

# THE ATLAS CHALLENGE



**A Ranking of Food Delivery Services towards progressive and sustainable food strategies pushing for an overall meat reduction impact.**





# 1. INTRODUCTION

Over 74 billion farm animals are farmed for food each year, and some 50 billion animals are reared for food in intensive farms each year.<sup>1</sup> The Food and Agriculture Organization of the United Nations (FAO) estimates that the demand for meat is going to increase by 70 % by 2050<sup>2</sup> with rising world population which will put more pressure on crop-for-feed growth as well as breeding and raising livestock. The intensification of animal farming, as well as the excessive consumption of meat and animal-based products, have grave impacts on our environment, climate, our health, and animals farmed in factories. It takes 2,500 gallons of water, 12 pounds of grain, 35 pounds of topsoil and the energy equivalent of one gallon of gasoline to produce one pound of feedlot beef.<sup>3</sup> Industrial livestock production contributes heavily on both water and air pollution, especially by ammonia emissions and other greenhouse gases which are the drivers for global

warming. Many recent studies underly the exploitation of natural resources by intensive agriculture and express the necessity for a more sustainable food system. The Lancet report (2019), one of the latest scientific reports created by some of the world's leading scientists and health experts, estimates that the necessary dietary shift "requires a dramatic reduction of consumption of unhealthy food, such as red meat, by at least 50 %" and "an overall increase in consumption of more than 100 % is needed for legumes, nuts, fruit and vegetables."<sup>4</sup>

With the current global natural disasters in mind (Amazon fires, floods, heat waves, droughts, biodiversity loss, decline in insects) and the mistreatment of billions of farm animals, it is imperative for key players in the food industry to take action and step-up for our planet now!



- 1 [Compassion in World Farming assets.ciwf.org/media/7432824/ciwf\\_strategic-plan-revise18-lr2.pdf](https://assets.ciwf.org/media/7432824/ciwf_strategic-plan-revise18-lr2.pdf)
- 2 Food and Agriculture Organization of the United Nations (FAO) 2017. The future of food and agriculture: Trends and Challenges. Rome.
- 3 EarthSave Healthy People Healthy Planet. [www.earthsave.org/environment.htm](http://www.earthsave.org/environment.htm)
- 4 Willet et al. 2019. Food in the Anthropocene: the EAT-Lancet Commission on healthy diets from sustainable food systems. The Lancet Commissions, 393(10170):447-492.

## 2. THE ATLAS CHALLENGE

The Atlas Challenge, by FOUR PAWS, is a business benchmark, ranking the main global players within the food industry sector (with a primary focus of those operating within Germany, Switzerland, Austria and the United Kingdom) on their innovative and sustainable business strategies which pushes for meat reduction and an increase of plant-based and innovative food.\* The name 'Atlas' was inspired by the Atlas Titan in Greek mythology who was responsible for bearing the weight of the world on his shoulders, and who personified endurance. As such, the Atlas Challenge ranking is one which ranks the companies in the various food industry sector, on their current and future plans of being able to carry the responsibility towards a sustainable world. What this entailed is assessing the company's product range, their marketing tactics, their Corporate Social Responsibility (CSR) report (and / or policies) and their commitment and progress towards making positive changes.

This includes the following:

- How animal-friendly is their portfolio regarding the availability of products (or dishes) including vegan and vegetarian meals, meat substitutes as well as innovative food products?
- What marketing tactics do they carry out to promote and highlight vegan / vegetarian / meat substitutes options?
- How is meat reduction involved in their CSR report or part of their corporate identity and strategy?
- Are they willing to proactively push for / and be the driver of a meat reduction movement in the future?

*(Please refer to the indicators overview on page 6 / 7 for detailed information)*

Online food delivery services, which were the first targeted stakeholders of the food industry in this challenge, have a big impact on consumer choices as they are one of the rapidly rising sectors in the food market, as more and more people are ordering meals online. Since a meat reduced diet is synonymous with an animal and climate-friendly diet\*\*, food delivery services have a responsibility to encourage participating restaurants to take clear measures in reducing the amount of meat offered in their menus. The ranking results have indicated that initial positive initiatives for the environment are implemented by some of the world-leading companies, urging partnering restaurants to become more environmentally friendly through the use of recyclable packaging, cardboard cutlery and / or paper bags as well as by offering sustainable business practices to their partnering restaurants. However, much more can be done in order to drive for a better tomorrow, which will at the same time benefit farm animals suffering in factories.

### FACTS



Food systems contribute 21–37 % of global greenhouse gases (GHG), and are significant contributors to deforestation, biodiversity loss and declining water tables<sup>5</sup>



14.5 % of global GHG emissions are caused by livestock farming<sup>6</sup>



Meat products have larger carbon footprints per calorie than grain or vegetable products<sup>7</sup>



Animal agriculture is a leading source of carbon-dioxide, nitrous oxide and methane emissions; the top three greenhouse gases<sup>8</sup>



77 % of agricultural land is used for livestock, and 23 % for crops<sup>9</sup>



Land-use-changes to gain cropland for feed production and grazing land are major reasons for deforestation<sup>10</sup>



Every 4 lbs of beef you eat contributes to as much global warming as flying from New York to London<sup>11</sup>

\* Innovative food such as the Beyond Meat, Just Egg or cultured meat products once it hits the market.

\*\* A diet consisting of mainly plant-based food, and where with meat, dairy and eggs are sourced from high animal welfare production systems.

5 What we eat matters: To change climate crisis we need to reshape the food system [www.theguardian.com/commentisfree/2019/oct/08/climate-change-food-global-heating-livestock](http://www.theguardian.com/commentisfree/2019/oct/08/climate-change-food-global-heating-livestock)

6 [www.fao.org/news/story/en/item/197623/icode/](http://www.fao.org/news/story/en/item/197623/icode/)

7 Center for Sustainable Systems-University of Michigan <http://css.umich.edu/factsheets/carbon-footprint-factsheet>

8 [www.fao.org/3/a0701e/a0701e00.htm](http://www.fao.org/3/a0701e/a0701e00.htm)

9 [www.ourworldindata.org](http://www.ourworldindata.org)

10 [www.fao.org/fileadmin/user\\_upload/fsn/docs/Wirsenijs\\_et\\_al\\_Agric\\_Syst\\_Land\\_use\\_in\\_2030.pdf](http://www.fao.org/fileadmin/user_upload/fsn/docs/Wirsenijs_et_al_Agric_Syst_Land_use_in_2030.pdf)

11 The New Yorker [www.newyorker.com/magazine/2019/09/30/can-a-burger-help-solve-climate-change](http://www.newyorker.com/magazine/2019/09/30/can-a-burger-help-solve-climate-change)





### 3. POWER OF THE FOOD DELIVERY SECTOR

The production of meat and other animal products places a heavy burden on the environment – from crops and water required to feed farmed animals, to the transport and other processes involved from factory farms to our plates.

The food delivery service sector plays a major role in society by providing a platform to order meals with a click of a button and is challenged to meet their customers demand for more sustainable food choices. With consumers becoming more health and environmentally conscious, competition amongst food delivery services is evident by comparing the forward-thinking companies to the ones falling behind, in relation to a sustainable economy. As the world's leading food service providers of online food ordering and delivery, companies are bearing responsibility for the environment and climate protection through some initiatives like implementing targets and policies for packaging, recycling, food waste, and energy efficiency. Sustainable food strategies however, (which also include more plant-based options and meat alternatives as well as an overall meat reduction approach) are mostly lacking amongst the food delivery sector.

#### BEST PRACTICE

There are some positive initiatives taken by international food delivery services, and one worth mentioning for its bold efforts is Singapore's leading food delivery service *foodpanda*. Not only did they launch their 'Better than Plastic' campaign, but they promote conscious food choices through various initiatives.



While they understand that everyone is free to make their own food choices, they take steps to help educate both their customers and their partnering restaurants on options they can take to support sustainable food choices through their platform. They are the first delivery platform to completely ban shark fin in February 2018, in partnership with WWF. They have implemented Happy Hour with an Impact: making all orders during the campaign period each month climate positive in partnership with CHOOOSE and launched Meat Free Mondays in January 2019, where they are committed to offering free delivery on vegan and vegetarian restaurants.<sup>12</sup>

The market for food delivery services is constantly increasing and will rapidly change the global food industry. With these factors in mind, delivery services should use their power to steer the direction for more sustainable food choices and become progressive planet-savvy pioneers which will benefit consumer's health, decrease the number of farmed animals in factories and contribute positively towards the planet as a whole.

<sup>12</sup> [www.foodpanda.sg/contents/foodpandacares](http://www.foodpanda.sg/contents/foodpandacares)

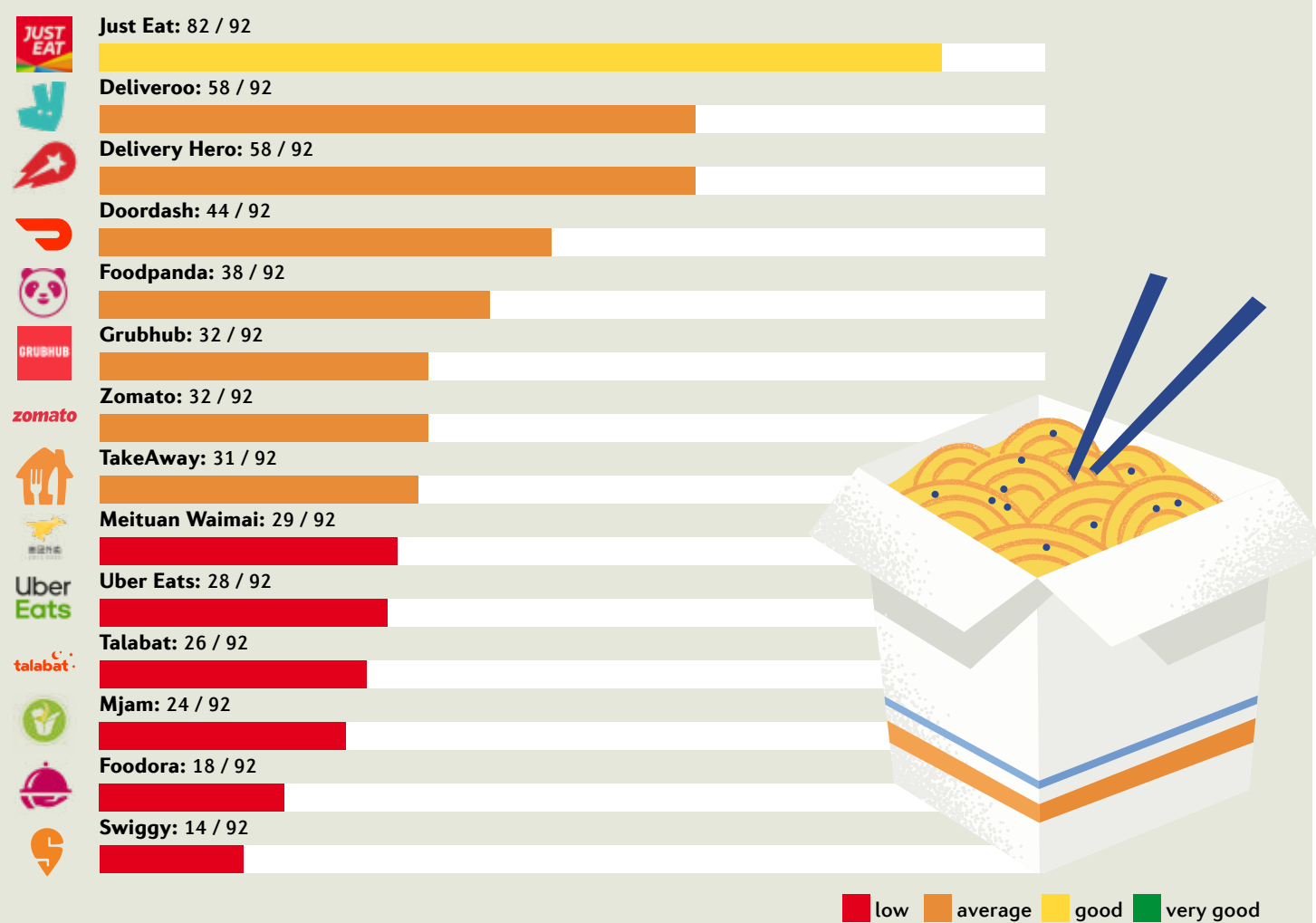
## 4. FOOD DELIVERY SERVICES RANKING

In 2019, FOUR PAWS asked 14 worldwide leading food delivery services to take part in the Atlas Challenge and provide information about their sustainable food strategies. The first step was to have them fill out a questionnaire which helped us understand their sustainable food strategies through a number of questions and by assessing their CSR reports if this was made available. FOUR PAWS demanded companies to play a positive role by diversifying their offered food, reduce the quantities of meat and increase plant-based food and innovative products, aligned within specific categories:

- Diversifying their product range
- Implementing marketing strategies that encourage increased consumption of plant-based and innovative food
- Setting long-term strategies
- Setting concrete commitments towards reducing meat as part of their policy / Corporate Social Responsibility (CSR)

The ranking was based on a detailed questionnaire which was filled out by only 5 of the 14 contacted companies operating in different countries worldwide (Deliveroo, Just Eat, Foodora, Delivery Hero and TakeAway) and given a total score based on the answers provided. Additional scores were given for open communication and transparency. For the non-responsive companies, FOUR PAWS evaluated them through an analysis and research based on publicly accessible information online which took place between May and November of 2019.

The maximum number of points which could be achieved was 92 points. None of the companies reached the highest score indicating the need for change as 93 % scored low to average with only JUST EAT scoring as 'good'.



## 5. RESULTS

More than 85 % of delivery services have current strategies implemented towards climate and environmental protection. However, the analysis showed that none of the food delivery services have a written commitment, statement nor policy in place which supports the importance of meat reduction to help combat climate change and environmental destruction through a clear focus on meat reduction. Overall, 43 % of the companies scored low, 50 % reached the average score and only 1 company resulted as good.\*

The results show that there is much needed room for improvement. Although meat reduction and an increase of plant based food can be highlighted through affiliated health programmes, environmental 'world days' or affiliated associations with organisations, no concrete actions are taken into consideration when it comes to the specific reduction of meat – a way to lower the environmental "footprint" as it is known today. Although delivery services are essentially an online platform, the possibilities it encompasses through

consumer influence and partnering restaurants is huge and can most definitely include activities to promote animal and climate friendly food options and practices. None of the delivery service companies have implemented a clear meat reduction strategy in order to reduce the impact on the climate and the planet which at the same time benefits the millions of factory farmed animals.

Although some companies acknowledge that changes are necessary, with Just Eat stating "animal agriculture is responsible for more greenhouse gases than all the world's transportation systems combined, and that meat production continues to be a challenge for our environment"\*\*, none have yet taken action by signing the FOUR PAWS Atlas Challenge commitment to put various measures into place. FOUR PAWS is hopeful that with the already existing positive initiatives in place by some companies, others will follow suit and that all commit to a reduction of meat, and an increase of plant-based products for a better planet.












### INDICATOR OVERVIEW: THE FOUR PAWS ATLAS CHALLENGE

#### Poll of meat reduction as an approach to a sustainable and innovative strategy

The table on the following page provides an overview of the indicators for each delivery service company which the ranking is based on. For the assessment, the indicators were divided into four different sections.

✓ = Yes ✗ = No ○ = No information could be publicly found within the allocated research time

#### Delivery Services in the poll and where they are operating

	<b>Delivery Hero</b>	40+ countries internationally in Europe, Asia, Latin America, the Middle East
	<b>Mjam</b>	Austria
	<b>Foodora</b>	Austria, Canada, Finland, Norway, Sweden, Philippines
	<b>Foodpanda</b>	13 countries in Asia and Eastern Europe
	<b>Uber Eats</b>	North America, South America, Europe, Africa, Asia, Australia, New Zealand
	<b>Just Eat</b>	United Kingdom, Australia, Brazil, Denmark, France, Ireland, Italy, Canada, Mexico, Norway, New Zealand, Spain, Switzerland
	<b>Deliveroo</b>	United Kingdom, Belgium, France, Italy, Ireland, Netherlands, Spain, Dubai, Singapore, Hongkong, Australia
	<b>TakeAway</b>	leading position in the Netherlands, Germany, Belgium, Austria, Poland, Bulgaria and Israel; is also present in Switzerland, Luxembourg, Portugal and Romania
	<b>Grubhub</b>	United States of America, London
	<b>Doordash</b>	United States of America, Canada
	<b>Swiggy</b>	India
	<b>Zomato</b>	India
	<b>Meituan Waimai</b>	China
	<b>Talabat</b>	Middle East

Disclaimer: May 2019 till November 2019 reflects the careful research effort of FOUR PAWS. Any changes in the assessed companies which took place after the 11th of November 2019 and which may affect the ranking results, have not been taken into account.



\* Based on the questionnaire filled in addition to open and cooperative communication with FOUR PAWS thus providing additional information.

\*\* As stated by Just Eat UK in response to the questionnaire



## CSR / Annual Report / Philosophy

Does the company have sustainable ("green") and / or progressive food strategies in place (towards reducing animal-based protein)?

1	Accessibility of annual report	✓	✓	✗	✓	✓	✓	✗	✓	✓	✗	✗	✓	✓	✓
2	Sustainability is part of the annual report	✓	✓	✓	✓	✓	✓	⊖	✓	✓	⊖	✗	✓	✓	✓
3	Statements on business responsibility to reduce the impact on the planet	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
4	Commitments / Statements on environmental sustainability to help the planet and climate	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
5	Concrete statements on plant-based proteins	✓	✗	✗	✓	✗	✓	✓	✗	✗	✗	✗	✓	✗	✗
6	Support plant-based innovative food products which replaces animal-based foods	✓	✗	✗	✗	✗	✓	✓	✗	✗	✗	✗	✗	✗	✗
7	Regional food and / or traceability of food supply	⊖	⊖	⊖	⊖	✓	✓	⊖	⊖	⊖	⊖	⊖	✓	⊖	✗

## Marketing

Does the company give incentives to consumers to opt for plant-based or vegetarian dishes?

1	Differences towards marketing tactics between meat and vegetarian / vegan dishes	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
2	Link plant-based food to environmental world days / initiatives / programmes / organisations	✓	✓	✓	✓	✗	✓	⊖	✗	✓	✓	⊖	✓	✓	✗
3	Promote healthy food choices (non-animal-based food)	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	⊖	✓	✗	✓
4	Promote innovative plant-based food products and meat substitutes	✓	⊖	⊖	⊖	✓	✓	✓	✗	✓	✗	✗	✗	✗	✗

## Product Range

Variety of food (non-animal based) that the company offers

1	Offer vegan food	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2	Offer vegetarian food	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
3	Offer meat substitutes / alternatives	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
4	Offer plant-based innovative products (e.g. Beyond Meat burger)	✓	✓	✓	✓	✓	✓	✓	⊖	⊖	⊖	⊖	⊖	⊖	✓

## Future Commitment / Progress

Is the company willing to develop and implement solutions in the near future?

1	Willing to expand their portfolio towards a more plant-based one	✓	⊖	⊖	⊖	⊖	✓	⊖	✗	⊖	⊖	⊖	⊖	⊖	⊖
2	Willing to commit to a statement that meat reduction is important	✓	⊖	✗	⊖	⊖	✓	✓	✓	⊖	⊖	⊖	⊖	⊖	⊖
3	Commitment to include and / or increase plant-based offerings	✓	✓	✓	✓	⊖	✓	⊖	✗	⊖	⊖	⊖	⊖	⊖	⊖
4	Willing to include plant-based innovative food products	✓	⊖	⊖	⊖	⊖	✓	⊖	✓	⊖	⊖	⊖	⊖	⊖	⊖
5	Willing to start and / or expand their affiliations with programmes which support the reduction of meat	✓	⊖	✗	⊖	⊖	✓	✓	✓	✓	⊖	⊖	⊖	⊖	⊖

## Additional Remarks

i.	Responded / cooperative contact	✓	✗	✓	✗	✗	✓	✓	✓	✗	✗	✗	✗	✗	✗
ii.	Transparency of information	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✗	✓	✓	✓



## 6. WHAT'S NEXT?

FOUR PAWS is looking forward to a positive exchange with the food delivery services who are willing to support the integration of more sustainable food strategies to reduce the amount of meat and increase vegan and plant-based innovative products by signing the commitment letter along the following scopes by 2023:

- Implementing concrete measures on promoting meat reduction in the CSR or separate policy which includes a clear statement highlighting the environmental and animal welfare benefits of meat reduction.
- Promoting plant-based meat alternatives and plant-based products / dishes amongst consumers to highlight animal- and environmental-friendly food, through platform specific marketing and menu layout.\*
- Spreading awareness on the importance of meat reduction which benefits the planet, through at least two health / environmental / animal welfare initiatives.\*\*
- Incorporating a more refined search function on the platform, to find specific dishes as opposed to general cuisines.
- Urging new and existing partnering restaurants to offer plant-based and meat substitutes dishes whilst reducing their meat offerings, (just like recyclable packaging, opting out of plastics and utilizing paper bags is currently being encouraged).

Since the food delivery sector is a rising market, FOUR PAWS sees a big potential to set a positive sign for animals and the planet by supporting consumers in making more climate- and animal-friendly food choices.

While the Atlas Challenge ranking represents the first results in the published ranking, FOUR PAWS will continue monitoring the changes and steps taken by food delivery services in future and urge them to sign the commitment letter which assures the general public and fellow food industry players, that they are in line with positive progressive changes.

### CONTACT DETAILS

For further information about The Atlas Challenge or if you wish to be a pioneer in the food industry by reducing meat and increasing innovative plant-based offerings, please get in touch at:

[TheAtlasChallenge@vier-pfoten.org](mailto:TheAtlasChallenge@vier-pfoten.org)



©Kalinovsky Dmitry, 2012

\* Depending on existing marketing tools the company utilizes, plant-based / meat substitutes are highlighted in this scope given priority on being at the top of the menu or advertised in one's own blog and / or newsletter.

\*\* Initiatives such as Meatless Mondays, Health / Green week, participating on Earth Day, climate awareness etc.

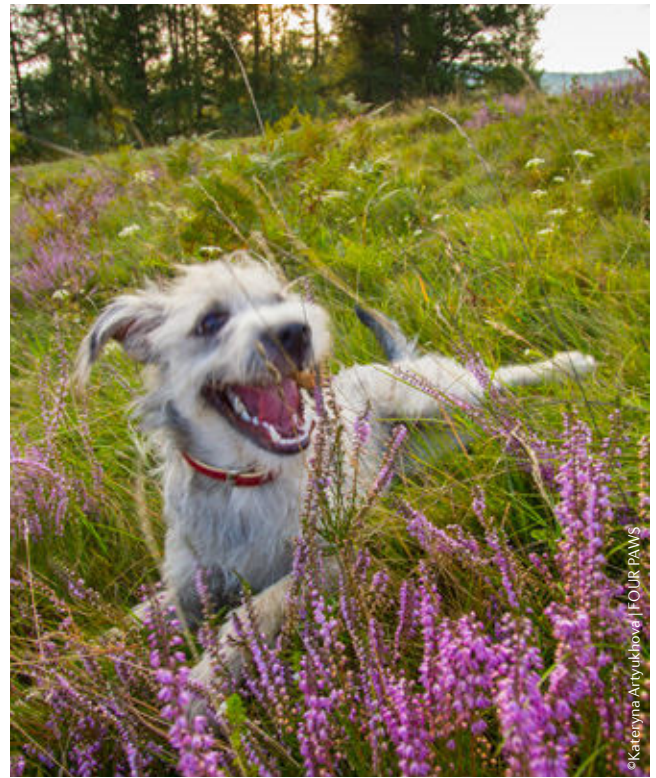


## 7. REFERENCES

- Center for Sustainable Systems-University of Michigan <http://css.umich.edu/factsheets/carbon-footprint-factsheet>
- Compassion in World Farming [assets.ciwf.org/media/7432824/ciwf\\_strategic-plan-revise18-lr2.pdf](https://assets.ciwf.org/media/7432824/ciwf_strategic-plan-revise18-lr2.pdf)
- EarthSave Healthy People Healthy Planet: [www.earthsave.org/environment.htm](http://www.earthsave.org/environment.htm)
- [www.fao.org/3/a0701e/a0701e00.htm](http://www.fao.org/3/a0701e/a0701e00.htm)
- [www.fao.org/news/story/en/item/197623/icode](http://www.fao.org/news/story/en/item/197623/icode)
- [www.fao.org/fileadmin/user\\_upload/fsn/docs/Wirsenius\\_et\\_al\\_Agric\\_Syst\\_\\_Land\\_use\\_in\\_2030.pdf](http://www.fao.org/fileadmin/user_upload/fsn/docs/Wirsenius_et_al_Agric_Syst__Land_use_in_2030.pdf)
- Food and Agriculture Organization of the United Nations (FAO) 2017. The future of food and agriculture: Trends and Challenges. Rome.
- [www.foodpanda.sg/contents/foodpandacares](http://www.foodpanda.sg/contents/foodpandacares)
- The New Yorker: [www.newyorker.com/magazine/2019/09/30/can-a-burger-help-solve-climate-change](http://www.newyorker.com/magazine/2019/09/30/can-a-burger-help-solve-climate-change)
- [www.ourworldindata.org](http://www.ourworldindata.org)
- Willet et al. 2019. Food in the Anthropocene: the EAT-Lancet Commission on healthy diets from sustainable food systems.
- What we eat matters: To change climate crisis we need to reshape the food system  
[www.theguardian.com/commentisfree/2019/oct/08/climate-change-food-global-heating-livestock](http://www.theguardian.com/commentisfree/2019/oct/08/climate-change-food-global-heating-livestock)

# ABOUT FOUR PAWS

FOUR PAWS is the global animal welfare organisation for animals under human influence, which reveals suffering, rescues animals in need and protects them. Founded in 1988 in Vienna by Heli Dungler, the organisation advocates for a world where humans treat animals with respect, empathy and understanding. FOUR PAWS' sustainable campaigns and projects focus on farm animals, companion animals and wild animals – such as bears, big cats, orangutans and elephants – kept in inappropriate conditions, as well as in disaster and conflict zones. With offices in Australia, Austria, Belgium, Bulgaria, Germany, Kosovo, the Netherlands, Switzerland, South Africa, Thailand, Ukraine, Hungary, the UK, the USA and Vietnam, as well as sanctuaries for rescued animals in twelve countries, FOUR PAWS provides rapid help and long-term solutions. The work of FOUR PAWS is based on substantiated research and scientific expertise, as well as intensive national and international lobbying. The goal of FOUR PAWS' campaigns, projects and educational work is to inform the general public about animal suffering and to bring about long-term improvements – enshrined in legislation.



©Kateryna Artukhova | FOUR PAWS



©FOUR PAWS



©FOUR PAWS | Nanang Sujana

## VIER PFOTEN International

FOUR PAWS

Linke Wienzeile 236, 1150 Vienna, Austria

T: +43 1 545 50 20 0, F: +43 1 54550 20 99

E-Mail: [office@four-paws.org](mailto:office@four-paws.org)

[four-paws.org](https://www.four-paws.org) [facebook.com/fourpaws.org](https://www.facebook.com/fourpaws.org)

[twitter.com/fourpawsint](https://twitter.com/fourpawsint) [youtube.com/fourpawsinternational](https://www.youtube.com/fourpawsinternational)

[instagram.com/four\\_paws\\_international](https://www.instagram.com/four_paws_international)