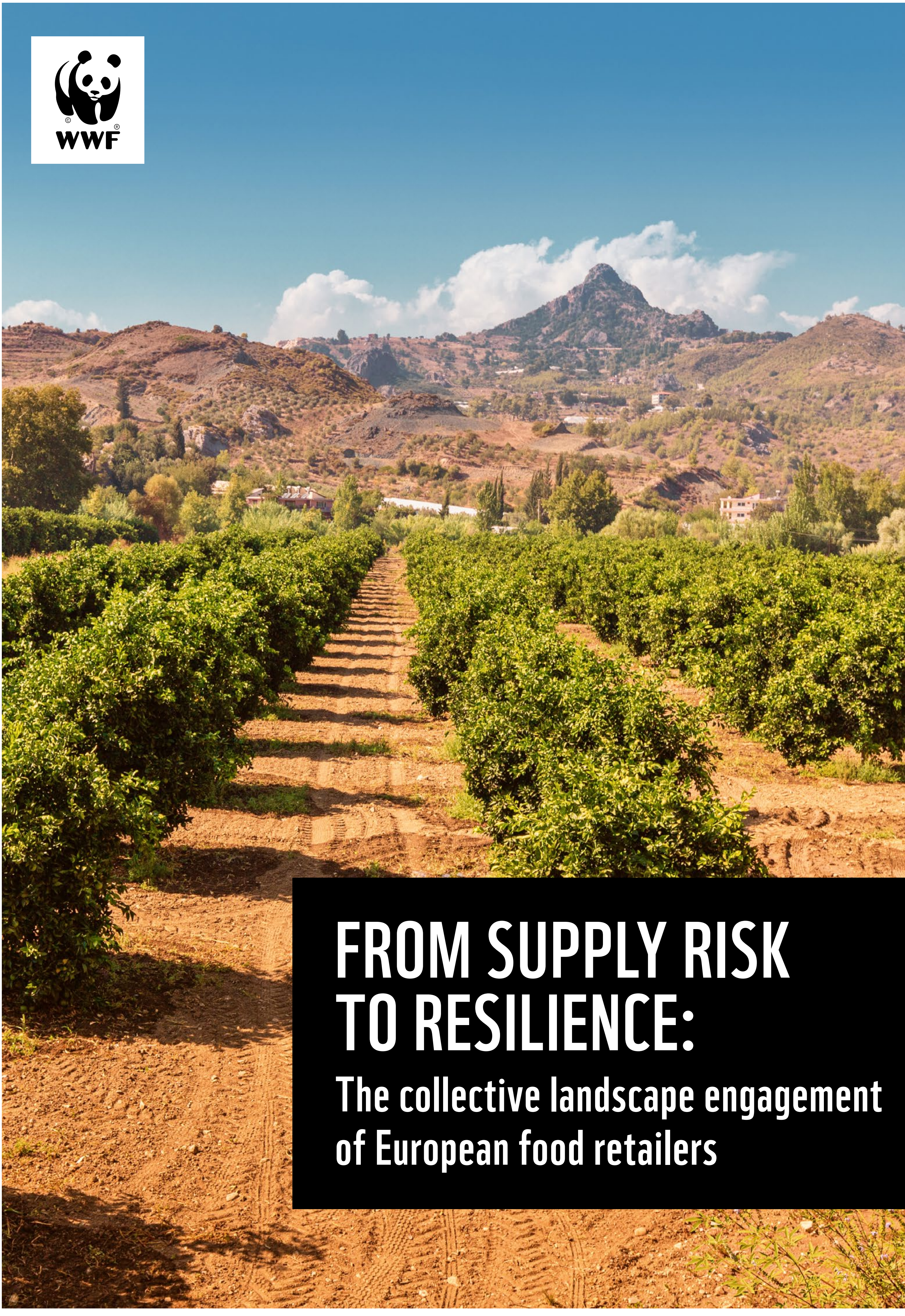

FROM SUPPLY RISK TO RESILIENCE:

The collective landscape engagement of European food retailers

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Authors	Florence Wiggins, Caitlin McCormack, Livia Barreca, Emily Scott (all: 3Keel) in collaboration with: Sylvia Meyer (WWF Switzerland), Aurélie Stamm (WWF Switzerland) and Christian von Loewenich (WWF Germany) and with the collaboration of: Sabrina Peer (WWF Austria)
Coordination	Christian von Loewenich (WWF Germany)
Contact	WWF Germany: Christian von Loewenich, Christian.vonLoewenich@wwf.de WWF Austria: Sabrina Peer, Sabrina.Peer@wwf.at WWF Switzerland: Aurélie Stamm, Aurelie.Stamm@wwf.ch Sylvia Meyer, Sylvia.Meyer@wwf.ch
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CONTENTS

LIST OF ABBREVIATIONS

AFi	Accountability Framework initiative
AWS	Alliance for Water Stewardship
CALP	Collective Action Landscape Project
CDP	Carbon Disclosure Project
CEO	Chief Executive Officer
CSDDD	Corporate Sustainability Due Diligence Directive
CSRD	Corporate Sustainability Reporting Directive
ESS	Environmental Sustainability Solution (GlobalG.A.P.)
ESRS	European Sustainability Reporting Standards
FPIC	Free, Prior and Informed Consent
GlobalG.A.P.	Global Good Agricultural Practices
HICL	High Impact Commodity List (SBTN)
IBAT	Integrated Biodiversity Assessment Tool
ISEAL	International Social and Environmental Accreditation and Labelling Alliance
KPI	Key Performance Indicator
LEAP	Locate, Evaluate, Assess, Prepare (TNFD approach)
MRV	Monitoring, Reporting and Verification
NGO	Non-Governmental Organisation
SBTN	Science Based Targets Network
SIFAV	Sustainability Initiative Fruit and Vegetables
TNFD	Taskforce on Nature-related Financial Disclosures
WRAP	Waste and Resources Action Programme

EXECUTIVE SUMMARY

Collective action at the landscape scale is critical for the scale, scope and speed required to address shared water and biodiversity challenges. There are particular opportunities to use **collective action landscape projects (CALPs)** in fruit and vegetable supply chains, in part because of their high exposure to water and biodiversity risks (e.g. highly water intensive production processes), but also because of their high traceability compared to supply chains for commodities such as soy, palm oil, cocoa and coffee.

For retailers, engaging in CALPs can be part of an effective strategy to reduce exposure to supply chain shocks; collaboration with peers can enhance the resilience of key sourcing landscapes. As retailers frequently source fruit and vegetable commodities from the same high-risk sourcing regions, such collaboration can produce meaningful impacts.

This report details findings from engagement with ten retailers across Switzerland, Austria and Germany to understand the current extent of engagement in CALPs, and the main opportunities and barriers to retailers' engagement. We find retailers are increasingly 'ready to invest' in projects, with a growing understanding of key areas of supply chain risk and the **EU Corporate Sustainability Reporting Directive (CSRD)**[1] driving an increased focus on 'risk and resilience' across supply chains. However, there remains a gap in retailers' engagement in CALPs to the scale and extent required to impact resilience within fruit and vegetable supply chains.

Retailers face challenges in CALP implementation, including barriers to collaboration, lack of standardisation in approaches to implementing CALPs and reporting impact, uncertainty of the extent and scale of engagement required, and issues with gaining internal buy-in for projects. Retailers are largely reliant on NGOs and collaborative platforms to manage and drive projects, which can limit the scale and impact of action.

1 The Corporate Sustainability Reporting Directive (CSRD) is an EU regulation requiring companies to reporting according to the European Sustainability Reporting Standards (ESRS), including information on the impact of a company's activities on the environment

This report provides a series of recommendations to retailers, as well as 'enabling environment' stakeholders (NGOs, policymakers, collaborative platforms, other supply-chain actors) to better deliver on CALPs in fruit and vegetable supply chains, invest in landscape scale resilience and support the future of resilient supply.

The recommendations in this report fill three core gaps in enabling CALPs to scale:

Prioritise action in areas of highest risk, to maximise efficiency per investment

Increase collaboration between all relevant stakeholders including between retailers, across the supply chain, and with NGOs, collaborative platforms, standard developers and policymakers

Create standardisation in approaches for CALP implementation, management, monitoring and reporting

1 INTRODUCTION

1.1 PURPOSE AND CONTEXT OF THIS WORK

Water and biodiversity are fundamental, not only for healthy ecosystems, but also for our economies and well-being. Fruit and vegetable production is at particularly high risk from water scarcity, water contamination and biodiversity loss as production processes are often water intensive and dependent on biodiversity for ecosystem services (e.g. pollination services and disease control). These risks are magnified due to high-production regions of fruit and vegetables also being areas of high environmental risk. For example, Peru is a major exporter of avocados but production is at risk due to drought and high temperatures in key production regions.[2]

Water and biodiversity risks affecting fruit and vegetable production are a growing risk to retailers, with increasing evidence of disruption to security of supply. For example, orange juice prices have risen to record levels following five years of poor orange crops due to severe drought and disease.[3] Water and biodiversity risks are increasingly disrupting production across multiple regions and commodities. 'Quick fix' solutions such as changing sourcing regions are unlikely to mitigate risk and may exacerbate supply chain risk by moving production to new regions, which may become a 'new frontier' of risk.

2 Juan Carlos: "Peru's 2023 Avocado Season at Risk due to Drought and High Temperatures". Tridge (2023), https://www.tridge.com/stories/perus-2023-avocado-season-at-risk-due-to-drought-and-high-temperatures

3 Faisal Islam: "The £5.30 orange juice that tells the story of why supermarket prices are sky high". BBC News (2025), https://www.bbc.co.uk/news/articles/c397n3jl3z8o

Collective action at the landscape scale can build meaningful resilience amongst retailers to water and biodiversity risks across key sourcing regions. Collective action—between retailers, producers, upstream supply-chain actors, NGOs and local communities—can help pool resources and share costs, develop shared goals, and increase the scale of impact in at-risk landscapes.[4] Collaboratively addressing risks at the landscape scale will deliver on-farm production benefits, as biodiversity and water outcomes are not restricted to farm boundaries.

Collective action at the landscape scale can build meaningful resilience amongst retailers to water and biodiversity risks across key sourcing regions.

Retailers' engagement in collective action landscape projects (CALPs) is critical to achieve supply chain resilience across sourcing landscapes. Fruit and vegetable commodities are a useful starting point for CALP implementation. Typically fruit and vegetable supply chains have greater transparency and traceability than other traded commodities, such as soy and palm oil, as they are minimally processed, bought fresh, and used directly for human consumption. Shorter supply chains in fruit and vegetables helps with common traceability challenges, meaning sourcing landscapes can be more easily identified. Investing in known sourcing landscapes can maximise impact for supply chain resilience.

This report evaluates the current engagement of ten European retailers[5] in CALPs that address water and biodiversity challenges in fruit and vegetable supply chains, based on a desk review and direct engagement with retailers through a survey and interview. The report identifies barriers and drivers to retailers' engagement in CALPs and provides recommendations for retailers, as well as for 'enabling environment' stakeholders, to catalyse further engagement.

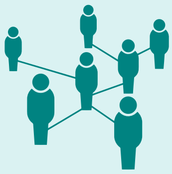
4 Matthew Spencer: "The answer to rising agri-food supply risks? Get horizontal with your peers". IDH (2025), https://idh.org/news/the-answer-to-rising-agri-food-supply-risks-get-horizontal-with-your-peers

5 Operational in Austria, Germany and Switzerland; see Scope below

1.2 SCOPE

The scope of this project is CALPs within fruit and vegetable supply chains, focusing on water and biodiversity risks. Information has been gathered from engagement with ten retailers based in Germany, Austria and Switzerland.

To be in-scope, CALPs must meet the following criteria:



01. Collective

A coordinated set of engagements between one or more retailers and a wider multi-stakeholder group, such as farmers, cooperatives, agribusiness, NGOs, governments or financial institutions. Projects pool together knowledge resources and/or expertise to jointly identify and implement solutions.

02. Landscape scale

Actions and objectives take place at a broader watershed or landscape level, and may take place across one or multiple catchments.

The scope of this project is CALPs within fruit and vegetable supply chains, focusing on water and biodiversity risks.

The focus is specifically on CALPs that involve high-impact **fruit and vegetable supply chains** and sourcing hotspots. In-scope fruits and vegetables are defined as fresh, minimally processed fruits and vegetables, primarily used for direct human consumption.[6] Examples include soft berries, avocados, potatoes and tomatoes. Traded commodities such as cocoa, coffee, and palm oil are not in scope. High impact fruit and vegetable commodities were identified from the SBTN High Impact Commodity List (HICL), the supplemental list and the conversion driving commodity list.

Within the identified scope, we focus on CALPS that prioritise **water and/or biodiversity risk**. CALPs that primarily address greenhouse gas emissions or other issues are generally not in scope, but are considered if they have a strong secondary focus on biodiversity or water risk.

6 Tree nuts, seeds, legumes, beans and pulses are considered where whole, minimally processed and for direct human consumption (i.e. not processed for animal feed)

CALPs may take place in areas of known high water and biodiversity risk, or may include regions of lower physical risk if the location is significant in terms of overall sourcing volumes.

In addition, CALPs should take place in a fruit or vegetable sourcing landscape with a known link to retailer value chains, and in a location identified as high risk. High risk areas may include landscapes with challenges such as water scarcity, water quality issues, or biodiversity and habitat loss.

CALPs may take place in areas of known high water and biodiversity risk, or may include regions of lower physical risk if the location is significant in terms of overall sourcing volumes. Projects without a demonstrable value chain connection are still considered as part of the broader assessment approach.

1.3 METHODS

Retailer engagement: survey and interviews

Ten retailers were identified for inclusion in the study by WWF Switzerland, WWF Germany and WWF Austria, based on their location in each of the target countries (Switzerland, Germany and Austria). Some retailers had an existing relationship with WWF around CALPs.

Retailers were invited to participate in the study in June 2025 via a survey and interview. The survey was completed by retailers between June and July, and interviews were held between July and September 2025. While most participated in both, one retailer only participated in the survey and one only participated in the interview. Two retailers did not engage in either so are evaluated based on publicly available information only. A list of the retailers and their level of engagement is in ▸ Appendix A.

Before being sent to retailers, the survey was pre-populated with publicly available information found via internet searches. This was followed by a semi-structured interview conducted online. The interviews focused on gaining greater understanding of of retailers' engagement with CALPs and of associated opportunities and barriers. Retailers were free to state when information should be kept anonymous; this option sought to encourage retailers to be open about progress achieved to date.

Retailer rating

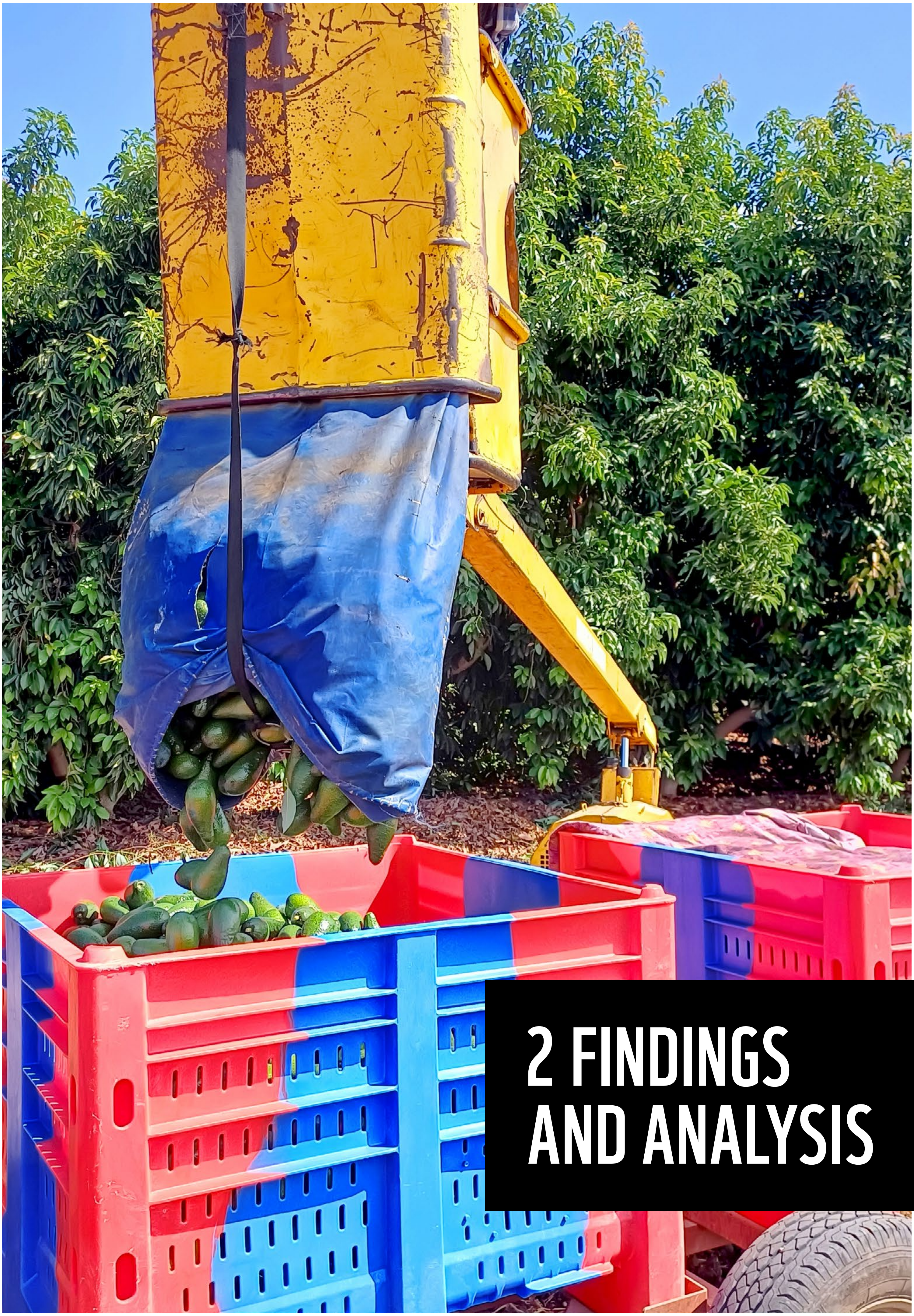
The gathered information was used to assess retailers against evaluation criteria that mapped to the questions in the survey and interview. The criteria cover seven categories for understanding retailers' readiness to engage in CALPs and the strength of their current CALP engagement. A 'best practice' reference point was defined for each criteria, aligned with key standards and disclosure frameworks (SBTN, TNFD, CDP) and existing research defining best practice for CALPs.[7]

An overview of evaluation categories and best practice criteria are outlined in ▸ Appendix B.

Each retailer was rated from low to high on a simple four-point scale, relative to 'best practice' reference criteria.

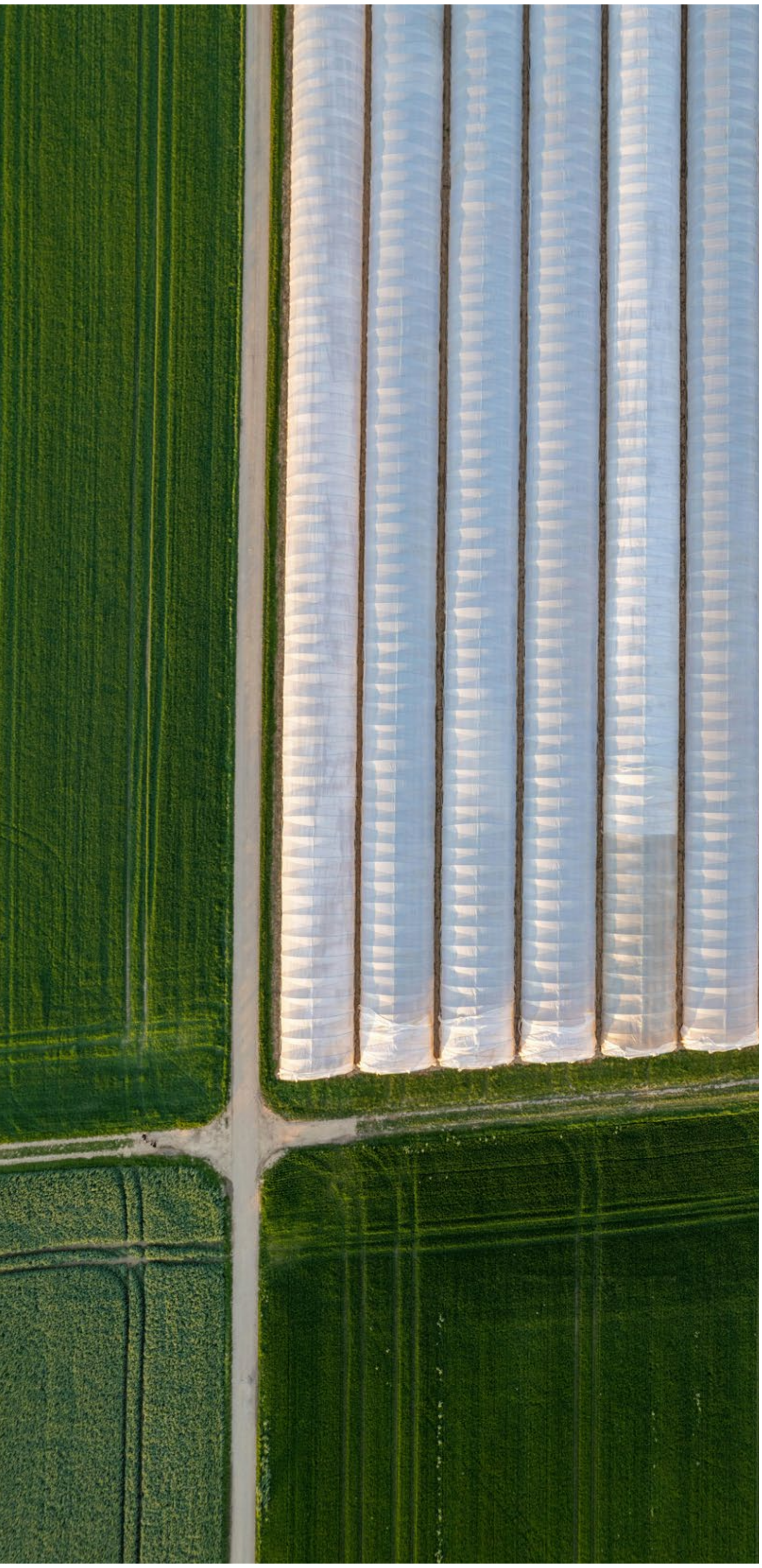
The criteria were updated iteratively throughout the evaluation process, so that they remained relevant to current action amongst retailers, whilst keeping sight of the 'best practice' benchmark. The retailers were asked to confirm any information relating to them to ensure that the information is not misrepresented.

7 Sources include: SBTN steps 1, 2 and 3; SBTN stakeholder engagement guidance; TNFD LEAP approach; CDP, "Meeting Nature Goals: Landscape and Jurisdictional Approaches" des CDP (Carbon Disclosure Project); Landscape approaches; WWF "Unpacking collective action in water stewardship"; Core Criteria for Mature Landscape Initiatives (collective position paper)



2 FINDINGS AND ANALYSIS

2 FINDINGS AND ANALYSIS



2.1 OVERVIEW OF FINDINGS AND ANALYSIS

This section details the engagement of the selected retailers in CALPs on biodiversity and water risks in fruit and vegetable supply chains, using the evaluation criteria outlined in ▸ Appendix B.

Table 1 gives an overview of current retailer activity across evaluation categories relative to a reference 'best practice' level. The detail of the evaluation across these categories is explored in the rest of the section, covering retailers' current engagement in CALPs, their readiness to engage, and the strength of their engagement in current CALP projects. Retailer responses identify several barriers or challenges to engagement with CALPs, as well as potential opportunities for enabling greater engagement. These are mentioned throughout, and covered in more detail in ▸ Section 3 (*Key findings*).

Table 1:
Evaluation of retailers across criteria for engagement in Collective Action Landscape Projects (CALPs) on water and/or biodiversity risk in fruit and vegetable supply chains, relative to a reference best practice level. In the absence of engagement in CALPs, the rating reflects broader efforts on water and/or biodiversity risk in fruit and vegetable supply chains.

		1. Current engagement with CALPs on water and/or biodiversity risk in fruit & vegetable supply chains	2. Understanding of high risk sourcing regions and evaluation of water and biodiversity risks	3. Strategy and targets for CALPs and opportunity mapping	4. Funding and internal resourcing for addressing water and biodiversity risk and for CALPS	5. Engagement in collaborative forums and with partners and peers	6. Engagement with local stakeholders	7. Monitoring, reporting and verification (MRV)
	Best practice reference	Active	Detailed evaluation and strategy for high risk f&v and hotspot regions	Specific strategy and targets on CALPs, and opportunity mapping	Dedicated internal team, senior management engagement, adequate funding / resources	Active in collaborative forums, driving initiatives and recruiting partners	Engages local stakeholders in project design, objectives, risk and benefit sharing etc	Comprehensive MRV aligned with broader goals in the target region, transparent public reporting
Currently engaged	EDEKA	Active						
	ALDI SÜD	Active						
	ALDI Nord	Active						
	Migros	Active						
Previously and/or planning to be engaged	Kaufland	Past + future						
	Coop	Past + future						
	REWE*	Past				No info available		
Not currently engaged and no clear previous engagement	In absence of engagement in CALPs, rating of retailers below reflect broader efforts on biodiversity and water risk in fruit and vegetable supply chains							
	Lidl	No						
	SPAR	No						
	BILLA*	No	No info available	No info available	No info available	No info available	No info available	No info available

Alignment with Best-Practice Reference

n/a Low → High

*REWE and BILLA were contacted to participate in the study but declined or did not respond to the request. This evaluation is therefore based on publicly available online information.

2.2 RETAILERS' CURRENT ENGAGEMENT IN CALPS

Retailers engage in CALPs in different locations, for different reasons, and in response to different pressures.

Currently, four retailers are actively engaged, to some extent, in CALPs (ALDI Nord, ALDI SÜD, EDEKA, and Migros). ALDI SÜD, EDEKA and Migros all mention CALPs as an element of their strategies for addressing risks and impacts linked to fruit and vegetable supply chains. Specific projects mentioned include the WRAP[8] (Waste and Resources Action Programme)-led initiative focused on water management issues linked with berry production in Doñana, Spain, and an initiative with WWF focused on bananas in Columbia and Ecuador (see ▸ Appendix C for a full list of projects retailers are engaged in). While Kaufland are engaged in the AWS collective action accelerator in Spain,[9] this is more limited compared to ALDI SÜD, EDEKA and Migros, who are actively engaged in on-the-ground projects. Several retailers cited projects focused on fruit and vegetable supply chains but which would not fit under the definition of CALPs.[10]

Coop and REWE have been involved in CALPs in the past and Coop are actively considering future engagement. For example, Coop is engaged with WRAP in Huelva, Spain, and developing advocacy work around CALPs.

There were a number of common drivers mentioned by retailers that led to CALPs engagement, summarised in Box 1 and discussed in more detail in ▸ Section 3 (*Key findings*).

Those not engaged in CALPs referenced several key reasons for limited engagement. For example, Lidl mentioned challenges of scalability of impact across landscapes and supply chains as a key challenge to CALPs. For Coop, barriers to internal funding and senior-level buy-in were preventing widespread engagement. Others referenced lack of 'ready made', high quality CALP opportunities, high resource and cost requirements, and lack of standardised processes for reporting outcomes.

8 WRAP collaborates with WWF, food and drink organisations and the rivers trust to implement collective action landscape projects to improve water efficiency, protect ecosystems, and support local communities in project areas.

9 AWS: Collective Action Accelerator, https://a4ws.org/about/collective-action/collective-action-accelerator

10 For example, BILLA supports nature conservation as well as climate and nature education projects through the "Blühendes Österreich" foundation. While these initiatives aim to protect biodiversity at a local level, they do not meet the definition of CALPs, as they lack a landscape-scale approach. As BILLA did not participate in the survey or interviews, this assessment is based solely on publicly available information.

Even for retailers currently engaged in CALPs, there are challenges in identifying new project opportunities and enabling impact to scale. For example, EDEKA have been a funding member of AWS (Alliance for Water Stewardship) since 2016 but are currently finding new project opportunities difficult to identify, especially those relating specifically to biodiversity risks and impacts. Long term engagement is positive and important for building long term relationships and supporting long term change, however this should ideally be carried out alongside actively searching, identifying and engaging with new CALPs to respond to an evolving understanding of landscape risk.

WHEN, WHERE AND WHY RETAILERS ENGAGE IN CALPS

Retailers engage in CALPs in different locations, for different reasons, and in response to different pressures. The following were identified as circumstances where retailers are engaging in CALPs:

- If a sourcing region is the focus of particularly **high consumer pressure or reputational risk.** For example, the Doñana, Spain presents a high reputational risk for retailers sourcing in the region, due to longstanding issues of illegal water and land use, and over-abstraction of water.
- In regions where the fruit and vegetable **market or sector is relatively small**, making it easier to gain traction and get agreement on project implementation, planning and development amongst different stakeholders.
- Where it has been recognised that risks and impacts occur **'beyond the farm gate'**, perhaps following attempts at farm-level action to address them. For example, acknowledgement that water quality and availability issues are driven by action across a watershed and therefore need to be addressed at the same scale.
- Where **well-established projects** currently exist, and the retailer can easily engage in these existing efforts. For example, projects hosted by collaborative forums such as WRAP and AWS.
- CALPs are used as **one measure in retailers' strategies**, alongside standards and certification.

2.3 RETAILERS' READINESS TO ENGAGE IN CALPS

While only half of the overall retailer cohort were actively engaged in CALPs in fruit and vegetable supply chains, retailers were also assessed for their underlying 'readiness' to engage. If retailers have done the ground work to understand risks to the availability of fruit and vegetable products within their own supply chains, upskill internal teams, and gather internal buy-in, then they are more likely to have established conditions for meaningful CALP engagement, and to implement projects with impact. For example, if retailers have carried out risk assessments to identify priority sourcing hotspots for water and biodiversity, they have the knowledge to reduce their impact on water and biodiversity in key sourcing landscapes and protect the resilience of their supply chains. CALPs can be a meaningful opportunity to reduce that sourcing risk in practice.

Retailers were evaluated for 'readiness to engage' across the categories listed below. These categories apply context for engaging in CALPs, but are not specifically about retailers' engagement in CALPs. For some categories (e.g. target setting) more mature retailers will demonstrate CALP-specific action, such as setting targets specifically for CALP implementation and outcomes, and not only for biodiversity and water risks more generally.

The categories in this section are:

- **2.3.1 Understanding of high risk sourcing regions**, including analysis of water and biodiversity risk in fruit and vegetable supply chains
- **2.3.2 Development of strategy and targets to address water and biodiversity risk** in fruit and vegetable supply chains, and whether targets apply specifically to CALPs
- **2.3.3 Internal resourcing** for projects, including specific responsibilities within teams and **senior level buy-in for CALPs, including internal reporting processes and clear KPIs**
- **2.3.4 Engagement in collaborative forums** for addressing water, biodiversity, fruit and vegetable risk, and for CALPs specifically

2.3.1 Understanding of high risk sourcing regions

Criteria	Best practice
Understanding key high risk commodities and associated impacts	▪ Analysis carried out for all identified 'high risk' fruit and vegetables. High risk vegetables and fruits are identified based on external data (e.g. through the SBTN high impact commodity list (HICL)) and internal data (e.g. procurement volumes). ▪ Tools such as the SBTN HICL are used to identify, at a high level, the type of impact associated with the commodity.
Understanding key sourcing regions of high risk commodities	▪ High priority regions are identified to at least the watershed and farm level, with detailed understanding of regional specific challenges. ▪ Tools such as IBAT and WWF Risk Filter Suite are used to understand risk in sourcing regions, associated with production of fruit and vegetable commodities. ▪ Regional risk is cross-referenced with commodity specific risks, to understand materiality of impacts. ▪ Understanding of regional and location specific challenges (e.g. relevant regulatory, cultural or political context).

Retailers mentioned that having a large number of commodities, supply chains and products creates challenges for developing a systematic understanding of risk across their supply base.

Retailers mentioned that having a large number of commodities, supply chains and products creates challenges for developing a systematic understanding of risk across their supply base. Nevertheless, all retailers showed some progress in **identifying risk and impact** in their own fruit and vegetable supply chains (other than BILLA, where no information was available), although this analysis was sometimes high level. Retailers who showed more progress in risk assessment had carried out analysis at the **individual commodity level** for fruit and vegetable commodities identified as highest risk (e.g. avocados, strawberries). For example, Coop used the SBTN high impact commodities list (HICL) to identify highest risk fruit and vegetables (but had not yet started risk analysis on these commodities) and ALDI Nord identified their fifteen highest selling fruit and vegetables by volume to take forward to risk assessment. Others (e.g. Spar) took a more generalised approach to fruit and vegetables as a single category, without yet carrying out commodity-specific analysis.

Generally, **water risk assessment i**s more mature than **biodiversity risk assessment** with retailers referencing a general lower understanding of biodiversity risk, and less confidence in metrics and data for measuring biodiversity risk. This was not a barrier for all retailers, with several, including ALDI SÜD, EDEKA and Lidl, carrying out biodiversity risk assessments across their supply chains.

Traceability to the farm and landscape level remains a challenge for retailers, making it difficult to identify specific locations and landscapes for CALP engagement. Many rely on GlobalG.A.P. numbers and certificates for location data but there was a general need for improved data at the farm level. ALDI SÜD demonstrated efforts to improve traceability, and had carried out a critical analysis of GlobalG.A.P. data and its limitations (e.g. potentially misleading country level data, and traceability limited to suppliers and not specific farm plots).

Potential drivers and opportunities for engagement in CALPs

- Retailers identified that the availability of tools, including the WWF risk filter suite, Global Forest Watch, Soil Grids and Life Cycle Analysis data, support them to carry out supply chain risk assessments, and to access water and biodiversity data.

Key challenges for CALP engagement

- Significant resource and data requirements to carry out assessment across a large volume of supply chains, products and commodities.
- Lack of traceability to the landscape level makes it hard to prioritise sourcing landscapes for CALP implementation.
- Generally, biodiversity risk is less well understood, with lack of data compared to water and climate risk.

2.3.2 Strategy and targets for addressing water and biodiversity risks

Criteria	Best Practices
Internal strategy and targets to address water and biodiversity risks	▪ Targets and strategy in place for addressing water and biodiversity risk, including specific targets for CALP implementation and to track CALP outcomes. ▪ Targets set through SBTN, including development of an SBTN landscape engagement target.

Many retailers were in the process of updating and **developing new strategies for water and/or biodiversity**, often with an increased **risk and resilience perspective** as a result of the CSRD.[11] Retailers were not able to share detailed information on strategies where these were currently under development, but several chose to share information on their direction of travel. Generally, the setting of strategic goals for **water risks** was more mature than for **biodiversity risks** due to the perceived relative complexity and lack of available data for biodiversity.

Certification can be a useful tool for influencing practice and impacts at an individual farm level, but compared to CALPs, represents a 'broad and shallow' approach which has limited impact on addressing context specific, landscape-scale issues and risks.

There were mixed approaches to the inclusion of CALPs as part of strategy development, relative to other approaches for addressing supply chain risks and impacts. **Certification was a widely adopted** method for addressing supply chain impacts, with all retailers using certification in fruit and vegetable supply chains to some extent. A majority of retailers mentioned using **GlobalG.A.P. standards**, which define farm standards across environmental issues including water, soil and biodiversity, as well as worker safety, animal health and food safety. Retailers identified that they were able to apply these standards across different products and supply chains, and that the broad adoption of GlobalG.A.P. amongst retailers made it a standardised approach. Certification can be a useful tool for influencing practice and impacts at an individual farm level, but compared to CALPs, represents a 'broad and shallow' approach which has limited impact on addressing context specific, landscape-scale issues and risks and therefore creating resilient sourcing landscapes.

11 The EU's Corporate Sustainability Reporting Directive (CSRD) requires companies to report on the impact of corporate activities on the environment and society.

Some retailers such as Lidl had systematically assessed the benefits and trade-offs of using CALPs as a mechanism to address water and biodiversity risk as part of their strategies. Lidl referenced **challenges related to CALP scalability** across landscapes and contexts, and challenges around the amount of resources required to implement CALPs across complex supply chains. Instead of implementing CALPs, Lidl is choosing to focus on certification approaches, and is engaged in developing the GlobalG.A.P. Environmental Sustainability Solution (ESS) to overcome some of the current limitations to certification as a tool for addressing water and biodiversity risk.

On the other hand, EDEKA has made CALPs a more **central component of their strategy** and has developed **specific CALP targets** internally, including targets for implementation and outcomes.

Potential drivers and opportunities for engagement in CALPs

- Requirements under the EU Corporate Sustainable Reporting Directive are a key catalyst for retailers to update water and biodiversity strategies with a greater focus on risk and resilience. This has driven action to identify key risks and impacts in landscapes linked to their supply chains, and consideration of CALPs as a potential approach to address these landscape-scale risks.
- Retailers' process of updating targets is a key opportunity for inclusion of CALPs as part of wider strategies to address water and biodiversity risk.

Key challenges for CALP engagement

- Perceived lack of ability for CALPs to efficiently scale across all supply chains and products, and relatively high cost and resource intensity of implementation.
- Few retailers have set specific internal targets for CALP implementation and outcomes, which would create impetus for CALP engagement while encouraging accountability for successful implementation.

2.3.3 Internal resourcing and senior-level buy-in for CALPs

Criteria	Best Practices
Training and capacity building	▪ Strong commitment to internal training and upskilling for water and biodiversity risk generally, and CALPs specifically ▪ Commitment to ongoing learning and keeping up to date with new developments in managing water and biodiversity risks and specifically CALPs
Internal resourcing for project delivery	▪ Employs individuals with specific responsibilities, time and resources to deliver CALPs ▪ Sustainability (and CALPs) are embedded across the organisation (e.g. procurement)
Senior level oversight and buy-in	▪ Buy-in from senior management at the C-suite level who have oversight and input into the strategic direction of CALPs ▪ Specific KPIs are reported back to senior management regularly, to track progress against CALP targets

Senior level buy-in was a key challenge for sustainability teams' ability to implement CALPs in practice.

Generally, retailers' **sustainability teams were well embedded** within the organisation and wider teams, with good communication between sustainability, procurement and other business functions. Sustainability teams were also **generally in favour of CALPs** as part of a strategy for managing water and biodiversity risk in fruit and vegetable supply chains. However, **senior level buy-in was a key challenge** for sustainability teams' ability to implement CALPs in practice. Several retailers mentioned internal financial pressure to keep prices low for consumers as one reason for lack of senior level buy-in for CALPs. Similarly, retailers mentioned difficulty in scaling current sustainability investments to cover CALPs, with a perception of CALPs as a significant additional cost and resource, and associated lack of buy-in from senior decision makers.

EDEKA was one exception in this regard, with specific internal CALP targets and responsibilities amongst members of their sustainability teams to work towards CALP targets. EDEKA identified that having the **'full support' of the CEO as well as internal KPIs for CALP** implementation were key to EDEKA's engagement in CALPs.

ALDI SÜD and others recognised that the lack of a **CALP-specific target and clear KPIs** for demonstrating market alignment and recognition was a key challenge to ensuring senior level buy-in.

Potential drivers and opportunities for engagement in CALPs

- Including CALPs specifically in retailer strategies and target setting can facilitate greater responsibility for CALP delivery within internal teams.
- Senior level buy-in to CALPs as a central part of the retailers' strategy is a key enabler for greater CALP engagement.

Key challenges for CALP engagement

- Retailers identify a need for clear KPIs to understand and track project outcomes against internal objectives, and communicate these to senior decision makers, creating buy-in for CALPs and incentives to invest. Standardised KPIs for understanding the impact of CALPs, and that allow comparability between retailers, do not currently exist.

2.3.4 Engagement in collaborative forums for addressing water and biodiversity risk in fruit and vegetable supply chains

Criteria	Best Practices
Engagement in collaborative forums	▪ Strongly committed driver and creator of collaborative action through CALP implementation in fruit and vegetable supply chains, with strong remit to influence the agenda and catalyse industry change. ▪ Actively engage in collaborative platforms (e.g. the Alliance for Water Stewardship (AWS), Sustainability Initiative Fruit and Vegetables (SIFAV)) to enhance sectoral transformation, including use of platforms to share learning and knowledge from CALPs with project partners and competitors.

Several retailers recognised the **importance of pre-competitive collaboration** as critical not only for CALP implementation, but also for addressing supply-chain risk more broadly. This was understood as a shift in sentiment from previous competitive approaches, with EDEKA suggesting they were "previously not interested in engaging with competitors, but now see this as critical".

Several retailers recognised the importance of pre-competitive collaboration as critical not only for CALP implementation, but also for addressing supply-chain risk more broadly.

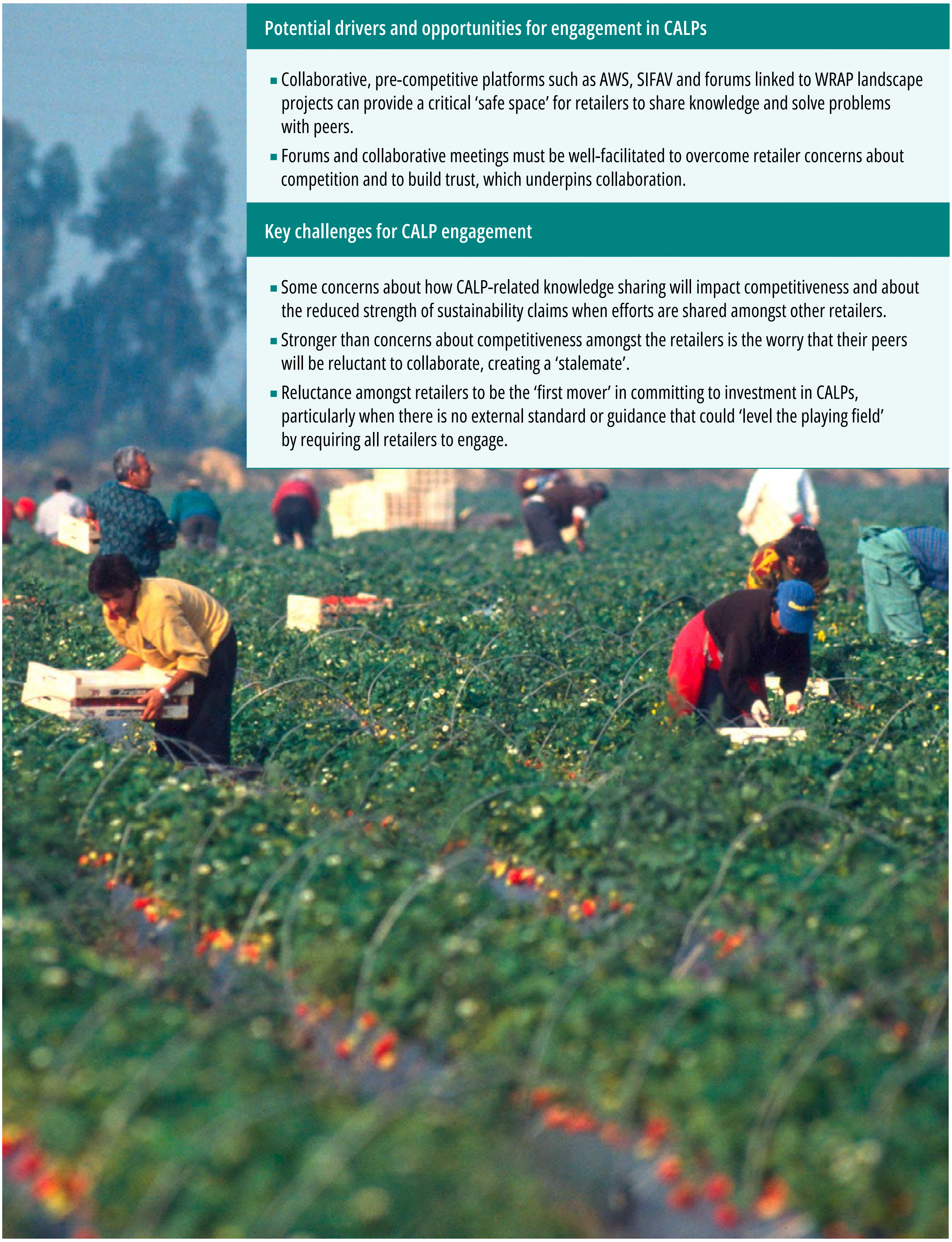
Despite this general sentiment towards collaboration, **retailers' perception of their peers** could hold back action, with a **wariness of other retailers' attitudes towards collaboration.** For example, some retailers perceived that other retailers were resistant to participating in collaborative initiatives due to concerns about losing a competitive edge associated with performing better on sustainability than other retailers. Amongst the retailer cohort, this was not a concern explicitly identified by many retailers, although Spar stated that participating in collaborative efforts could 'dilute' the sustainability claims they could make.

Collaborative forums such as the AWS Global Water Stewardship Forum[12], the Sustainability Initiative for Fruit and Veg (SIFAV[13]), and forums linked to WRAP landscape projects were seen as critical by retailers as a **pre-competitive safe space for knowledge sharing, problem solving and meaningful engagement with peers.** They were also seen as a means to identify potential landscape projects for retailers to engage with and as valuable partners to supplement the internal resources that retailers have available for delivering CALPs. Some retailers, such as Coop and EDEKA, reported playing a more active role in platforms, actively engaging peers and sharing project learnings (including Coop's attending events in-person with WRAP at the Doñana project site, and EDEKA's recent presentation on CALPs at the AWS annual conference).

12 AWS: 10th Global Water Stewardship Forum, https://a4ws.org/global-water-stewardship-forum

13 SIFAV, https://sifav.com

Retailers including ALDI SÜD and EDEKA acknowledged the **crucial role of effective facilitation** in these collaborative forums and meetings for helping retailers to build trust and dialogue, which is essential for ongoing collaboration.



Potential drivers and opportunities for engagement in CALPs

- Collaborative, pre-competitive platforms such as AWS, SIFAV and forums linked to WRAP landscape projects can provide a critical 'safe space' for retailers to share knowledge and solve problems with peers.
- Forums and collaborative meetings must be well-facilitated to overcome retailer concerns about competition and to build trust, which underpins collaboration.

Key challenges for CALP engagement

- Some concerns about how CALP-related knowledge sharing will impact competitiveness and about the reduced strength of sustainability claims when efforts are shared amongst other retailers.
- Stronger than concerns about competitiveness amongst the retailers is the worry that their peers will be reluctant to collaborate, creating a 'stalemate'.
- Reluctance amongst retailers to be the 'first mover' in committing to investment in CALPs, particularly when there is no external standard or guidance that could 'level the playing field' by requiring all retailers to engage.

2.4 NATURE OF RETAILERS' ENGAGEMENT IN CALPS

For retailers currently engaged in CALPs, the nature and extent of their project engagement varied. Aspects such as engagement with local stakeholders, building trust with producers and partners, and appropriately monitoring and reporting outcomes are key elements for CALP success. The degree of retailers' engagement in CALPs was assessed across the following categories:

- 2.4.1 **Engagement with partners and peers,** and the recruitment of new actors in projects
- 2.4.2 **Funding commitments to projects**, including a long-term outlook and sufficient funding for project costs
- 2.4.3 **Engagement with local stakeholders**, the co-development of projects which meet both retailer and local goals, and retailer engagement in project governance
- 2.4.4 **Processes for monitoring, reporting and verification** of project outcomes, both internally and externally

The information in this section includes that provided by retailers currently engaged in CALPs (ALDI Nord, ALDI SÜD, EDEKA, Migros) and for retailers with previous engagement in CALPs (Coop, Kaufland, REWE). Where relevant, we also include information from retailers' projects that do not fit under the definition of CALPs (Lidl). No relevant information on these topics were provided by BILLA and SPAR.

2.4.1. Engagement with partners and peers

Criteria	Best Practices
Knowledge sharing	▪ Transparent and open in sharing information on CALP implementation including feasibility, challenges and progress ▪ Information shared openly and freely, without request
Convening and recruiting stakeholders	▪ Successful in engaging new actors in projects, including doing work to map stakeholders, reaching out to stakeholder groups, and organising and facilitating productive dialogue.

Many retailers emphasise the **importance of open knowledge sharing, and creating a culture of sharing and trust** not only when implementing CALP, but also when addressing water and biodiversity risks more broadly. For retailers engaged in CALPs, collaboration and knowledge sharing **typically takes place through project partners (e.g. WRAP, SIFAV) via websites and reports** which are funded by platform members. These repositories share learnings and guidance on CALP projects, potentially incentivising further engagement. Where retailers had limited knowledge sharing, they referenced barriers such as **difficulties in tracking project impact**, meaning lack of meaningful outcomes or learnings that could be shared.

Many of the retailers who were engaged in projects described their role as a "promoter" of projects (e.g. ALDI Nord) and to "convince other stakeholders to be part of projects" (EDEKA). However, it was not clear that retailers had successfully engaged peers in existing projects. This may suggest there is **more work to be done to build trust between retailers** and to promote genuine collaboration and partnerships in implementing CALPs on the ground.

Potential drivers and opportunities for engagement in CALPs

- Knowledge sharing via project partners and pre-competitive forums can facilitate greater transparency in knowledge sharing and can improve access to knowledge for retailers not engaged in CALPs.

Key challenges for CALP engagement

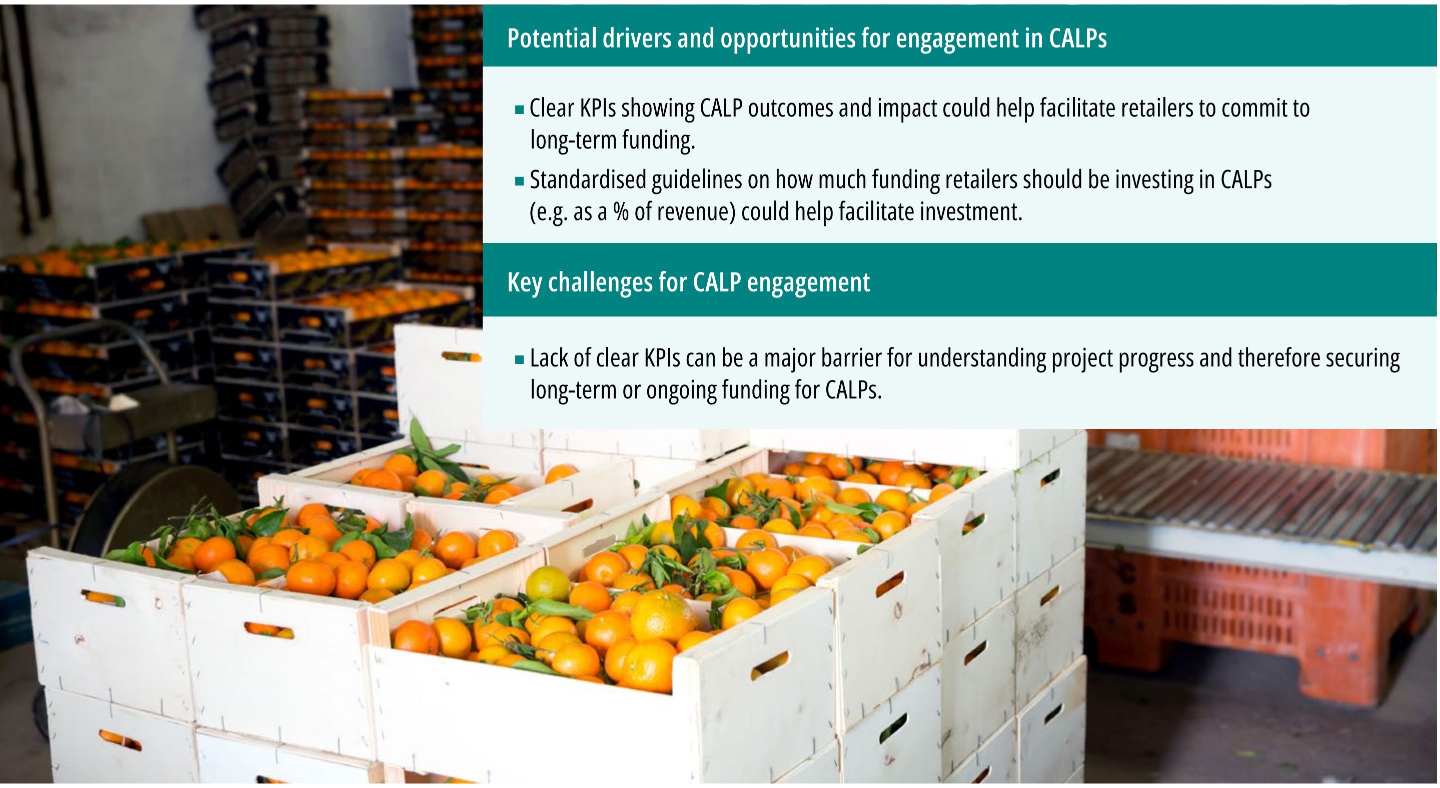
- Some retailers claim to actively promote stakeholders and onboard them into existing projects, albeit with limited success. This may suggest there is work to be done to build trust between retailers and promote genuine collaboration and partnerships when implementing CALPs on the ground.

2.4.2 Funding commitments for CALPs

Criteria	Best Practices
Funding contribution	▪ Commitment to long-term (5+ years) of funding for multiple CALP projects ▪ Funding demonstrably covers project costs beyond only paying for on-farm practices (i.e. includes contribution to governance of project, required internal or external training, MRV etc.)

The retailers currently engaged in CALPs (ALDI Nord, ALDI SÜD, EDEKA, Migros) shared some information on funding commitments and contributions. For all of these retailers, the specific allocation of funding within the CALPs they were engaged with was facilitated through **third-party project partners** such as WRAP and WWF who manage the specific allocation and use of funding. Retailers did not provide detailed information on the specific length of contracts or funding commitments, although most have been supporting projects for several years. For these retailers, continued engagement in projects was not necessarily contingent on demonstrating immediate outcomes, although ALDI SÜD and EDEKA did state that a **lack of clear KPIs can be a barrier** to demonstrating project progress and making the case for further CALPs investment.

One retailer mentioned that standardised guidelines on the amount and length of funding that they should be committing to CALPs would help 'level the playing field' and avoid investing significantly more or less than competitors.



Potential drivers and opportunities for engagement in CALPs

- Clear KPIs showing CALP outcomes and impact could help facilitate retailers to commit to long-term funding.
- Standardised guidelines on how much funding retailers should be investing in CALPs (e.g. as a % of revenue) could help facilitate investment.

Key challenges for CALP engagement

- Lack of clear KPIs can be a major barrier for understanding project progress and therefore securing long-term or ongoing funding for CALPs.

2.4.3 Local stakeholder and producer engagement and project governance

Criteria	Best Practices
Stakeholder collaboration	▪ Proactive and robust approach to engage with multiple stakeholders at project sites including systematic engagement with local producers and communities ▪ Set shared landscape goals and use local input to guide strategic direction of projects ▪ Engagement is aligned with key guidance from SBTN, TNFD, ISEAL (International Social and Environmental Accreditation and Labelling Alliance), and AFi (Accountability Framework initiative)
Project governance	▪ Clear governance structure in place for projects and retailers' role is beyond purely a financial contribution, but instead is fully embedded in developing strategic direction
Benefit and risk sharing mechanisms	▪ Clear benefit sharing mechanisms are in place for all projects, including specific financial benefits received by local stakeholders as a proportion of project revenue ▪ Free Prior and Informed Consent in place for all project activities ▪ Local stakeholders are appropriately remunerated for their time, input, resources, etc.

Retailers who were currently engaged in CALPs (z. B. ALDI Nord, ALDI SÜD, EDEKA, Migros) demonstrated a progressive approach to local stakeholder engagement. For these retailers, local stakeholder engagement is **facilitated by local project partners**, whom retailers perceive to have greater dedicated resources and connectivity with local actors to take on this role.

Retailers' roles in project governance varied, with some playing an active coordination role in projects, while others provided contributions financially or in kind.

Retailers' roles in project governance varied, with some playing an active coordination role in projects, while others provided contributions financially or in kind. Some retailers **perceived a lack of available project opportunities** and expressed a need for a database of projects that were relevant to their sourcing locations, and for an assessment of which were 'good' projects to invest in. Collaborative forums such as AWS and SIFAV (see Section ▸ 2.3.4, above) were seen as one way to know about potential projects, and there was overall a suggestion that third parties would be a good source of this information. Existing platforms including SourceUp[14] (which connects supply-chain actors with existing landscape initiatives) and LandScale[15] (which provides a framework to evaluate landscape initiatives), amongst others, were not mentioned by retailers, but seem to potentially answer the need they expressed.

14 SourceUp is a platform that connects supply chain stakeholders with existing landscape initiatives: https://sourceup.org

15 LandScale is a global framework and digital platform that enables landscape initiatives to assess, validate, and communicate sustainability performance at the landscape level, and to showcase the maturity and impact of landscape partnerships. https://www.landscale.org

Only EDEKA and Migros provided information about risk and benefit sharing mechanisms in place for CALPs. EDEKA engages with project suppliers and producers through long-term partnerships, complemented by targeted, project-specific support. Appropriate incentives and remuneration and rewards for local producers are key to long term project success.

Potential drivers and opportunities for engagement in CALPs

- Retailers need to take a proactive approach to identify CALP opportunities and initiate activities (e.g. identifying locations, coordinating with project partners, engaging stakeholders).
- Third-party partners can facilitate resource-efficient and effective local stakeholder engagement, but retailers should actively and regularly engage with these partners. This could be encouraged by the integration of partner activities and outcomes in retailers' internal KPIs.

Key challenges for CALP engagement

- Retailers' expectations for 'ready-made' projects can mean a lack of new projects.
- There may be a particular need for a focus on measures for risk- and benefit-sharing mechanisms within CALPs.

2.4.4 Monitoring, reporting and verification

Criteria	Best Practices
Monitoring aligned with goals of local stakeholders in the landscape	▪ Clear monitoring plans in place for all projects, for understanding project outcomes, and for enabling learnings from the project process ▪ Data collection is used to improve and adapt the programme over time, and to improve overall delivery and decision making ▪ Data collection is aligned with both retailer's goals and with the objectives of broader stakeholders in the landscape
Processes for reporting impact internally	▪ Retailer has a clear process for monitoring project impact, and is reporting in line with clear internal goals for CALPs
Transparency and public reporting	▪ Outcomes shared transparently with project partners and external stakeholders, including sharing successes and challenges from project development ▪ Retailer takes a proactive approach to communicating project outcomes, while external guidance on biodiversity and water-related claims are under development

Where retailers shared details on monitoring plans for projects, these were most often facilitated through **third-party project partners** who have dedicated resourcing and expertise, better access to stakeholders on the ground, and a greater understanding of local context. There was a recognition amongst retailers of the importance of **communicating project outcomes transparently**, so as to facilitate knowledge sharing and allow projects to scale to other supply chains and sourcing regions. For example, Lidl spoke of the importance of "bring[ing] learnings to the whole value chain" even from projects that are (at least initially) limited in scale and scope.

ALDI SÜD, EDEKA and Lidl cited the importance of developing a common and standardised approach to reporting outcomes from projects in order to enable comparability between retailers and support internal buy-in amongst senior decision-makers.

For most retailers, **monitoring and reporting outcomes from CALPs was a key challenge** and a key barrier to involvement in these projects. ALDI SÜD, EDEKA, and Lidl cited the importance of developing a common and standardised approach to reporting outcomes from projects in order to enable comparability between retailers and support internal buy-in amongst senior decision-makers. These retailers also mentioned the need to balance standardised and comparable metrics used at a company level with context-specific metrics relevant to local stakeholders and landscape goals. For example, ALDI SÜD spoke of the "tension between the need to understand progress for ALDI while providing data relating to context-specific challenges".

EDEKA had a monitoring and reporting approach which included measuring outcomes at the landscape scale as well as against internal KPIs. EDEKA reported that outcomes are communicated with local stakeholders through multistakeholder platforms. They also stated that outcomes are reported publicly, using **narrative or storytelling approaches in the short term** whilst methods of outcome measurement and attribution for collaborative projects continue to be developed.

Potential drivers and opportunities for engagement in CALPs

- Third-party project partners can support robust MRV where retailers lack on-the-ground access and resources.
- Identifying learnings that can be scaled up across more of the retailers' supply base could increase the support for and—the scale of impact of—CALPs.
- Guidance on robust KPIs suitable for monitoring local, context-specific outcomes and aggregated company-scale outcomes would help retailers measure CALP impacts. There is a particular gap in the understanding of robust metrics for biodiversity risks and impacts.

Key challenges for CALP engagement

- Lack of standardised reporting processes for CALPs outcomes that balance understanding of impact for retailers with local understanding and context.

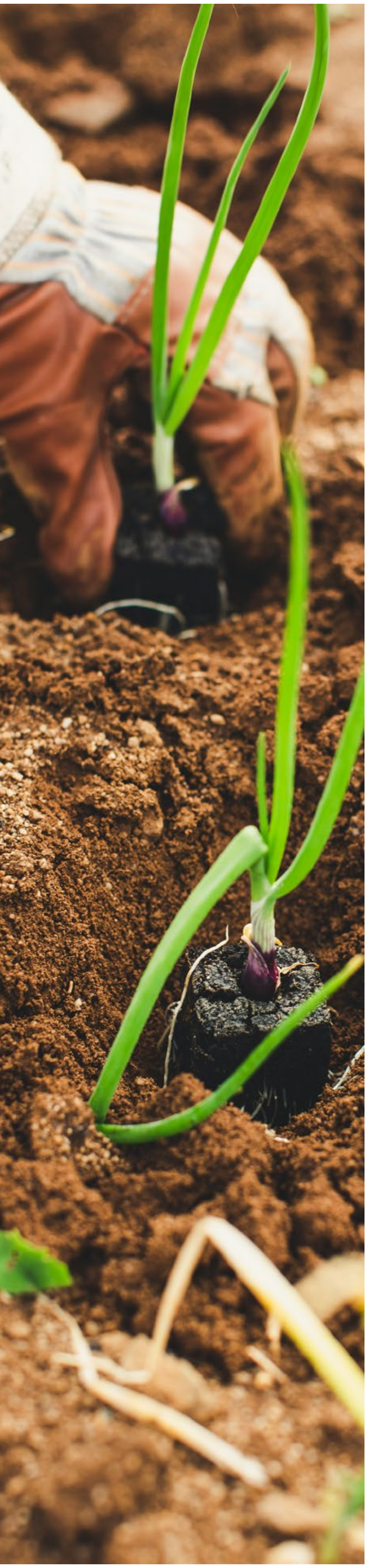
2.5 SUMMARY OF KEY DRIVERS AND BARRIERS FOR CALP ENGAGEMENT

Retailer responses revealed a number of key drivers challenges to CALPs engagement. Those already actively engaged in CALPs often show greater understanding of the need for collaborative solutions to landscape-scale risks and impacts, of the need to address risk 'beyond the farm fence', and of the risks in their supply chains, including those tied to specific landscapes and regions.

Given the landscape-scale nature of these risks, retailers are starting to consider how they can address these impacts at the appropriate scale, beyond the farm level, and CALPs are viewed as a potential effective mechanism.

Key drivers and opportunities for engagement in CALPs

- The EU Corporate Sustainable Reporting Directive (CSRD) is putting **regulatory pressure** on retailers to shift towards a risk and resilience perspective when evaluating supply chains and water and biodiversity impacts and dependencies, while the EU Corporate Sustainability Due Diligence Directive (CSDDD) is putting pressure on retailers to respond to identified risks. Given the landscape-scale nature of these risks, retailers are starting to consider how they can address these impacts at the appropriate scale, beyond the farm level, and CALPs are viewed as a potential effective mechanism.
- Retailers are experiencing increased **sourcing risk and disrupted supply** of key commodities, and are exploring mechanisms to mitigate risk. Growing recognition of the need for resilience activities **'beyond the farm fence'** is leading some retailers to consider landscape approaches to address systematic risks in key sourcing regions.
- **Consumers and buyers** are increasingly demanding sustainably-produced products and there is considerable **reputational risk** for retailers to be tied to production regions where negative environmental and social impacts are occurring. For example, one retailer identified that engagement in a CALP with WRAP in Doñana, Southern Spain, was driven by customer concerns around water use practices in the region's strawberry production.



There are areas of positive momentum and progress in retailers' readiness to engage in CALPs. The CSRD has drivenr retailers to focus more on understanding risk and resilience within supply chains, and all retailers have carried out some degree of supply chain risk mapping. Understanding where there is risk is a critical first step in understanding key locations for CALP development for addressing risk. There is also a positive shift in sentiment amongst some retailers away from sustainability as competitive advantage and towards **collaboration between peers.**

Challenges and barriers to engagement in CALPs

Retailers communicated a number of elements that continue to present challenges or barriers to engagement in CALPs. This includes concerns around the scalability of CALPs across multiple supply chains and products, lack of buy-in amongst senior staff for CALPs as a solution, and challenges around standardisation of reporting outcomes. In addition, there are a number of higher-level challenges today that may limit retailer engagement with CALPs:

- **Regulatory complexity and uncertainty:**
  While regulation is a key driver pushing retailers to understand water and biodiversity risks in their fruit and vegetable supply chains, they face new uncertainty from the EU omnibus and ongoing changes to CSRD requirements. Equally, the requirements of CSDDD—which encourages retailers to take action within high-risk supply chains—also remain unclear, creating ongoing uncertainty for retailers about what action is required.
- **Consumer demand for low prices:**
  While retailers are seeing increased consumer pressure for sustainable products and evidence of sustainability credentials, this is often in tension with consumer demand for affordable food. Retailers (particularly discounters) are under pressure to keep prices low, which is in tension with the perceived cost of sustainability efforts.
- **Collaboration and competition:**
  Retailers are increasingly aware of the need for pre-competitive collaboration to address supply chain risk and support producers across landscapes. However, many are waiting for evidence of success from peer engagement in CALPs before committing to implementing projects themselves. This can create a stalemate, with few retailers taking initiative. This is reflected in retailers widely citing a perceived lack of available CALPs to engage in, where in reality it takes work for retailers to identify or initiate projects themselves. While knowledge-sharing and learning between retailers is an important first step, there is a risk that communication will de-emphasise action in CALP implementation.

Retailers are widely citing a perceived lack of available CALPs to engage in, where in reality it takes work for retailers to identify or initiate projects themselves.

- **Scalability in solutions:**
  Two retailers stated that a challenge to CALPs engagement was the perceived difficulty in scaling the outcomes or learnings from CALPs across other supply chains and locations. CALPs are, by design, context-specific and tailored to address critical landscape-scale risks impacting farmers in 'hotspot' locations and that individual farm-level actions—such as those introduced via certification—cannot mitigate. CALPs can play a critical role in ensuring the resilience of suppliers in these hotspot landscapes, and retailers could focus their use of CALPs in these priority areas. Although a specific CALP cannot be repeated identically across all supply chains and sourcing locations, there is good potential to improve the scalability and replicability of CALP implementation so as to increase the efficiency and likelihood of success of projects in new sourcing regions. Retailers said that common guidelines on CALPs, or even potentially integrating CALPs within widely-used standards such as GlobalG.A.P., could help drive greater engagement and uptake.
- **Data standardisation:**
  There were challenges in the ability to scale data and outcomes from projects. Retailers were concerned about the tension between the need for local context-specific data to understand in-situ project impacts and the need for standardised metrics and reporting for tracking against internal KPIs (for comparability between projects) and external frameworks (for comparability between retailers).

3 CONCLUSIONS

3 CONCLUSIONS

Engagement with retailers has revealed key learnings around the successes and challenges retailers face in implementing CALPs.

01/

Retailers recognise the importance of collective action and the need to collaborate around shared water and biodiversity risk in theory, but engagement in CALPs remains limited in practice. Retailer action is 'stalling' at the stage of identifying risks and participating in collaborative platforms and collective action pilot projects. As a result, retailers are not reaching the stage of meaningful investment in CALPs at the scale required for outcomes across high-risk sourcing landscapes.

02/

With the exception of those already engaged in CALPs, **most retailer action remains largely individual, and landscape scale action is fragmented.** Several retailers are prioritising activities with farmers within their own supply chains rather than working together with other retailers and a broader network of stakeholders at the landscape scale. This is partly due to perceived lack of evidence for CALP success, and the relative ease of engaging directly with a known supply chain rather than with a broader network of stakeholders. In reality, CALPs require taking a broader view of risk that does not only consider on-farm risk drivers, but a range of other drivers across whole landscapes and regions.

03/

Where retailers are engaged in CALPs, it is often through a **bilateral relationship between one retailer and one NGO or collaborative platform** (e.g. WRAP, SIFAV or WWF) who manage multiple relationships and stakeholders. This places a high burden on the NGO/platform managing the relationship. While NGOs are able and willing to support retailers in scaling and catalysing CALP investment, retailers should take greater ownership in collaboratively initiating CALPs in shared high-risk sourcing regions.

04/

Retailers are paying greater attention to **'risk and resilience'** within fruit and vegetable supply chains and have a better understanding of where water and biodiversity risks are concentrated. Recognising where retailers experience risk in shared sourcing regions can catalyse collaboration, deliver landscape-scale outcomes, and build greater supply-chain resilience. **However, current collaboration between retailers in shared sourcing regions remains relatively limited in practice.**

05/

Outside of sustainability teams, **a short-term perspective on 'risk management'** means that pressures to keep consumer prices low in the near term will prevent investment in CALPs as a longer term risk management strategy. Sustainability teams need support to gain 'buy-in' from senior management for strategic CALP investments.

06/

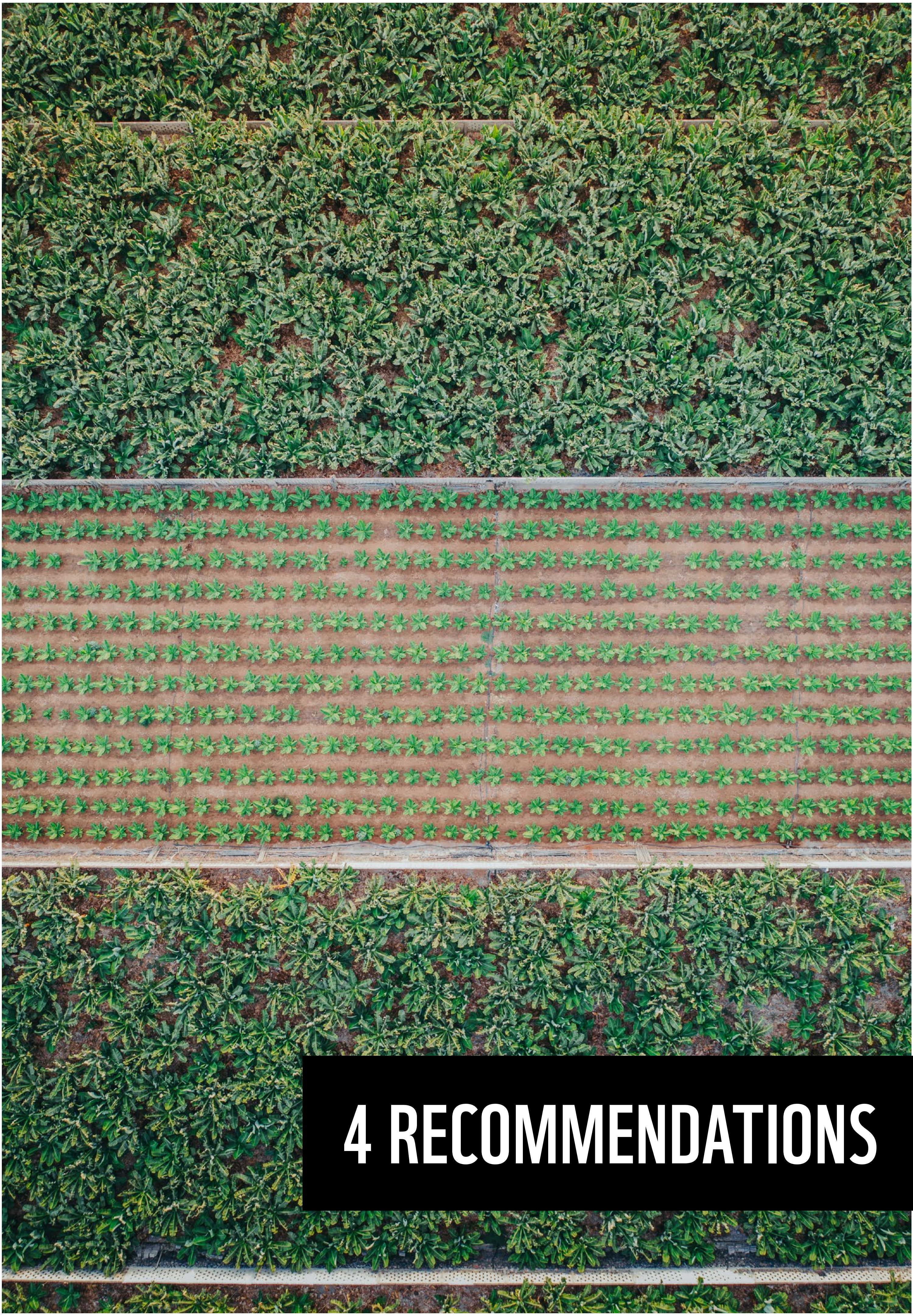
Project engagement is limited by **lack of standardised metrics** for understanding project outcomes. Common impact metrics, with open and accessible data, are helpful for communicating project progress and gathering internal buy-in but need to be balanced with context-appropriate data for individual projects.

07/

Most retailers **currently use certifications as part of their strategies to manage supply chain risk,** sometimes instead of CALPs. While certifications can be a useful 'broad and shallow' measure for improving supply-chain sustainability, they are **not a sufficient alternative to CALPs**. Certifications are limited to influencing on-farm actions, and have limited scope on specific issues (e.g. water quality). In comparison, CALPs address multiple material risks beyond farm boundaries and across whole landscapes. Investing in CALPs at scale also reduces the risk of wasted investment if one producer disappears from the supply portfolio.

08/

A small number of retailers communicated a desire for **solutions to supply-chain risk that could readily be 'scaled'** across multiple products and supply chains. These retailers said that one of the major difficulties in the use of CALPs as part of a strategy to reduce supply-chain risk was the perception that they cannot easily be scaled across multiple products and regions. However, by **targeting CALPs in regions where landscape risks are most acute** and where retailers have high sourcing dependency, landscape collaborations can increase the scale and scope of impact in a region whilst sharing costs with other stakeholders with common landscape risks.



4 RECOMMENDATIONS

4 RECOMMENDATIONS

Based on the conclusions and key findings in this report, we have provided recommendations for retailers and 'enabling environment' stakeholders to catalyse action for CALP implementation. 'Enabling environment' stakeholders are those responsible for creating conditions for retailers to initiate action, de-risk investment in CALPs, and demonstrate the value of CALPs as part of a long-term resilience strategy. These recommendations are structured around three themes:

Prioritise action in areas of highest risk to maximise efficiency per investment (▸ Table 2)

Increase collaboration between all relevant stakeholders including between retailers across the supply chain and with NGOs, collaborative platforms, standard developers and policy-makers (▸ Table 3)

Create standardisation in approaches for CALP implementation, management, monitoring and reporting (▸ Table 4)

Table 2:
Recommendations to prioritise action in areas of highest risk and to maximise efficiency per investment

Recommendations: Prioritise action in areas of highest risk to maximise efficiency per investment

Retailers identified high resource requirements and costs associated with CALP implementation as a barrier to action. Retailers can maximise the relative impact from CALP investment by prioritising CALPs in regions where landscape biodiversity and water risks are most acute, and where retailers have high sourcing dependency. Maximising impact from investments could help promote buy-in to CALPs from senior management.

STAKEHOLDER	ACTION
Retailers	**Use risk mapping tools and sourcing data to identify highest risk fruit and vegetable commodities and linked sourcing regions.** ▪ Prioritise implementation of CALPs in these high-risk 'hotspots', ideally with other retailers who share known high-risk sourcing regions, to maximise impact in highest priority locations and improve the resilience of key sourcing landscapes.
	Invest in identifying existing and potential CALPs in 'hotspot' sourcing locations. Consider investing in existing tools such as SourceUp[16] and LandScale[17], amongst others. ▪ Where CALPs do not yet exist in key sourcing locations, retailers should identify relevant opportunities to implement new CALPs with other retailers and project partners.
	Develop the language to communicate the importance of investing in CALPs with senior management. ▪ Retailer sustainability teams can use knowledge of exposure to risk in fruit and vegetable supply chains to gain buy-in from senior management for investment in CALPs. ▪ This should be centred around taking a long-term perspective to building resilience and reducing risk.
Other supply-chain actors (suppliers, distributors, producers)	**Work with retailers to communicate the experience of water and biodiversity risks in the upstream supply-chain.** ▪ Upstream supply-chain actors (suppliers, distributors, producers) can communicate their experience of water and biodiversity risks, helping retailers to prioritise action and deepening relationships between upstream supply-chain actors and retailers. ▪ Collaboration can also help to pool resources, increase funding and maximise the cost-efficiency of CALPs.
NGOs and collaborative platforms	**Continue to map collective action efforts using existing platforms (e.g. SourceUp, LandScale and the Water Action Hub[18]) and regularly update information on current and ongoing projects to provide resources for retailers and others in identifying CALPs for investment.** ▪ Mapping should communicate ongoing existing projects as well as potential new projects. ▪ Clear and updated databases of project opportunities can support retailers to engage in projects in their 'hotspot' sourcing locations.

16 See footnote 14.

17 See footnote 15.

18 UN Global Compact Water Action Hub, https://wateractionhub.org

STAKEHOLDER	ACTION
NGOs and collaborative platforms	**Support retailer sustainability teams in demonstrating the 'business case' for investing in CALPs and in developing different sustainable funding models for CALPs so that they can gain internal buy-in from senior strategic decision-makers.** ▪ NGOs should support retailers in gathering evidence and making a clear case for investing in CALPs, with appropriate language for gaining internal buy-in from senior decision-makers for CALPs. ▪ This should include a clear demonstration of the benefits of CALPs for increasing long-term supply region resilience and reducing supply risk. This could take the form of reports and other publications, and of direct collaboration with retailer sustainability teams.
	Bring attention to high-risk regions where retailers are actively sourcing, putting pressure on retailers to address landscape-scale issues in these areas. ▪ Pressure from consumers, and risk to brand reputation, can be a strong driver for engagement in CALPs in regions and for commodities linked with negative environmental and social impacts. Making risks in key sourcing regions known could encourage retailers to prioritise action.
Policymakers and government	**Provide greater clarity on requirements so that retailers can understand and address environmental risks across their value chains, including through the implementation of CSRD and CSDDD and, where relevant, complementary frameworks.** ▪ The CSRD has helped retailers to put a greater focus on risk and resilience within their supply-chains, demonstrating that it is a key driver of retailer action. ▪ Further clarity is needed on requirements so that retailers can mitigate risk in regions identified as highest risk, including the need for collective, landscape-scale action. ▪ Policymakers should help provide clarity to retailers on the requirements of CSRD and CSDDD, and should consider developing complementary guidelines to strengthen this regulatory driver of landscape-scale risk mapping and action.

Table 3:
Recommendations to increase collaboration between all relevant stakeholders including retailers and a wide range of broader stakeholders

Recommendations:
Increase collaboration between all relevant stakeholders including retailers and a wide range of broader stakeholders

Retailers understand the importance of collaboration in addressing shared supply-chain risks in theory, but collaboration in practice is more limited. Increased collaboration can improve the cost efficiency of project implementation, promote shared learning, improve governance structures for projects, and foster deeper relationships with upstream supply-chain actors responsible for on-the-ground action, including producers.

STAKEHOLDER	ACTION
Retailers	**Actively participate in and provide commensurate funding to collaborative networks such as AWS and SIFAV.** ▪ Collaborative networks provide valuable pre-competitive forums for collaboration and knowledge exchange with other retailers, including opportunities to learn from the experiences of existing collective landscape projects. Retailers should be open to sharing experiences (both positive and negative) across these platforms to foster a culture of openness and shared learning. ▪ Retailers should participate actively in these networks (attending meetings, participating in discussions, actively proposing and pursuing initiatives) and should contribute necessary funding to support the network objectives. ▪ These platforms can provide an opportunity to pool resources amongst retailers, share the resource burden of CALP implementation, and combine learnings around shared challenges in existing projects.
	Actively engage with upstream supply-chain actors (producers, distributors, suppliers, etc.) to co-develop CALPs. ▪ Onboard suppliers, distributors and producers to understand the importance of CALPs in developing supply-chain resilience and contribute to CALP implementation. ▪ Engagement of upstream actors should be proportional to their risk exposure and capacity to invest. For instance, producers should be supported with appropriate incentives and resources to transition to sustainable agricultural practices, while suppliers and distributors may contribute financially to CALP development.
	Use internal and external training as a mechanism to build a strong understanding of CALP issues and potential solutions. ▪ Work with NGOs and collaborative platforms to identify training opportunities specifically relating to CALPs. ▪ This should include engagement with wider teams (beyond sustainability teams) and senior management to build awareness of collective, landscape-scale action and incentivise wider buy-in.
Other supply-chain actors (suppliers, distributors, producers)	**Upstream supply-chain actors including distributors, suppliers, and producers should actively engage in CALP implementation and development.** ▪ This includes financial contributions where appropriate (e.g. from suppliers and distributors) and/or active engagement in CALP development, along with developing project aims and objectives to address risk for themselves and for wider supply-chain actors. ▪ Upstream engagement in CALPs can reduce risk for upstream actors who are highly dependent on landscapes, and can increase available pooled funding.

STAKEHOLDER	ACTION
NGOs and collaborative platforms	**Act as conveners, hosting forums and facilitating conversations between retailers and upstream actors in their supply chains (producers, aggregators, manufacturers) and between other relevant stakeholder groups (NGOs, national and local government, etc.) to enable collaboration on landscape initiatives.** ▪ Upstream producers and suppliers are more directly linked to landscape risks and impacts than retailers and therefore need to be actively involved in collaborative landscape initiatives. Retailers are responsible for mapping their supplier base, but NGOs and collaborative forums have a role to play in hosting/facilitating spaces for these actors to meet and work together on implementing collaborative landscape initiatives. ▪ NGOs can also lobby/advocate for retailers to take this collaborative approach.
	Develop tools to integrate 'programme learning' KPIs into all collective action landscape reporting and support retailers on the allocation of claims that can be made from CALPs. ▪ KPIs should capture the elements of success of collaborative landscape initiatives, and the pitfalls to avoid, and encourage transparency between retailers. Capturing and applying these learnings could reduce the investment and resource requirement involved in establishing a new CALP. ▪ Useful learnings could include: What stakeholders should be involved from the start of the development process? What forms of communication are best for building trust with producers? What are the elements that make programme governance work well? ▪ NGOs and CALPs forums can play a role in developing guidance to retailers on how CALPs can be used to demonstrate progress towards their water and biodiversity targets, and create clarity on the types of claims they can make.
Policymakers and government	**Coordinate with stakeholders involved in CALPs to ensure key challenges in sourcing landscapes are addressed at the policy level, and also leverage public funding towards landscape scale projects.** ▪ Policymakers have a role to play in developing policy to address key risks (e.g. poor water use practices) in key sourcing regions. ▪ At the same time, government and policymakers can leverage public funding towards landscapescale projects, supporting them to grow and maximise impact.

Table 4:
Recommendations to create standardisation in approaches for CALP implementation, management, and monitoring

Recommendations:
Create standardisation in approaches for CALP implementation, management and monitoring

Retailers identified the lack of standardisation in implementing and reporting CALPs as a barrier. This includes a lack of standardisation in reporting project outcomes, which currently limits market alignment and the recognition of efforts, as well as a lack of clear guidance for what 'best practice' looks like in CALP projects and engagement. Clearer guidance, roadmaps and expectations for retailer engagement in CALPs can create alignment between retailers, raise the bar for action, and address concerns that sustainability claims are being 'diluted'.

STAKEHOLDER	ACTION
Retailers	**Work through collaborative platforms and standards (e.g. SIFAV, AWS, SBTN) to develop common impact metrics for CALPs.** ▪ Retailers can engage in collaborative platforms and participate in technical coalitions focused on standard-setting to co-develop shared metrics for assessing the impacts of CALPs. AWS[19] recently developed the AWS Standard, designed to be integrated with corporate reporting, to measure the impact of stakeholder-inclusive, catchment-based water stewardship actions. AWS and similar platforms could usefully be involved in developing CALP-specific impact metrics. ▪ Impact metrics should then be adopted by retailers and used in combination with open data sharing to enable comparability between CALPs, share learnings and best practice, and improve market alignment.
	Set targets for landscape engagement and centralise CALPs in the strategy for fruit and vegetable supply chains. ▪ Alignment with the SBTN Landscape Engagement target will ensure standardisation between retailers and readiness for the corporate reporting requirements of CSRD and CSDDD. ▪ Retailers should collaborate with other retailers to share learnings around setting SBTN Landscape Engagement targets and align on interim targets if appropriate.
	Invest in initiatives that promote CALP standardisation (e.g. WWF, SIFAV, AWS), but continue to implement CALPs whilst standardisation is being developed. ▪ NGOs and collaborative platforms can play a role in creating guidance and standards around 'best practice' for designing and implementing CALPs, but will require investment and collaboration from retailers to do so. ▪ Due to the urgency of action in high-risk landscapes, retailers should continue to implement CALPs whilst standardisation is in development.

19 Alliance for Water Stewardship, https://a4ws.org/aws-standard

STAKEHOLDER	ACTION
NGOs and collaborative platforms	**Develop guidance around the process of designing, implementing and managing CALPs, allowing easier uptake in new regions and supply chains.** ▪ While CALPs cannot be repeated identically across all supply chains and sourcing locations, NGOs can support retailers in designing clear, replicable processes for CALP design, implementation, and maintenance. ▪ This could include guidance around targets for CALP implementation (e.g. target coverage of supply chain, percentage revenue, etc.), to create alignment between retailers.
	Develop a roadmap for addressing water and biodiversity risk in retailers' supply chains. ▪ Similar to the WRAP Water Roadmap in the UK, a European roadmap on addressing water and biodiversity risk amongst food sector actors could help facilitate collaborative efforts and help to 'level the playing field' for food retailers by standardising requirements for retail engagement in CALPs.
Policymakers and government	**Develop clarity in regulatory requirements for addressing supply-chain risk, particularly through the Corporate Sustainability Due Diligence Directive (CSDDD).** ▪ The CSDDD has high potential to create greater alignment around retailer requirements for collective, landscape-scale actions by requiring companies to address environmental impacts in their global supply chains. ▪ Further clarity is required to support retailers in mitigating risk in highest-risk regions including through taking collective, landscape-scale action. Policymakers at the EU and national levels should help provide clarity to retailers about the requirements, and should consider developing complementary guidelines to strengthen the regulatory drivers for landscape action.

APPENDICES

Appendix A: Retailers included in project and level of engagement

Retailers	Level of engagement in project	Country/countries of retailer operation in scope for this project
ALDI Nord	Survey (July 2025)	Germany
ALDI SÜD	Survey (July 2025) and interview (September 2025)	Austria, Germany, Switzerland
BILLA	Did not respond to request to participate	Austria, Germany
Coop	Survey (July 2025) and interview (July 2025)	Switzerland
EDEKA	Survey (July 2025) and interview (July 2025)	Germany
Kaufland	Survey (July 2025) and interview (July 2025)	Germany
Lidl	Interview (September 2025)	Austria, Germany, Switzerland
Migros	Survey (July 2025) and interview (August 2025)	Switzerland
REWE	Declined to participate	Germany
SPAR	Survey (July 2025) and interview (July 2025)	Austria, Switzerland

Appendix B: Retailer evaluation criteria, and summary of best practice

Category	Best practice summary
1. Current engagement with Collective Action Landscape Projects (CALPs) on water and/or biodiversity risk in fruit and vegetable (f&v) supply chains	Active engagement
2. Evaluation of water and biodiversity risks in fruit and vegetable supply chains, along with strategies and targets to address them	Detailed evaluation and strategy for high-risk f&v and hotspot sourcing regions.
3. Internal strategy and targets on CALPs and CALP opportunity mapping	Specific strategy and targets on CALPs and evidence of active CALP opportunity mapping.
4. Funding and internal resourcing for addressing water and biodiversity risk in fruit and vegetable supply chains, and for CALPs specifically where relevant	Dedicated internal team, senior management engagement, adequate funding/resources.
5. Engagement in collaborative forums, and role in, responsibility for, and collaboration on projects, including in CALPs where relevant	Active in collaborative forums, driving initiatives and recruiting partners
6. Local stakeholder engagement and collaboration, in CALPs specifically where relevant	Engages local stakeholders in project design, objectives, risk- and benefit-sharing etc.
7. Monitoring, verification and reporting (MRV), in CALPs specifically where relevant	Comprehensive MRV aligned with broader goals in the target region, transparent public reporting

Appendix C: List of Collective Action Landscape Projects and initiatives that participating retailers are engaged in

Retailer(s) engaged	Convening organisation	Country	Fruit and veg covered
ALDI Nord, ALDI SÜD, EDEKA	WRAP + SIFAV	Southern Spain (Doñana)	Berries
ALDI Nord, ALDI SÜD, EDEKA	WRAP + SIFAV	Southern Spain (Mar Menor)	Fruits and vegetables (multiple, not specified)
ALDI SÜD, EDEKA	WRAP + SIFAV	Peru	Avocado, asparagus, grapes, blueberries (etc.)
ALDI SÜD, EDEKA	WRAP + SIFAV	South Africa	Citrus fruits, apples, pears, stone fruit
ALDI SÜD	WRAP	Kenya	Fruits and vegetables (multiple, not specified)
EDEKA, Migros	WWF	Colombia	Bananas
EDEKA, Migros	WWF	Ecuador	Bananas

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Why we are here
To stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature.

WWF Germany
Reinhardtstr. 18 | 10117 Berlin | Germany
Tel.: +49 30 311 777-700
info@wwf.de | wwf.de