



Strengthening responsible supply chains

A WWF case study on retailers and berries in Doñana. Fruit Attraction
October 2026

12:30 – Introduction and welcome Celsa Peiteado, Head of the Food Programme, WWF Spain

12:35 – Doñana and the role of retailers

Enrique Segovia, Conservation Director, WWF Spain

12:40 – Results of the assessment of berries and retailers in Doñana

Guido Schmidt, Senior Consultant, Fresh Thoughts Consulting GmbH

12:55 – Positive actions and measures to ensure sustainable sourcing of berries in Doñana

- Heiner Matthei, Managing Director, EDEKA Fruchtkontor Spain
- Sophie Harrison, Water Specialist, WRAP
- Felipe Fuentelsaz, Markets and Standards Coordinator, WWF Spain

13:15 – Questions and answers

13:25 – Conclusions and closing



Dr. Guido Schmidt

Senior Policy Expert

Fresh Thoughts Consulting GmbH



Enrique Segovia

Conservation Director

WWF Spain



Sophie Harrison

Water Specialist

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Celsa Peiteado

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EDEKA Zentrale Stiftung & Co. KG



Felipe Fuentelsaz

Head of Markets and Standards

WWF Spain

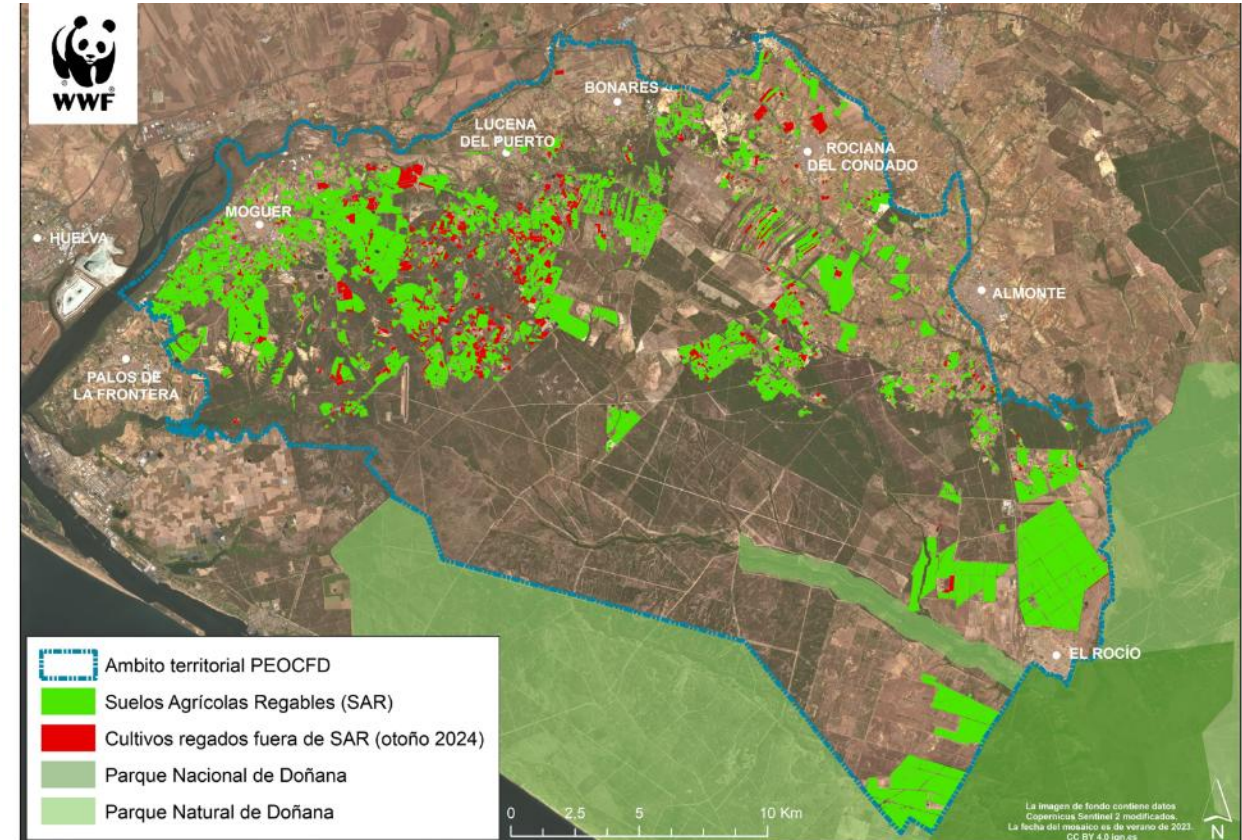
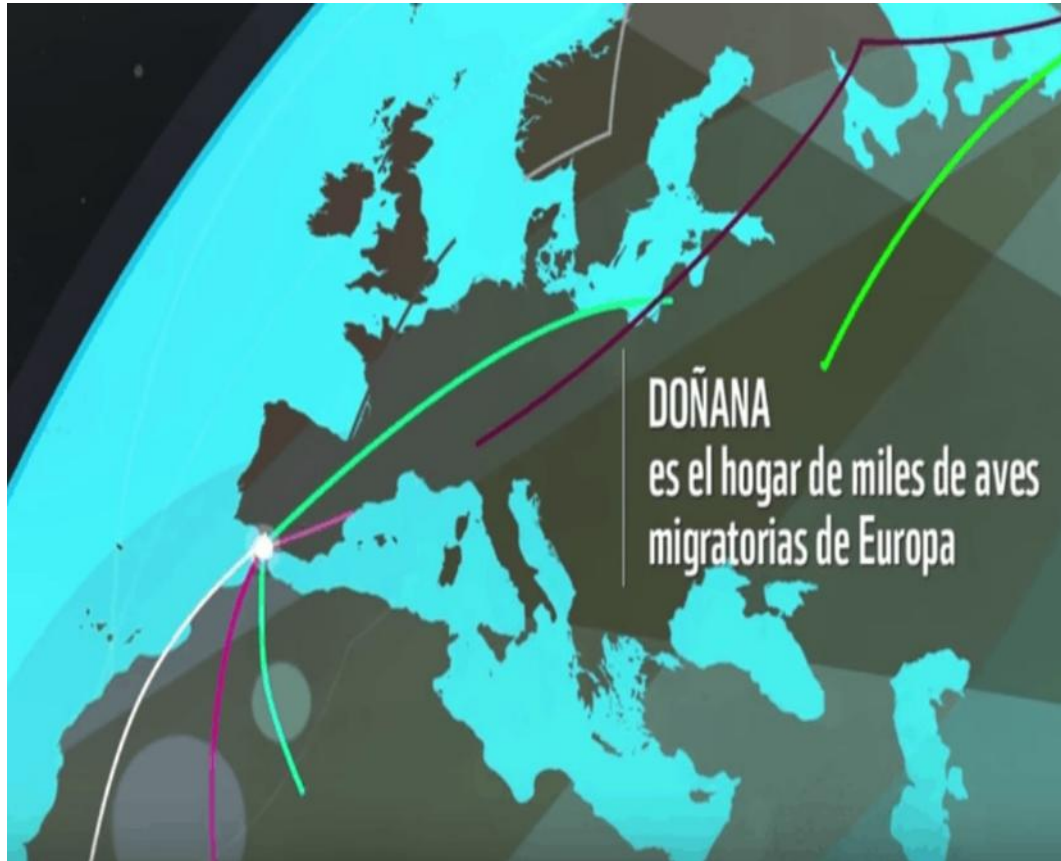
Speakers

Why WWF assesses retailers' performance in sourcing legal and sustainable berries from Doñana

Enrique Segovia, WWF



Context: news from WWF Spain



Doñana, a strategic site

A just transition towards sustainable food systems is urgent and a priority

A shared vision and the participation of all actors in the chain

WWF Berry Assessment 2026

Dr. Guido Schmidt

Fresh Thoughts Consulting GmbH



Objectives of the berry assessment

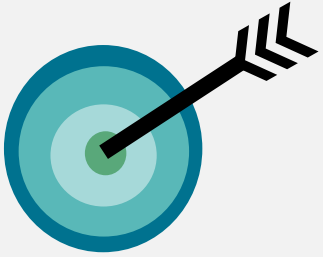


Assess how retailers ensure that berries from Huelva (Spain) are produced in a fully legal way.
Labour or social aspects are not assessed.

- **Transparency about current practices**
- **Differences in ambition and implementation**
- **Visibility for good practices**
- **Specific areas for improvement to reduce risks**
- **Encourage pre-competitive collaborative approaches and collective action**
- **Propose recommendations**
- **Contribute to the protection of sensitive ecosystems**

We want to drive
engagement across
the whole sector

Methodology and assessment criteria



Approach:

- Scope: berry sourcing from the **Doñana** landscape (“Corona Forestal”)
- Period: mainly the **2025-2026 season**



Outcome: the report will make it possible to:

- Define **needs**
- Provide an **overall assessment** of the retailers listed against the strategic questions of the assessment
- Present **options for action**

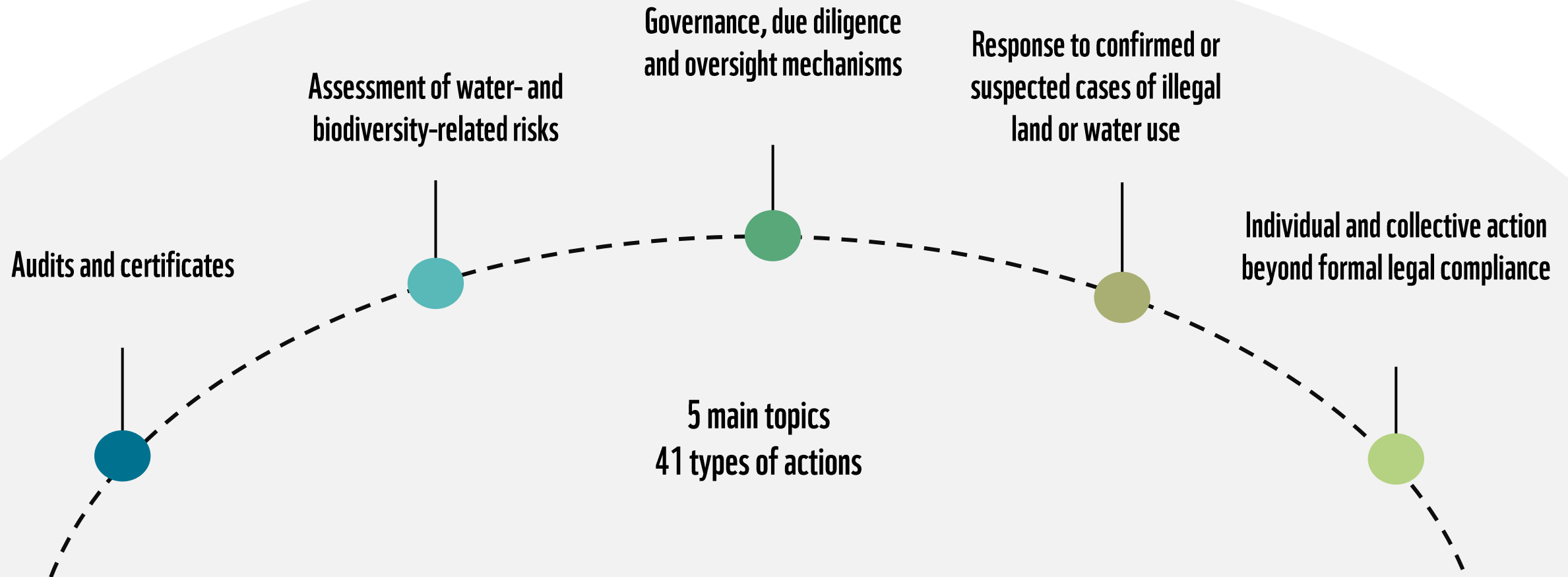


Assessment: how we evaluate

- Analyse the **actions taken** to date by retailers
- **Verify the evidence** through supporting documentation shared
- Online **meetings**



Assessment structure and criteria



Responses to the 2026 Berry Assessment



WWF contacted 22 retailers from five European countries for the assessment.

12+1 retailers actively participated in the 2026 Assessment

Responded	Partially responded	Did not respond
Switzerland: Migros, COOP, Denner	UK: ASDA	Spain: Mercadona; Eroski; El Corte Inglés
Austria: Billa; Spar Austria		UK: Tesco; Co-op UK; Sainsbury's; John Lewis/Waitrose; Morrisons UK; Marks & Spencer
Germany: Aldi North; Aldi South; EDEKA & Netto M-D; Kaufland; Lidl (international buying); REWE		
UK: Ocado Retail		

What assurances do retailers provide on the legality of their sourcing?



- **Retailers rely on standards and certifications.** However, the level of ambition and the requirements vary considerably between them: legal land use, volume of water consumed, certificate grouping.
- Some retailers have developed complementary and more demanding verification systems, based on additional audit modules and internal or external field checks.

Advanced tailor-made legality processes	Coop Switzerland, Migros
Certification + additional checks	Aldi Nord, Aldi South Group, Billa, Denner, EDEKA & Netto, Kaufland, Lidl, Ocado Retail, REWE, ASDA
Certification only	Spar Austria
No response	El Corte Inglés, Eroski, Mercadona, John Lewis/Waitrose, Morrisons UK, and Marks and Spencer, Tesco, Co-op UK and Sainsbury's

- Many retailers still **struggle to set priorities, criteria and the scope** of complementary verification.

Detailed results



	Advanced
	Established
	Progressing
	Beginning

[illegible]

[illegible]

Avoid pressures: Ensuring legal sourcing



- Supplier **contracts** refer to compliance with the law.
- **Clear procedures to respond to non-compliance**, take corrective measures and set up escalation mechanisms...
- Easy access to producers' names, ...
- ... but **not to the location** of all plots.
- Work still pending to verify the legal use of:
 - **forest land and ecological corridors**
 - **water consumption**
- No public disclosure of legal compliance.

Reduce impacts through supply chain management

[illegible]

Reduce impacts through supply chain management



- All retailers have carried out a **risk assessment** of their supply chain; half have assessed their chain's pressure on Doñana.
- Almost all have an action plan or protocol to drive supply chain sustainability.
- Retailers actively encourage their suppliers and producers to reduce water abstractions and to restore forest areas and/or ecological corridors; half support them financially or by other means.
- Almost all retailers prioritise or reward suppliers with good agricultural practices and/or on-farm sustainability: producers are often regarded as “partners”.

Restore and regenerate in Doñana



Nr	Topic	Aldi Nord	Aldi South Group	Billa	Coop Switzerland	Denner	EDEKA & Netto M-D	Kaufland	Lidl	MIGROS	Ocado Retail	REWE Group	SPAR Austria
33	Collective action platforms												
34	Collective action (financial contributions)												
35	Collective action projects (in-kind contributions)												

A growing number of retailers support collective action platforms.

Some have supported ecological restoration projects, in kind (knowledge, training) or financially.

The size of contributions has not been analysed.

Transform: Driving change through advocacy

[illegible]

Transform: Driving change through advocacy



- Most retailers are demanding, but reluctant to act individually to call on the authorities for ecological restoration of river corridors and better enforcement of the law on land and water use.
- Most retailers supported WWF Spain in its 2023 advocacy campaign against the regional government's proposed amnesty in the pre-election period.
- Some retailers have taken part in collective actions on these issues, such as the Alliance for Water Stewardship's Collective Action Accelerator in Huelva.
- Almost all retailers have taken action to improve how certification standards develop and address legal land and water use.

2026 Berry Assessment: Overall results



	Aldi Nord	Aldi South Group	Billa	Coop Switzerland	Denner	EDEKA & Netto M-D	Kaufland	Lidl	MIGROS	Ocado Retail	REWE Group	SPAR Austria
Avoid												
Reduce												
Restore												
Transform												

	Advanced
	Established
	Progressing
	Beginning

- No “green” rating because Doñana's problems are not yet solved
- Solving them is a shared responsibility of producers, buyers, retailers and public authorities
- Among participating retailers, the level of knowledge, commitments and solutions varies, although it is increasing
- Despite the gaps and the uneven quality of their implementation, certifications remain the main tool

Positive actions for sustainable berry sourcing in Doñana

Heiner Mattei. EDEKA

Sophie Harrison. WRAP

Felipe Fuentelsaz. WWF



Securing legal water use for the long term!

EDEKA's approach in the Corona Forestal area of Doñana

Fruit Attraction 2026 (Madrid) 06.10.2026 | Heiner Matthei | Director EDEKA Fruchtkontor Spain



3,200 independent retailers: entrepreneurship is indivisible!



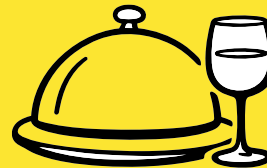
100%
entrepreneurial
freedom



Designing stores
and creating
complete shopping
experiences



Developing local
assortments
and service offerings



Integrating food service
concepts



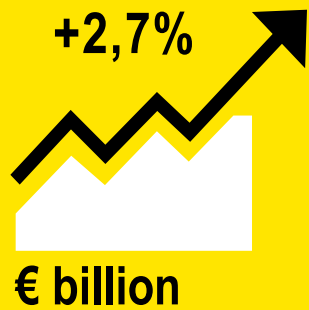
Local
employers and
trainers



Companions in
everyday life in the
neighbourhood

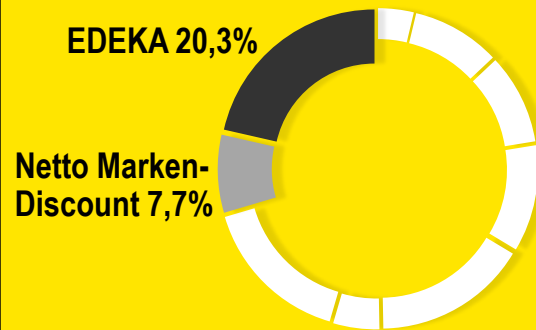
Total sales

77.300



Market share

28,0 %



Stores

10.871



Employees

417.500



20.900
Apprentices

Figures: as of December 2025

KEY TOPICS

FOR GREATER
SUSTAINABILITY

Climate change



Biodiversity



Resources and materials



Water



EDEKA and the WWF: Strong
partners for over 15 years now.



Address water-related risks, increase transparency and apply a comprehensive stewardship approach in priority regions.

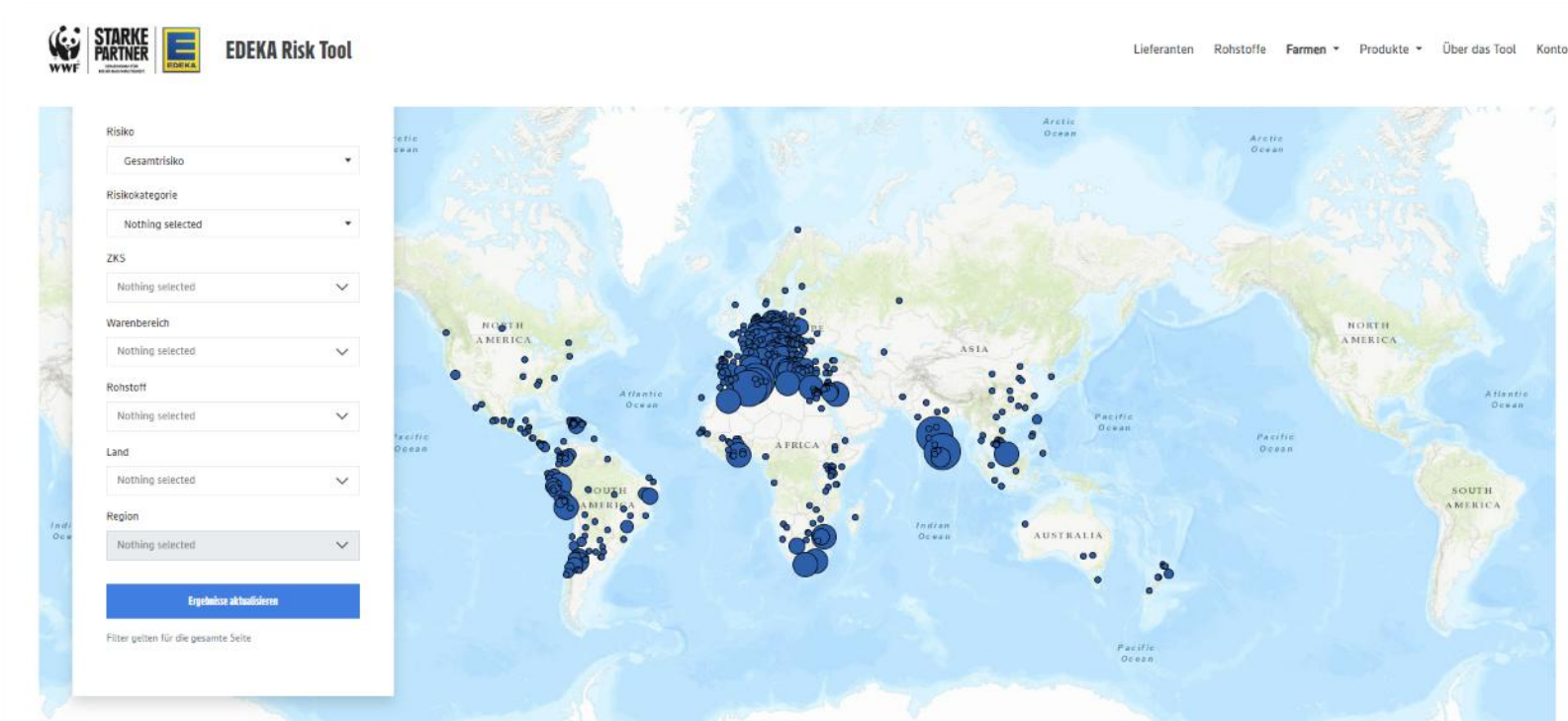


Topic objectives

Water

- Knowledge of risks and opportunities in own-brand products
- Implementation of measures to minimise water-related risks
- Water stewardship projects in areas of high water risk

Transparency: water-related risks of EDEKA own-brand products are recorded using scientific data



- **More than 30,000 producers registered in the tool**
- **Around 90% of fruit and vegetable sales volume has been analysed**
- **More than 70% of EDEKA's fruit and vegetable suppliers are located in areas with high water risk.**

Ensuring legal water use through a range of measures is a core part of EDEKA's business



1. Binding agreements with suppliers ensure certification under internationally established, expert-recognised standards and verification systems.



2. Active participation of our suppliers in pre-competitive multi-stakeholder initiatives and in collaborative joint shaping.



3. Support from a certification body and an external consultant to establish a long-term, market-oriented approach and ensure legal water and land use in the Doñana region.

Wir  Lebensmittel.



Water stewardship in southern Spain: Designing collective actions

UK FOOD AND
DRINK PACT



Promoted by



Implementation and
coordination



In collaboration
with



Companies supporting the project



Water Stewardship Programme in southern Spain: Designing collective actions

- Initiative with a long-term vision – 2030
- Channels the interest of European markets towards sustainable fruit and vegetable production
- Considering environmental interests, those of producers and their value chain, and local actors
- Building on existing efforts and public policies on sustainability



Context: where does the idea of creating a collective action platform come from?

Overall objective:

Contribute to improving the health and resilience of river basins and their ecosystems

“The client is the basin”

Objectives of the collective action platform for water up to 2030



Promoting water
stewardship in
practice



Ensure legal water
and land use



Manage scarcity and
quality risks through
GAPs



Improve the status of
water bodies and
ecosystems

Development principles of the Collective Action Platform

Basin
approach

Neutral –
apolitical

Basic
legality

Scientific
evidence

No
duplication
of efforts

Transparency
and
inclusiveness

Local
leadership

Stimulating action at different levels

UK FOOD AND
DRINK PACT



Ongoing collaboration to support and scale up the application of action frameworks and related projects in the Mar Menor and Doñana, and technical committees of portals/repositories.

Collaboration to build capacity, dialogue spaces and training on Good Agricultural Practices

AWS: Joining efforts and amplifying synergies between the Collective Action programme and the AWS Accelerator programme.



Collaboration to ensure supermarket sourcing from farms that are 100% legal in water and land use

Condado de Huelva Irrigators' Community: Agreement to support the restoration of the La Cañada ecological corridor

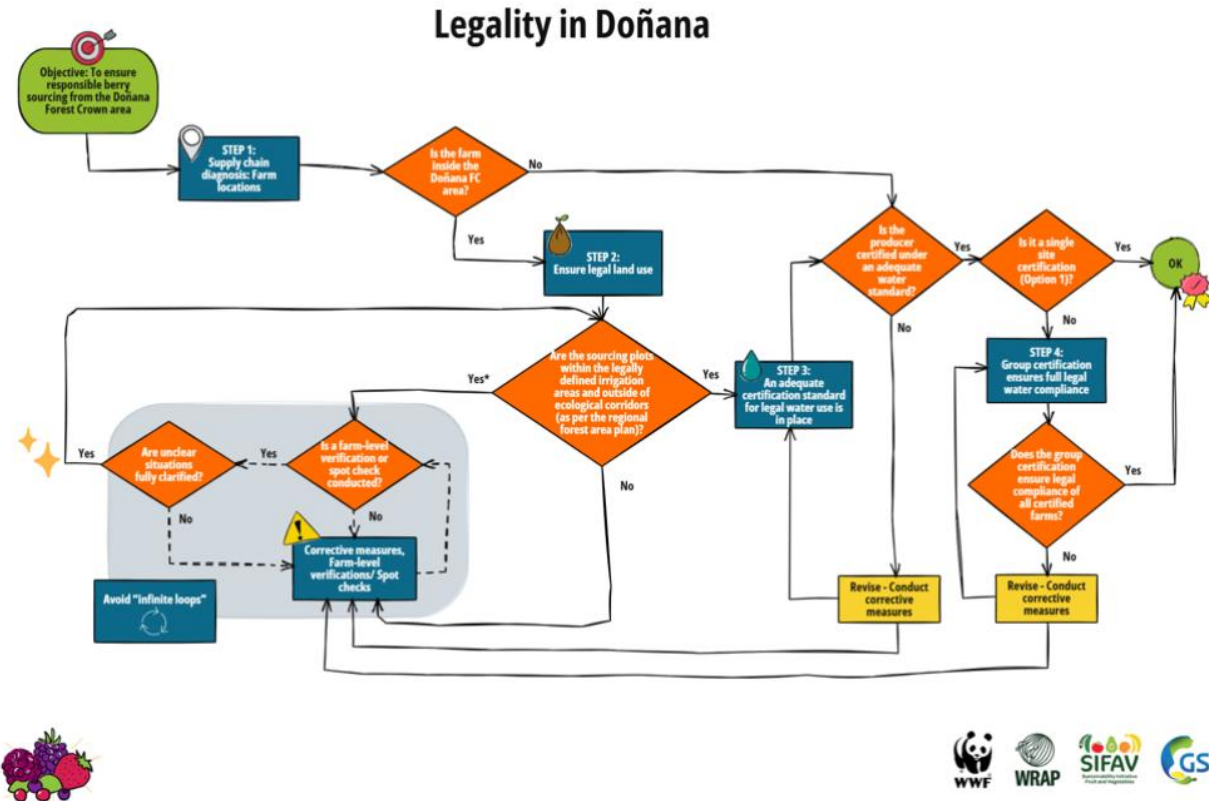


Embassy of the Netherlands in Spain/Wageningen Univ.: Support for a parallel project on sustainable practices in berry production in Doñana.



Doñana/Huelva collective action Platform.

WWF proposals: ensuring environmental legality



Environmental legality flow chart
Spanish Environmental legality in Doñana
English

<https://www.youtube.com/watch?v=apZ79EI1Mo&feature=youtu.be>

More information: Guide to legal water use (2024 update) | WWF Spain

WWF proposals: Training and outreach – WWF Classroom



WWF proposal: The importance of standards



WWF Spain **assessment of certification standards** regarding legal land and water use of **berry farming in Doñana**

	GLOBALG.A.P.	SPRING	AWS	CAAE LEGAL WATER	FSA GOLD	LEAF	PLANET PROOF	EU Organic farming	BIOSUISSE	NATURLAND	DEMETER
Legal land use		* ₁			* ₁						
Legal water use	* ₂	* ₂		* ₂			* ₂				
Compliance with water allocation											

*

Compulsory criterion for obtaining the certificate

Non-compulsory criterion

Minor reference included or recommendation

Not mentioned

Though the standard covers this criterion as compulsory at a general level, this is not fully guaranteed for all plots in the Doñana area due the specific land use restrictions and ensuring that the plots are inside the legal area in the Doñana Special Management Plan official mapping (*1) or this is not fully guarenteed for all plots in the Doñana area in case of group certification (*2)

Note: analysis carried out for the Doñana context by WWF Spain (July 2025). An update is pending shortly.

Work on the ground



FARO Project: Agroecological farms for resilience and the territory | WWF Spain

Questions and answers

Conclusions and recommendations

Celsa Peiteado,
WWF



Conclusions



A just transition towards sustainable food systems: urgent, necessary and a priority

Cooperation of all actors is essential (production, intermediaries, retail, consumption, etc.)

Next steps:

Shared vision

Reorient public and private policies (retailer purchasing protocols)

Improve standards and field controls on legality

Support and training

Collective actions

And beyond, nature restoration

More information:
Felipe Fuentelsaz, WWF Spain
agrofelipe@wwf.es

WWF together it is possible

Presentation available at
this link:





WWF®

Annex Detailed results



Avoid (1/2)

[illegible]

Avoid (2/2)

[illegible]

Reduce

[illegible]

Restore

[illegible]

Transform

[illegible]

Aggregated Results

[illegible]

Methodological annex



Annex: Survey – methodology



Methodology and Limitations

The assessment is based on a structured questionnaire distributed to the selected European food retailers, designed to capture information on policies, supplier requirements, risk management processes, monitoring practices, and remediation mechanisms related to sourcing from the Doñana region.

To complement and validate the responses, follow-up interviews were conducted with participating retailers. These interviews provided an opportunity to clarify responses and gather additional context. To ensure a neutral and independent assessment, WWF engaged Fresh Thoughts Consulting GmbH to conduct the assessment.

Despite these efforts, analysis relies on self-reported information provided by retailers, which may not always fully reflect actual practices. The level of detail and transparency varies between participants, which can affect comparability. While interviews helped to address gaps and ambiguities, not all responses could be independently verified. As a result, the findings should be interpreted as an informed overview of current approaches rather than a comprehensive or fully verified account of all selected retailer practices.

Another important limitation is that this version has not been able to cover all major supermarkets in countries with significant purchasing volumes, such as France, or in key markets from a quality perspective, such as the Netherlands and the Nordic countries.

Section 1: What expectations and requirements do retailers set for berry suppliers regarding the legal use of land and water, via audits and certificates?

- 1: Mapping (producers): Do you have an updated list of all your suppliers and producers?
- 2: Mapping (plots): Do you have an updated map of all your supplying farm plots?
- 3: Water permits: Are all your contracted suppliers/producers certified by water-specific standards?
- 4: Water abstractions (flow meters) Are all your contracted suppliers/producers certified with a compulsory criterion against the existence of non-tampered flow meters?
- 5: Water abstractions (compliance): Are all your suppliers/producers certified with a scheme that mandates compliance with legal water abstraction volumes?
- 6: Legal land use (forest and non-irrigable): Are all contracted suppliers/producers certified (with compulsory criteria), or have they undergone an audit/analysis against any supplying plots located in a protected forest area or in non-irrigated areas?
- 7: Land use (corridors): Are all contracted suppliers/producers certified with a compulsory criterion against any supplying plot being located in an ecological corridor/protected riparian area?

Annex: Base survey



Section 1: What expectations and requirements do retailers set for berry suppliers regarding the legal use of land and water, via audits and certificates?

8: On-site checks: Do you request audits of additional checks of legal land use to be undertaken? And if yes, are these based on official maps and, in case of doubts, on-site visits?

9: Certification grouping: Do you have a group certification in place which reliably validates all group members/plots? Do you do you undertake complementary checks for all group member/plots that supply you? Are no supplies provided from certified groups? Is no group certification accepted for the contracted suppliers/producers?

10: Certification under conditions: Do you accept certificates for legal water and land use if the certification is not bound to any conditions for corrective action? Do you accept certificates for legal water and land use if the required corrective action has been implemented and validated by the certifier before initiating the season's supplies? Do you accept certificates for legal water and land use if it ensures that fruit is not sourced from plots or sections in a non-legal situation, when these are identified in farms with both regular and irregular parts?

11: Contingency sourcing Is contingency sourcing undertaken? Does contingency sourcing follow the same criteria as regular contracted supplies?

Annex: Base survey



Section 2: How systematically do retailers identify and assess water- and biodiversity-related risks in Doñana, as an example of ecologically important high-risk sourcing regions?

12: Footprint: Do you assess your supply chain pressures on Doñana?

13: Risk analysis: Have you undertaken an analysis of your risks due to your supply chain in Doñana?

Section 3: What governance, due diligence, and oversight mechanisms have retailers in place to address illegal use of land and water?

14: Governance (understanding): Have you internally explored legal risks in your supply chain and possible actions to be taken, involving different departments?

15: Governance (knowledge): Have you implemented specific knowledge-focused actions to support land and water legality beyond certification?

16: Governance (action plan): Have you adopted an action plan to ensure the supply chain's land and water legality?

17: Governance (engagement): Do you encourage one or more suppliers in actions to reduce water abstractions, restore forest areas or ecological corridors?

18: Governance (training): Do you request the supplier's/producer's technical staff to attend meetings and/or training on the legal water and land use in Doñana?

Section 3: What governance, due diligence, and oversight mechanisms have retailers in place to address illegal use of land and water?

19: Governance (support): Do you cooperate with and/or support actively one or more suppliers (economically or by other means) in actions to reduce water abstractions, restore forest areas or ecological corridors?

20: Due diligence: Do you include land and water legality as a requisite in the contracts with suppliers?

21: Due diligence: Do you require compliance with land and water legalisation in your supply contract?

22: Oversight: Do you carry out internal audits of purchasing practices in line with the company policy and/or agreed action plan?

23: Oversight (standards): Do you request improvements to certification standards to address legal use of land and water?

Section 4: How do retailers respond to confirmed or suspected cases of illegal land or water use in their supply chains?

24: Planning: Do you have a procedure or plan in place for such situations of confirmed or suspected cases of illegal land or water use?

25: Information: Do you request the supplier/producer - and potentially other parties, like the auditor, the competent authorities and/or other relevant actors - to provide complementary information on the case?

26: Statement: Do you request the supplier/producer to provide a written declaration of compliance?

27: Analysis: Do you request further audits of such cases if dealing with a suspected case?

28: Corrective action: Do you request and verify corrective action to conform to local regulation (e.g, closure of well, reduction of cropping area, restoration of corridor) taken by the supplier/producer?

29: Close-down: In the case that the illegal land or water use remains for more than 6 months, do you stop purchasing from the supplier/producer as soon as the contract allows for it?

Section 5: To what extent do retailers go beyond formal legal compliance to address structural water scarcity and ecosystem impacts

30: Direct supply chain (reward): Do you select or reward (e.g via better contract conditions) suppliers with good agricultural practices and/or farm sustainability?

31: Direct supply chain (disclosure): Do you report publicly and annually about the legal compliance of your supply chain and actions taken (if any)?

32: Collective action platforms: Do you participate as an observer in the WRAP collective action platform or similar?

33: Collective action platforms: Do you engage as a member in the WRAP collective action platform or similar?

34: Collective action projects (financial contributions): Do you contribute financially to specific collective action projects targeting ecological restoration?

35: Collective action projects (in-kind contributions): Do you contribute in-kind (please clarify how) to specific collective action projects targeting ecological restoration?

36: Collective action projects (financial contributions): Do you contribute financially to specific collective action projects targeting good agricultural practices?

Section 5: To what extent do retailers go beyond formal legal compliance to address structural water scarcity and ecosystem impacts

36: Collective action projects (financial contributions): Do you contribute financially to specific collective action projects targeting good agricultural practices?

37: Collective action projects (in-kind contributions): Do you contribute in-kind (please clarify how) to specific collective action projects targeting good agricultural practices?

38: Collective action projects (Contributions): Do you contribute financially or in kind (please clarify how) to other collective action projects?

39: Collective action projects (Advocacy): Do you support advocacy actions to improve control and reinforcement?

40: Collective action projects (Advocacy): Do you support advocacy action to improve ecosystem restoration?

41: Collective action projects (Advocacy): Do you support advocacy action to prevent amnesties?