

**Big
Emissions,
Empty
PROMISES**





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Introduction

As the world grapples with the climate crisis, cutting methane emissions has become an urgent priority.¹ Methane is a potent greenhouse gas - 80 times more powerful than CO₂ over a 20-year period² - and livestock farming, particularly red meat and dairy, is a major source. The Global Methane Pledge was launched in 2021 and calls for rapid reductions in methane, including from agriculture, to 'keep the goal of limiting warming to 1.5°C within reach.' It has 158 country participants at the time of writing, yet the critical national actions to build on the pledge, particularly relating to animal agriculture, are lacking.³

We need to reduce animal production and overconsumption. Scientists warn that halting fossil fuel use alone would not limit global warming to 1.5°C, nor possibly even 2°C target, and that addressing emissions from the food system is essential for maintaining these limits.⁴

Despite their substantial role in driving climate change, the impact of meat and dairy companies remains largely unknown to the public and overlooked by governments.⁵ Benefiting from 'agricultural exceptionalism', the sector has largely escaped scrutiny in global climate efforts,⁶ allowing some of the world's largest meat and dairy companies to continue high-emission operations with minimal oversight at

both national and global level. Big Meat's influence is clearly visible in the language of the Global Methane Pledge - a victory that the meat industry celebrated.⁷

This briefing zooms in on our previous work, *The New Merchants of Doubt*, by examining the emissions from 22 of the world's biggest meat and dairy companies. Through a detailed analysis of these corporations' emissions data, reduction commitments (or lack of them) and the policy frameworks in the countries where they are headquartered, we expose how a lack of regulation continues to undermine global climate goals. Our findings highlight an urgent need for regulatory frameworks that compel these corporations to reduce emissions and hold them accountable for their environmental impact.

1. Just how big are the emissions from Big Meat and Dairy?

While fossil fuel companies have been rightly scrutinised for their substantial contributions to the climate crisis, the meat and dairy industries have operated largely under the radar. However, this is beginning to change.

Various organisations have attempted to measure the emissions generated by Big Meat and Dairy to highlight its significant contribution to climate change.⁸ This effort is sorely needed. Publicly available data is often incomplete, inconsistent or, in many cases, entirely absent, and key information, such as annual production figures for meat and milk by region, is frequently unpublished or reported inconsistently over time. The estimated calculations have, however, shown staggering results.

A 2022 report by Changing Markets Foundation and Institute for Agriculture and Trade Policy (IATP) found that the combined greenhouse gas (GHG)



emissions of 15 of the biggest meat and dairy companies were higher than the emissions of Germany, equating for over 80% of the EU’s entire methane footprint.^{9,10} If these companies were treated as a country, they would be considered the tenth largest GHG-emitting jurisdiction in the world.¹¹ When compared to oil giants, these 15 companies’ combined emissions exceeded those of ExxonMobile, BP and Shell.

More recently, a report by Greenpeace International updated estimates for 29 major meat and dairy companies, revealing alarming findings.¹² It concluded that the combined methane emissions from five of the largest polluters - JBS, Minerva, Marfrig, Cargill and Dairy Farmers of America - surpass those of major fossil fuel companies such as ExxonMobil, Shell, TotalEnergies, Chevron and BP.¹³

In its latest report, *The New Merchants of Doubt*, Changing Markets examined the emissions and actions of 22 major meat and dairy companies across four continents.¹⁴ Figure 2 shows the reported GHG emissions of these big polluters, where they are available, and the estimated emissions where a company doesn’t report. To emphasise the scale of these emissions, we have included comparisons with emissions from relevant countries and corporations.

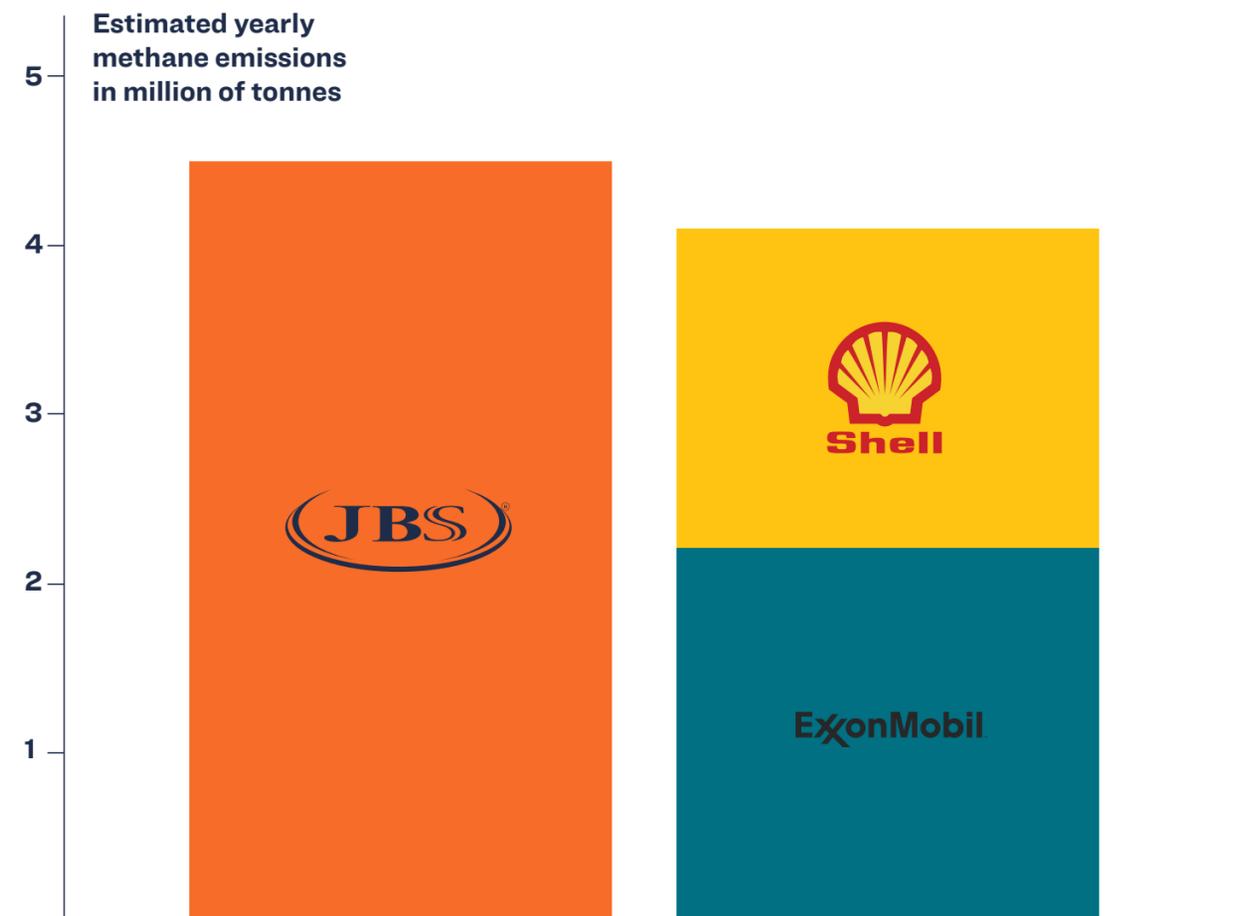
The true environmental impact of these companies is difficult to fully assess, as their self-reported emissions likely understate their actual contribution with many failing to disclose full supply chain (Scope 3) emissions. Two companies report no emissions data at all, while three others only provide data on Scope 1 and 2 emissions, despite the fact that company data shows that, on average, 95% of their total emissions fall within Scope 3.

These findings underscore an urgent need for transparency among major meat and dairy companies. Given the vast scale of their emissions, these companies must be required to monitor, report and verify their emissions across all scopes,

Figure 1: JBS emissions rival major oil companies

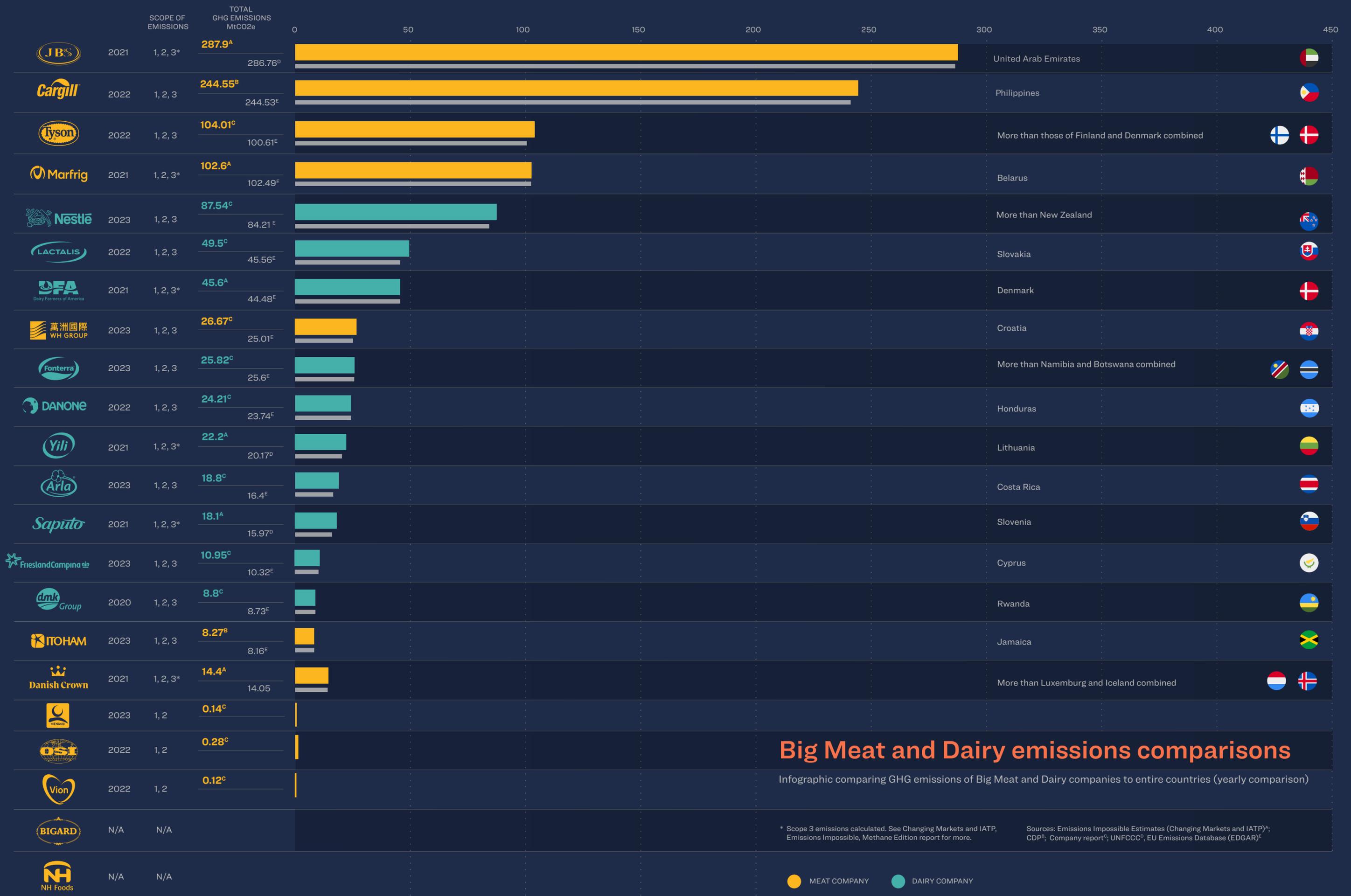
Source: Greenpeace. 2024. Turning Down the Heat.

JBS’ Emissions Rival major Oil Companies



and to reduce them. However, many are attempting to distract and delay taking responsibility through weak climate strategies and commitments, as revealed in the next section.

Figure 2: Big Meat and Dairy emissions comparisons



Big Meat and Dairy emissions comparisons

Infographic comparing GHG emissions of Big Meat and Dairy companies to entire countries (yearly comparison)

* Scope 3 emissions calculated. See Changing Markets and IATP, Emissions Impossible, Methane Edition report for more. Sources: Emissions Impossible Estimates (Changing Markets and IATP)^A; CDP^B; Company report^C; UNFCCC^D; EU Emissions Database (EDGAR)^E

MEAT COMPANY DAIRY COMPANY

2. Big claims, empty promises

The following analysis provides a concise overview of the climate plans and voluntary commitments of the 22 major meat and dairy companies listed above, highlighting their attempts to distract and delay genuine climate solutions.

Big Meat and Dairy excel at using greenwashing tactics to distract from their lack of climate action. From voluntary actions like weak net-zero targets to climate-friendly packaging claims, they promote an image of sustainability while their environmental impact continues to worsen, creating a 'green smokescreen' that misleads the public and policymakers into thinking progress is being made.

The Global Methane Pledge, as well as calling for national action plans, recognises the role that the private sector will need to play - a call the meat and dairy industries are failing to answer.



2.1 Net-zero targets

The Big Meat and Dairy industries are increasingly touting net-zero commitments and climate targets as part of their sustainability efforts. However, many of these commitments lack the transparency, specificity and actionable steps needed to substantively reduce emissions. While these companies set ambitious goals on paper, in practice, they often fail to provide clear, measurable actions, making it difficult to track actual progress and hold them accountable.

Of the 22 companies, only 15 had a net-zero target, and not all of these met the quality standards for net-zero pledges developed by the UN.¹⁵ From our analysis, we found:

JBS lacks any Scope 3 disclosures or reduction targets, which are essential for tracking true progress toward net zero. It faced a ban on its net-zero claims by a US advertising body in June 2023, which deemed its claims unsupported by credible plans.

Lactalis has committed to reporting on methane emissions under the Dairy Methane Alliance but hasn't set any specific targets for reductions, and it does not address Scope 3 emissions.

Cargill lacks a net-zero target altogether and has instead set a general, long-term climate target for the 2030s, aiming for a 30% intensity reduction in Scope 3 emissions without specifics on how this translates to absolute reductions.

DFA's net-zero target is based on a less ambitious 2°C compliance standard, raising questions about whether it can truly reach a net zero pathway.

2.1.1. Alignment with 1.5°C warming

According to UN's recommendations for a credible net-zero standard, net-zero pledges must be aligned with limiting global warming to 1.5°C.

Current data from the Science-Based Targets initiative (SBTi) showed:

- Of the 15 companies that have a net-zero target, only four have near-term targets aligned to 1.5°C, and only two companies' 1.5°C targets (Danone and Nestlé) are aligned to net zero. Nine companies on this list do not have an SBTi target that aligns with 1.5°C.
- Danone stands out as the only major company with a methane reduction target (30% by 2030) and an SBTi-aligned climate plan. This is a notable commitment in an industry with otherwise limited methane-specific targets.
- Only four companies (Arla, FrieslandCampina, Danish Crown and Vion) have 1.5°C aligned targets approved by SBTi for short-term emissions. However, they lack longer-term targets, while Arla, for instance, is only committing to intensity-based targets rather than absolute reductions.
- Two companies (Fonterra and DFA) align with less ambitious SBTi standards, targeting 2°C or below, inadequate for a true net-zero pathway.
- Three companies (Yili, Lactalis and Itoham) have either avoided SBTi participation or lack robust, approved targets.

While it is concerning that only two companies have had their net-zero plans approved by SBTi, even these may fall short of what's needed to reach net zero as concerns have been raised around the robustness of the initiative's validation process.

2.2 Relying on techno-fixes

Of the 22 companies analysed, 16 are pursuing techno-fixes such as feed additives and methane-reducing vaccines to mitigate emissions. Many of these approaches rely on intensive systems of animal agriculture to be effective and most are not yet approved for use at scale. Techno-fixes therefore cannot serve as a substitute for comprehensive emissions reductions. Even assuming that these technologies could enable the Global Methane Pledge to be met, our analysis reveals a lack of serious investment - the companies spend only around 1% of their revenue on research and development, despite talking up these efforts in their climate plans.

- Nestlé, Danone and Cargill are proponents of seaweed feed additives for methane reduction. Nestlé and Cargill have started investing in the industry's development of red seaweed, and Fonterra is developing 'Kowbucha', a probiotic additive with similar claims.
- Danone has further invested in methane vaccines, although the technology is still in developmental stages with unproven large-scale efficacy.
- Although JBS and Tyson promote techno-fixes in their PR materials to project an image of being 'green' and environmentally responsible, they invest very little in R&D compared to marketing budgets.
 - JBS spends just \$20 million annually on tech-based solutions like feed additives and vaccines - equivalent to 6.2% of its marketing expenditure, and just 0.03% of its 2022 annual revenue.
 - Tyson's \$283 million marketing spend in 2022 is nearly double the entire Tyson Ventures sustainability fund and 11 times larger on an annual basis, suggesting limited financial commitment to sustainability.

2.3 Greenwashing with regenerative agriculture

Regenerative agriculture is increasingly promoted in corporate climate strategies, but for many companies it serves more as a greenwashing tool than a genuine climate solution. It is primarily marketed as a method of carbon sequestration through practices like soil health improvement, cover cropping and rotational grazing.¹⁶ While these practices can sequester carbon in some cases, they are not a sufficient means of offsetting the emissions from industrial livestock farming. For example, a shift to grass-fed beef in the U.S. would result in a 43% increase in methane emissions.¹⁷

A recent study by New Climate Institute has warned that without clear guidelines and a robust framework, regenerative agriculture is at risk of being exploited as a tool to justify business as usual while meat and dairy companies present themselves as part of the solution.¹⁸

In our analysis we found six companies that make sustainability claims based on regenerative agriculture:

- Cargill and DFA are active in generating and selling carbon credits derived from regenerative practices. Cargill intends to sell these offsets to downstream buyers, further embedding its operations in carbon markets.
- Nestlé promotes 'carbon insetting', claiming emissions reductions by implementing regenerative agriculture within its supply chain. This approach enables it to offset emissions without comprehensive changes in its production.
- FrieslandCampina, Arla and WH Group also publicly back regenerative agriculture initiatives, framing these practices as beneficial but largely using them to offset emissions rather than reduce them directly.

2.4 The biogas illusion

Big Meat and Dairy industries are suggesting livestock farming can be environmentally beneficial through the production of biogas - energy generated from manure and agricultural waste. However, the incentivisation of biogas as a waste management and emissions reduction solution risks increasing emissions through further industrialisation of agriculture.¹⁹ The majority of methane emissions from cattle - 82% - come from enteric fermentation (cow burps), while manure management only accounts for 18%.²⁰ Climate plans focusing solely on manure management overlook the primary source of methane emissions. Promoting and using biogas as a viable solution to the methane emissions produced by Big Meat and Dairy is misleading.

- JBS and WH Group are some of the most prominent advocates of biogas. WH Group, via its subsidiary Smithfield, claims that biogas production can render it 'carbon negative' despite the limited role biogas plays in addressing overall emissions.
- Arla and JBS have lobbied for biogas support in the EU, presenting it as a solution to ammonia and waste management challenges. However, the environmental benefit is often over-emphasised; emissions leaks and upstream emissions mean the impact is negligible relative to the sector's full carbon footprint.²¹

2.5 Overall analysis

Despite net-zero pledges and the promotion of technologies like feed additives, biogas and regenerative agriculture, Big Meat and Dairy have so far failed to adopt strategies that tackle the full scale of its emissions. Solutions like carbon insetting and biogas are often presented as quick fixes that distract from the real issue: the need to reduce livestock production and consumption. These solutions can also worsen the situation. Biogas policies, heavily subsidised in Europe and the US, incentivise livestock expansion, directly contradicting climate goals.²²

Other technologies are not yet scalable or effective, serving more as a delay tactic than a path to meaningful change. Cargill, Nestlé, Fonterra and Danone promote feed additives like asparagopsis (red seaweed), yet these additives remain unapproved in their home countries. While Bovaer (a feed additive given to barn-raised cattle) has been approved in some regions,²³ the feasibility of large-scale application in countries like Brazil and New Zealand, where livestock are largely free-roaming, remains unclear. Methane vaccines are years away from market readiness.

Regenerative agriculture is the solution most prominently promoted in corporate net-zero strategies. Yet it lacks a clear, science-based framework and may end up being little more than a marketing tool rather than a real climate solution.

There is a clear disconnect between the climate solutions promoted by companies and the practical realities of their operating environments. The focus on image over impact highlights the urgent need for more transparent, effective policies that drive real emissions reductions - not just empty promises. Governments must demonstrate greater ambition and political will to tackle emissions from Big Meat and Dairy.

3. Legislative and economic frameworks in which Big Meat and Dairy operate

With industry-proposed solutions falling short, a robust policy framework is needed to ensure the necessary emissions reductions from Big Meat and Dairy companies. However, as highlighted in *The New Merchants of Doubt*, this sector is different to others: it receives vast subsidies, and agricultural exceptionalism allows the industry to operate outside of existing legally binding agreements on climate, human and environmental health.²⁴ The industry has a huge amount of political influence, which has resulted in the sector largely setting its own regulatory agenda, often translating into all-carrots-and-no-sticks approaches to emissions from agriculture.

The 22 companies analysed in this report are headquartered across 11 countries globally, each with its own regulatory and economic framework. Although companies are subject to some regulations in the markets where their products are sold, this analysis focuses on where a company is headquartered.

| **Figure 3:** 22 Big Meat and Dairy company headquarters

| **Credit:** Shutterstock



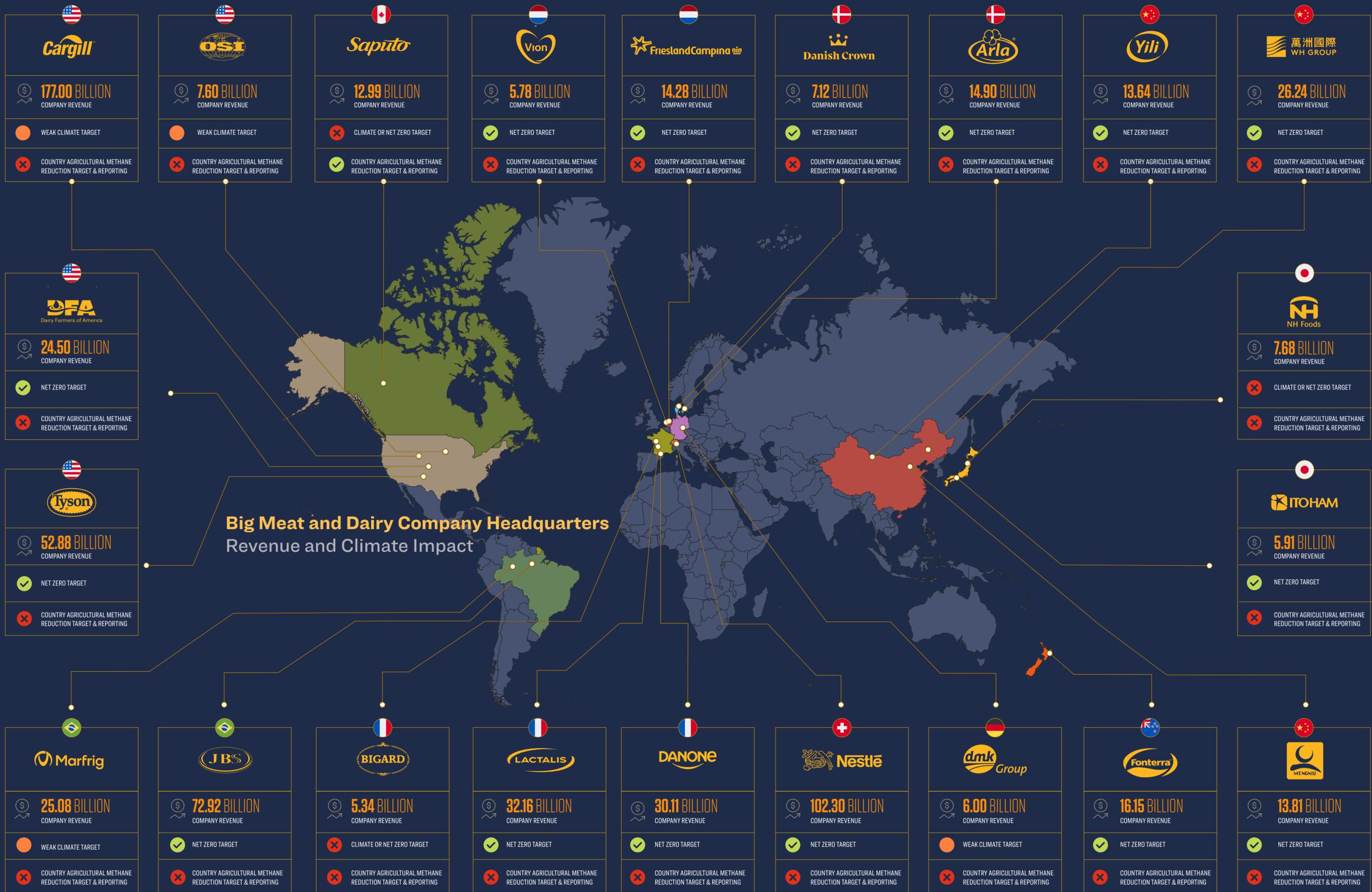


Table 1: Policy landscape for methane reduction in Big Meat and Dairy headquarter regions

Country/jurisdiction	Big Meat and Dairy companies headquartered here	Global Methane Pledge signatory	Agricultural methane reduction target and reporting	Policy framework, subsidies and support for agricultural methane reductions
 Brazil	 	 Yes	 No	<p>Some policies which reward good environmental actions but limited accountability measures and budgets:</p> <ul style="list-style-type: none"> ABC+ Plan (2022-2030): a scheme similar to the EU's Common Agricultural Policy, providing targeted funding for medium and large producers, including to promote efficient production systems to reduce emissions. Funding comes through the Plano Safra, Brazil's main agricultural policy instrument, the goal of which is to assist producers in dealing with difficulties and uncertainties.²⁵ The Zero Methane Programme: a cross-sector reward scheme aiming to establish a market for methane emissions reductions which will be launched in 2030. This programme incentivises biogas; however, agricultural emissions will be excluded from the programme's emissions trading system after successful industry lobbying. <p>Brazil has given regulatory approval for Rumin8, a methane-suppressing feed additive.²⁶ Bovaer is also authorised for sale in Brazil.²⁷</p>
 Canada		 Yes	Partly – Methane Strategy released in 2022 includes monitoring and reporting of agricultural methane but doesn't include a specific agricultural target. ²⁸	<p>The Methane Strategy includes several voluntary initiatives to incentivise methane reductions.²⁹</p> <ul style="list-style-type: none"> 'The On-Farm Climate Action Fund (OFCAF), as part of the Agricultural Climate Solutions program, providing \$670 million to support immediate on-farm action to tackle climate change, including through actions to reduce methane emissions.' 'The Agricultural Clean Technology Program (ACT) is a \$495.7 million program that aims to support the development and adoption of clean technologies in agriculture.' 'Livestock Feed Management protocol is being developed for use in Canada's Greenhouse Gas Offset Credit System, while protocols for Livestock Manure Management and Anaerobic Digestion are planned for subsequent development.' <p>In November 2023, the Canadian government launched the Agricultural Methane Reduction Challenge to reduce methane emissions produced by cattle. It was announced that up to CA\$12 million will be awarded to 'innovators advancing low-cost and scalable practices, processes, and technologies designed to reduce methane emissions produced by cattle'.³⁰</p> <p>In December 2023, the government announced plans for an offset protocol to specifically support projects that reduce enteric methane emissions in confined beef cattle feeding operations, for example through herd management, diet, feed additives or growth promoters.³¹</p>

Country/jurisdiction	Big Meat and Dairy companies headquartered here	Global Methane Pledge signatory	Agricultural methane reduction target and reporting	Policy framework, subsidies and support for agricultural methane reductions
 China	  	 No	 No	<p>The Methane Emission Control Action Plan, a five-year plan which was released in 2023, includes overarching objectives on livestock and manure management and to control enteric fermentation.³² It lists a series of actions connected to these objectives but lacks targets. The plan states³³:</p> <ul style="list-style-type: none"> The methane emissions intensity per unit of agricultural product will “steadily decline”. “Utilisation” of livestock waste will reach 80% by 2025 and 85% by 2030. <p>It calls for control of methane emissions from enteric fermentation.</p> <p>However, it lacks sufficient details or corresponding policies to establish a clear road map for achieving these objectives.</p>
 Denmark	 	 Yes, via the EU	 No	<p>Although there is no specific agricultural methane plan, there is a national target to reduce agriculture and forestry emissions by 55-65% by 2030 within a 2021 political agreement on agriculture. A new Tripartite proposal aims to achieve the emissions reduction target through:</p> <ul style="list-style-type: none"> A livestock tax of effectively 120 kroner (£14) per tonne of greenhouse gas pollution (CO₂e) from livestock in 2030, which will rise to 300 kroner per tonne in 2035. The revenues will be used to ‘support the livestock industry’s green transition for at least two years after the tax comes into effect’.³⁴ Manure regulation, driven by the EU’s Nitrate Directive Feed additives Subsidies for biogas from methane.
 European Union	       	 Yes	 No	<p>While the EU’s Green Deal included many policies to shift the region to a healthier and more sustainable food system, at least ten of these were derailed by Big Meat and Dairy.</p> <p>This included weakening the Farm to Fork strategy, removing any reference to reducing meat consumption; the Industrial Emissions Directive, which had cattle removed from it entirely; and the EU’s Methane Strategy, which does not include any mandatory actions for the sector.</p> <p>Additionally, the agri-industry successfully lobbied for the removal of methane from the National Emissions Ceiling Directive (NEC Directive), a key tool for national emission reduction commitments for Member States for air pollutants.</p> <p>Although an ambitious target was proposed in Europe’s 2040 climate plan to achieve a net reduction of greenhouse gases by 90%, 30% reduction target for non-CO₂ emissions in agriculture, present in earlier drafts, was ultimately removed from the final plan.</p>

Country/jurisdiction	Big Meat and Dairy companies headquartered here	Global Methane Pledge signatory	Agricultural methane reduction target and reporting	Policy framework, subsidies and support for agricultural methane reductions
 France	  	 Yes, via the EU	 No	<p>National Low-Carbon Strategy (SNBC) from 2015:</p> <ul style="list-style-type: none"> Aims to halve France's agricultural sector's emissions by 2050 from 1990 levels. This includes the reduction of 'non-energy emissions' from the agricultural sector by 17% by 2030 and by 38% by 2050 compared to 2020 levels. For methane emissions, this will be done through 'improving the management of livestock manure, optimising herd management, and limiting enteric fermentation'.³⁵ It sets a guideline target for 40% of usable excrement to be used for biomethane. <p>Promotion of biogas/biomethane from agricultural waste through the Energy Methanisation Autonomy Nitrogen Plan (Le plan Énergie Methanisation Autonomie Azote) and the Plan for Competitiveness and Adaptation of Agriculture (Plan pour la compétitivité et l'adaptation des exploitations agricoles) with two supporting incentive schemes:</p> <ul style="list-style-type: none"> A feed-in-premium for biogas to electricity and heat A feed-in tariff for biomethane into the gas grid. France's biogas industry is also heavily subsidised by the European Commission: in July 2024, the European Commission announced it had approved €1.5bn to support 'sustainable' biomethane production in France.³⁶
 Germany		 Yes, via the EU	 No	<p>Methane mitigation policy in agriculture presentation in 2024 stated³⁷:</p> <ul style="list-style-type: none"> A focus on a reduction in livestock numbers, ruminants in particular €1 billion towards converting livestock to 'higher animal standards' with the stated goal 'to have less numbers of animals (and less emissions) under better conditions' Reduced consumption of animal products. However, these remain intentions not binding policies. <p>Germany's national climate and energy plan submitted to the EU in 2024 makes only vague references to these supposed priority areas, with no details as to how it will achieve such goals.³⁸ It additionally cites methane mitigation techno-fixes such as feed additives and biomethane production.</p>

Country/jurisdiction	Big Meat and Dairy companies headquartered here	Global Methane Pledge signatory	Agricultural methane reduction target and reporting	Policy framework, subsidies and support for agricultural methane reductions
 Japan	 	 Yes	 No	<p>Japan's Ministry of Forestry, Agriculture and Fisheries introduced the MIDORI strategy for sustainable food systems in 2021, which prioritises promoting methane mitigation technologies and technical cooperation.³⁹</p> <p>The government has provided scant detail as to how it will meet its methane reduction targets, simply promoting its MIDORI strategy in its latest update to the Global Methane Pledge.⁴⁰</p>
 Netherlands	 	 Yes, via the EU	Partly – The Netherlands aims to reduce methane and nitrous oxide by 26% by 2030 ⁴¹	<p>The Netherlands' Climate Agreement states:</p> <p>'technical measures (e.g. manure processing, mixed feed and energy-producing greenhouses) will take preference over measures aimed at curbing volumes.'</p> <p>Efforts to reduce livestock numbers in relation to the ongoing nitrous oxide pollution issue, which would also reduce methane emissions, have seen massive pushback – see Changing Markets' report Truth, Lies and Culture Wars for further information.⁴²</p>
 New Zealand		 Yes	 No – there is a target to reduce methane from agriculture and waste by 10% by 2030 and 24-47% by 2050 below 2017 levels, but is not yet covered by any significant policies	<p>New Zealand's emissions trading scheme is a key tool for meeting its climate target, yet agricultural methane emissions, representing over 40% of New Zealand's total emissions, remain exempt.⁴³</p> <p>New Zealand's new government has signalled a shift in policy to focus on as-yet-unavailable gene editing technology, as well as approvals for trials and use of non-GE/GM biotechnologies, including methane inhibitors.⁴⁴</p>
 Switzerland		 Yes	 No	<p>Its 2011 Climate Strategy for Agriculture aims to reduce agricultural emissions by at least one-third by 2050 but remains vague as to how it will do this.</p> <p>The strategy is currently being revised and is set to include new long-term goals for 2050, aiming to reduce agricultural greenhouse gas emissions by 40% compared to 1990 levels and decrease the greenhouse gas footprint of food consumed by the Swiss population by two-thirds compared to 2020. However, the plan to make the reduction target mandatory by including it in the third CO2 Act was dropped.</p> <p>Through Switzerland's Agricultural Policy, the sector is heavily subsidised. Funding for efficient use of resources such as ecological set-aside areas and reduction of ammonia emissions have resulted in a small reduction in sectoral emissions. Discussions on a successor to the 2018–2021 policy were placed on hold and picked up in spring 2023, when all environmental aspects were rejected and only a watered-down version passed through parliament.⁴⁵</p>

Country/jurisdiction	Big Meat and Dairy companies headquartered here	Global Methane Pledge signatory	Agricultural methane reduction target and reporting	Policy framework, subsidies and support for agricultural methane reductions
 USA	   	 Yes	 No	<p>The US Agriculture Secretary, Tom Vilsack, has served as the head of the US Dairy Export Council, moving from agriculture secretary to dairy lobbyists and back to agriculture secretary. During this time the US government has prioritised incentives for agriculture, but little on accountability for emissions reduction.</p> <p>The landmark Inflation Reduction Act focused on voluntary measures and significant funding packages for technical solutions linked to biogas production. While the Partnership for Climate Smart Commodities programme set out support to farmers to deal with climate change with some positive focus areas, the largest companies in profits and pollution were also included in the programme: \$140 million was awarded to a biofuel and biomass energy company, and \$10 million to a low-carbon beef certifier.</p> <ol style="list-style-type: none"> 1. The current Biden plan focuses on: 2. Alternative manure management systems 3. The ‘expansion of on-farm generation and use of renewable energy systems’ 4. The ‘development of a climate smart agricultural commodities partnership initiative’ 5. Increased investments in agricultural methane quantification. <p>All four agriculture strategies are focused on driving up manure-based biogas production.⁴⁶</p>

N.B. This table provides a brief overview of policies in these countries but is not an exhaustive review. Further research is needed to gain a more comprehensive understanding.

This assessment of national strategies to reduce methane emissions paints a bleak picture. Nearly all national strategies lack mandatory agricultural emissions reductions, cuts in livestock production, or the inclusion of agriculture in any form of greenhouse gas pricing scheme. Instead, what dominate are supply-side, technically oriented policy solutions and support - particularly for biogas from manure - that will fail to achieve the significant emissions reduction required.

All of the countries where the 22 companies are headquartered, except for China, are signed up to the Global Methane Pledge, yet none of them has specific agricultural methane reduction targets or robust plans for achieving these reductions.

The analysis highlights the ongoing issue of agricultural exceptionalism and how tackling Big Meat and Dairy’s emissions remains a blind spot in climate policy, instead relying on voluntary commitments that leave space for greenwashing, false solutions and empty promises.

Conclusion

The science is clear: to stay within 1.5°C, we need to see significant cuts in methane emissions this decade. With food systems responsible for around a third of total greenhouse gas emissions and approximately 60% of that coming from animal agriculture,⁴⁷ Big Meat and Dairy have a critical role to play.

Changing Markets' recent report *The New Merchants of Doubt* showed that Big Meat and Dairy have been deploying tactics to delay, distract and derail climate action (similar to those used by Big Oil and Tobacco) attempting to maintain business as usual. But business as usual is not viable. Food production, especially meat and dairy, is uniquely dependent on stable climate conditions. As temperatures rise, the impacts of climate change on the sector intensify. These negative effects are not a future threat: they are already being felt by farmers around the world.⁴⁸

An added barrier to effective climate action is the lack of transparent and consistent reporting of emissions by major meat and dairy companies. Many continue to downplay their environmental impact or selectively report data that obscures their true emissions footprint. Transparent and accurate emissions reporting is essential, not only to assess the scale of the problem but



also to track progress toward emissions reductions over time. Without such transparency, or an effective policy framework to ensure credible monitoring, reporting and verification, it's difficult to hold these companies accountable.

It is imperative that companies urgently support and invest in a full transition to healthier, more plant-based diets, instead of spending money on technological solutions that are neither feasible nor sufficient to reduce emissions at the scale needed.

Recommendations for companies:

- Set short- and long-term climate targets aligned with a 1.5°C temperature trajectory, which include an ambitious methane target (at a minimum, 30% reduction by 2030) and regular reporting of methane and other GHG emissions across scope 1, 2 and 3 (with independent verification). Companies should present concrete plans that include disclosing investments on how they will reduce emissions from supply chains (where >90% of their emissions originate).
- Develop climate target plans that focus on absolute emissions reductions as a priority, with limited focus on carbon insetting such as carbon sequestration from soil. Carbon offsetting should not be included as part of meeting climate targets and should be banned.
- Disclose lobbying expenditure (including political donations and fees paid to consultancies and PR firms) and leave industry associations that lobby against climate and health legislation.
- Invest in alternative protein, including plant-based and fermentation-based products, which have significant potential to reduce emissions. Companies should set clear trajectories that include reductions of livestock numbers and a shift to less and better meat and dairy as well as more plant-based products.

- Support progressive climate, environmental, and health policies, including carbon and methane pricing.

This report has shown the failings of relying on voluntary commitments from companies in the absence of any effective national-level regulation of meat and dairy's vast emissions. It is critical that governments develop and implement ambitious national methane action plans and include food system transformation in their nationally determined contributions, expected by COP30 in Brazil.

They can regulate Big Meat and Dairy and oblige companies to establish science-based emission reduction targets, aligned with the 1.5°C trajectory and including Scope 3 in their regular reporting. And they can support farmers to move to more sustainable practices like agroecology and organic farming. To do this, governments must crack down on greenwashing, including through clear guidelines on how green claims can be formulated and by enforcing penalties on greenwashing companies.

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