has declined by 5%, from 92% to 87%. In contrast, the proportion of packaging recyclable via takeback schemes has increased from 4% to 9%. This increase is likely underpinned by the retailers enabling soft plastics recycling via takeback at stores.

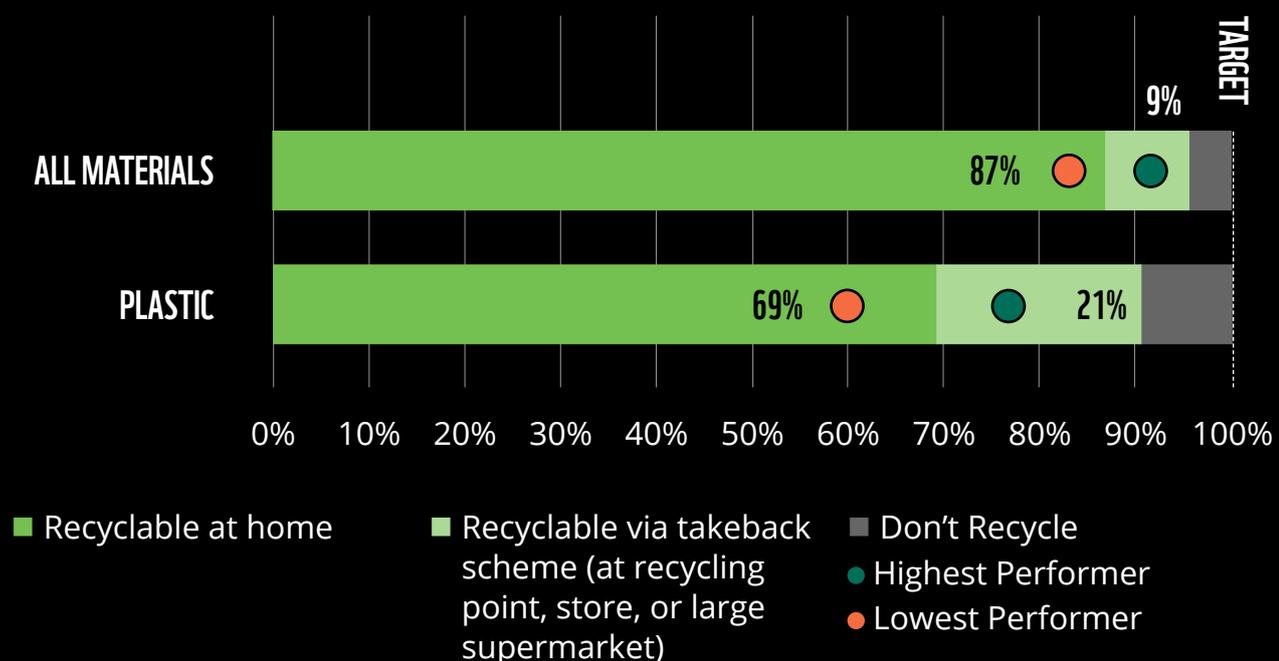
The decrease in kerbside recyclability shown here is likely due to the exclusion of branded packaging data in this year's reporting, since 100% recyclable packaging

– such as heavy glass bottles in the beers, wines and spirits category – is dominated by branded products.

Regarding plastics recyclability, this year's data shows a 3% increase in kerbside recyclability, from 66% to 69%. Overall recyclability – including materials collected through takeback schemes – stands at 89%, a 1% decrease compared to 2024. As mentioned above, hard-to-recycle soft plastics continue to be collected via takeback schemes in advance of the planned introduction of kerbside collections in 2027. However, pEPR is already disincentivising the use of these materials due to higher fee eco-modulation.

Looking at the broader context of recycling in the UK, a gap remains between the recyclability of packaging reported by retailers and the actual recycling rates reported by the ONS. Provisional data for 2024 indicate that between 64% and 75% of packaging waste was recycled,¹²⁸ highlighting a 20-30% gap between what

% OWN-LABEL PRIMARY PACKAGING THAT IS RECYCLABLE



is reported as recyclable and what is actually recycled. It has to be recognised that producers are playing their part in ensuring packaging is recycle-ready for when the system catches up.

% REDUCTION IN PACKAGING BY WEIGHT

A systemic shift towards a circular economy is essential to address the UK's overconsumption of packaging resources. This requires efforts to eliminate and reduce packaging use, alongside collective action to support the adoption of reuse and refill systems where appropriate. Encouragingly, momentum around reuse and refill is building. Recent studies – such as the UKRI-funded A 30%+ Reuse Future for the UK report by GoUnpackaged¹²⁹ – highlight the broad opportunities that can be unlocked by leveraging the current value chain infrastructure to facilitate reuse and refill initiatives.

Furthermore, WRAP's recently announced [UK Packaging Pact](#) – an evolution of the UK Plastics Pact that now encompasses all

packaging materials – includes a specific goal to scale up reuse and refill. Alongside this is the recent establishment of the Reuse Packaging Partnership, supported by nine UK retailers, with the goal “to enable greater consumer participation in a circular economy by exploring how reusable packaging - with a focus on prefill - can be implemented through interoperable systems.” Initiatives like these can further support the ambition to drive down material usage and contribute towards the 40% overall material reduction target.

The UK's Extended Producer Responsibility scheme requires brands and retailers to provide more detailed and potentially proprietary information on their packaging. One retailer has noted that brands are less willing to share this level of detail and therefore the level of information they hold on branded packaging is not as complete as previously. This means it is not possible to measure the overall change in their packaging footprint in comparison to 2018 based on currently available data.





% PACKAGING THAT IS RECYCLED CONTENT OR SUSTAINABLY SOURCED

Using recycled content is an important building block for a circular economy and to reduce reliance on virgin resources. Where virgin materials are needed, sourcing them sustainably is crucial to limit harm to nature and communities caused by unsustainable practices. This year, the average recycled content in retailer packaging across all materials increased slightly from 26% to 28%. Only two retailers achieved over 30% recycled content in plastic packaging – the threshold required to meet the Plastic Packaging Tax criteria.

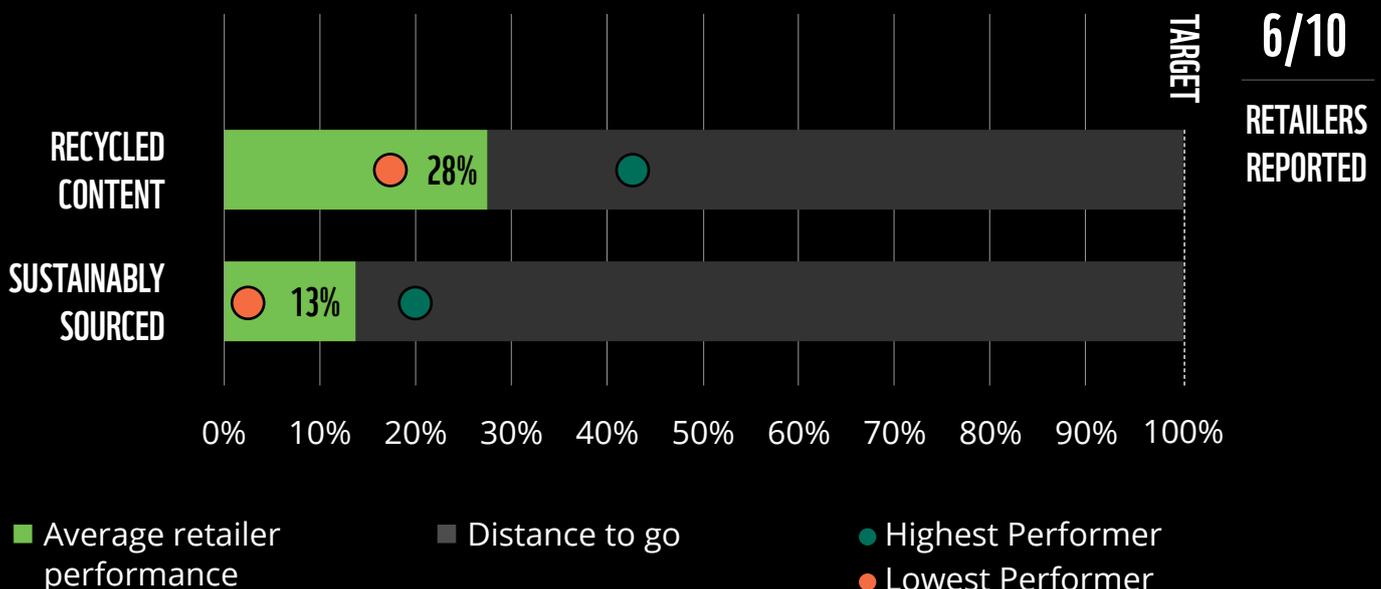
The UK recycled plastic market remains challenging. In 2025, two major UK recycling plants ceased operations due to a combination of factors, including market instability and policy uncertainty, which undermined their financial viability.

Sustainably sourced material this year was reported to comprise 13% of own-label

primary packaging, with reported figures ranging from 2% to 20%.^{vi} This represents an increase in comparison to last year, where fewer retailers were able to provide data on the sustainable sourcing of material – and as such, only 6% of own-label primary packaging was reported to be sustainably sourced. Only one retailer – the Co-op – reported using ASI-accredited aluminium, and several retailers still did not report on recycled or sustainably sourced content. Revisions to last year’s reporting criteria revealed ongoing gaps in retailers’ data systems. Combined with new pEPR requirements, this is driving efforts to improve data collection and reporting.

Further efforts are required to define what sustainable sourcing means for materials such as glass and plastics, with the caveat that this must be robust and evidence-based to avoid misleading consumers.

% PACKAGING THAT IS MADE UP OF RECYCLED CONTENT OR SUSTAINABLY SOURCED



^{vi} The reported figure in last year’s report was 16%; however, this included both primary and transit packaging. Across the packaging measures within this year’s reporting, WWF have chosen to focus on primary packaging, for which data quality was significantly higher.



KEY ACTIONS

2025 MILESTONE

Put data systems in place to enable accurate reporting on material tonnages and sustainable sourcing, with the latter clearly defined for each material.

2025 MILESTONE

Commitment to collaborate as part of industry packaging initiatives such as WRAP's UK Packaging Pact and The Reuse Packaging Partnership.

2025 MILESTONE

Have in place a time-bound waste minimisation roadmap (aligned with the Environment Act target of 50% reduction in residual waste) and a plan to reduce material use in packaging, supported by reuse targets.

2026 MILESTONE

Engage with all suppliers on the requirements of the revised packaging strategy.

2026 MILESTONE

Robustly quantify GHGs from packaging and develop actions to reduce them.

See [WWF's Blueprint for Action](#) for further details.



SUMMARY

This year's What's in Store for the Planet report not only re-emphasises the need for a full system transformation across seven key impact areas, but also highlights the importance of building resilience throughout the supply chain.

The risk of inaction is clear. The UK food retail sector is at a turning point where its future viability hinges on addressing a complex network of both environmental and social risks. Disruption caused by climate change, resource scarcity and market shocks is being experienced throughout each area of the WWF Basket, demonstrating that without decisive action, environmental impacts will escalate, increasing food insecurity and volatile pricing.

Building resilience demands a shift from ad-hoc initiatives to systemic transformation. Retailers must weave climate and nature into their strategies and purchasing decisions, whether that is by investing in nature-friendly farming at scale, advocating with the government for robust regulation and policy incentives, or engaging with suppliers to implement robust DCF soy standards across supply chains.

Earlier this year WWF-UK provided retailers with a suggested [pathway of actions](#) needed to achieve these targets – how will they rise to the challenge?



ENDNOTES

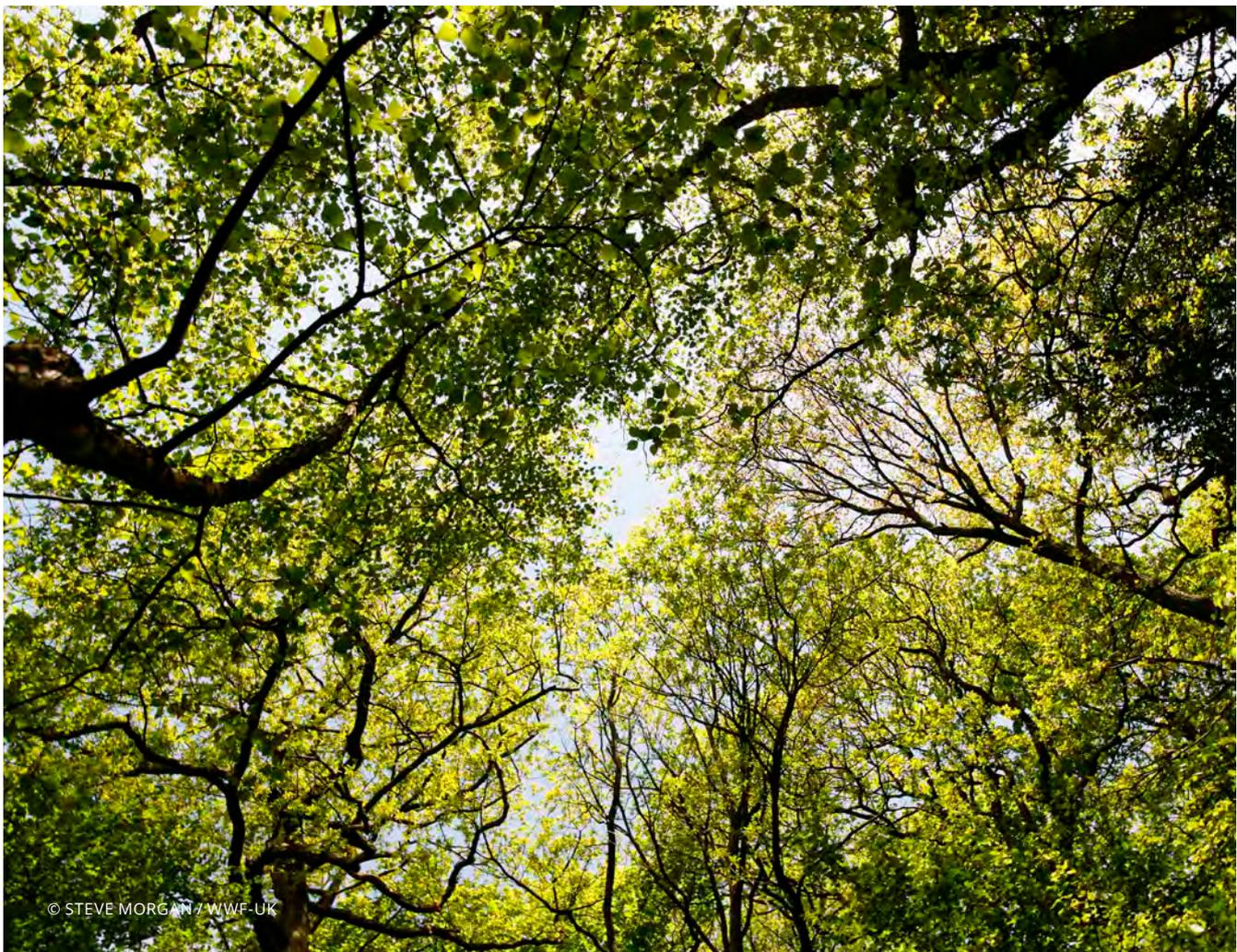
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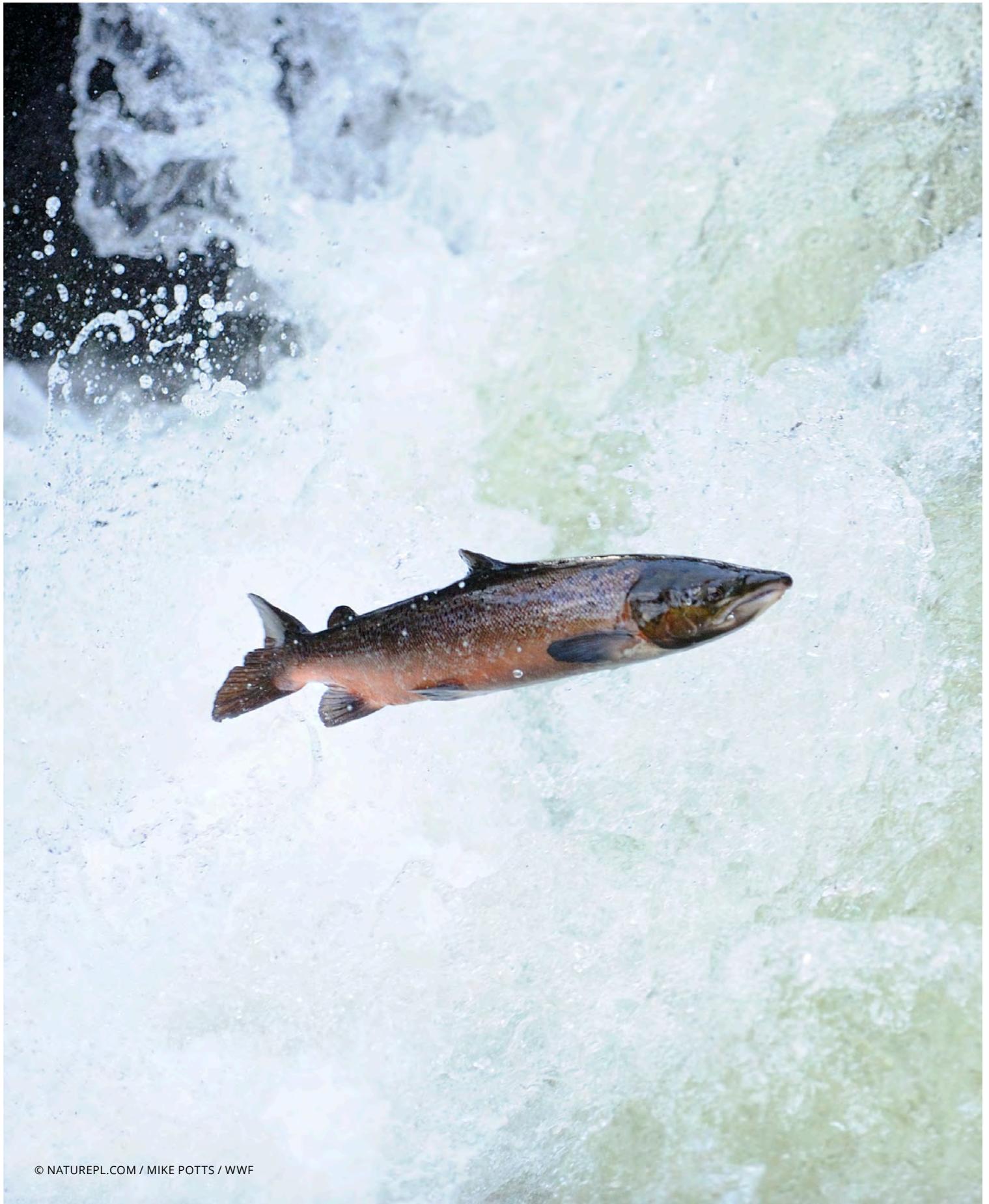


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