BRIEFING

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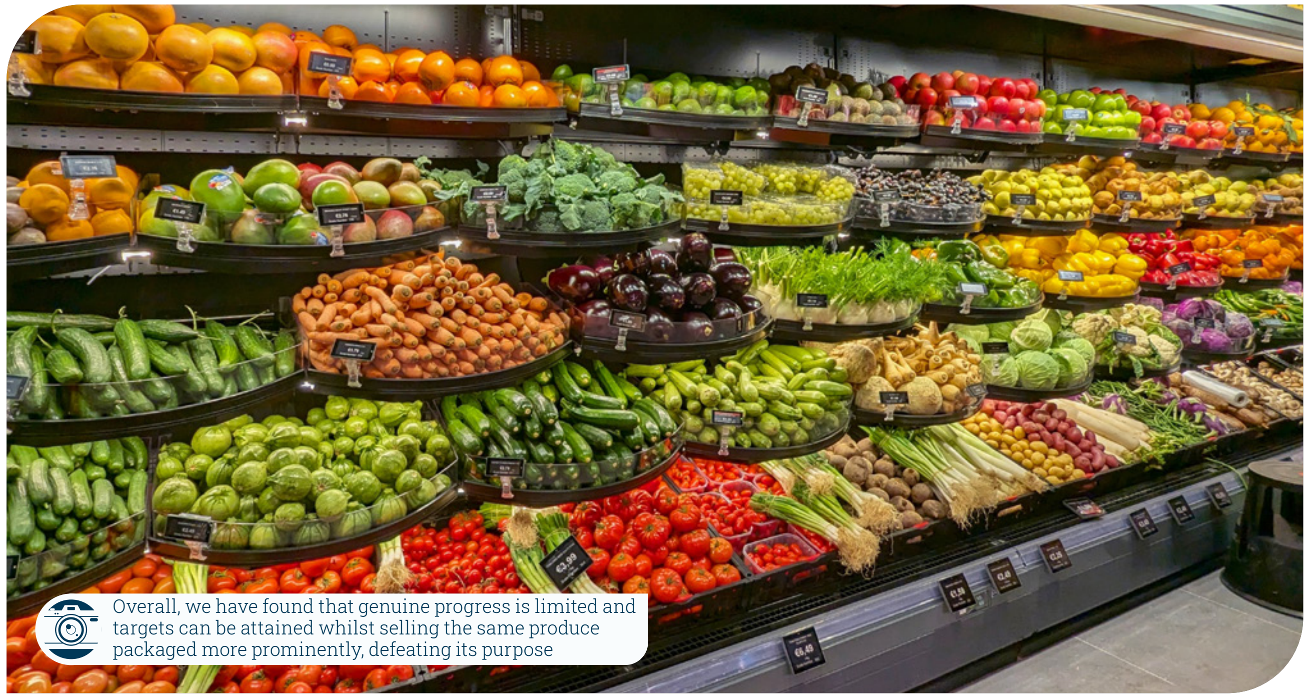
UK SUPERMARKET SALE OF LOOSE UNPACKAGED PRODUCE

Trends, barriers and opportunities



Overall, we have found that genuine progress is limited and targets can be attained whilst selling the same produce packaged more prominently, defeating its purpose

EXECUTIVE SUMMARY

UK supermarkets have made limited progress in reducing plastic packaging for fresh fruit and vegetables and transparency on loose produce sales has worsened since EIA's last comparable dataset in 2021.

While many grocery retailers have signed up to the UK Plastics Pact's voluntary commitment to sell at least 30 per cent of uncut fresh produce loose by 2025, increasing to 50 per cent by 2030, most do not publish company-level quantitative data to demonstrate whether this target has been met.

With the exception of Morrisons, which continues to state that about 30 per cent of its fresh produce is sold loose, progress under voluntary commitments cannot be verified. Most major retailers, including Tesco and Sainsbury's, do not publish figures on unpackaged produce at all.

In the absence of reliable reporting, EIA has reviewed publicly available company-level sustainability disclosures from 2020-25 and conducted in store spot checks at nine major UK supermarkets in 2026. This found that loose produce options remain limited, inconsistently displayed and routinely overshadowed by packaged formats, with many items sold both loose and packaged and the packaged option more prominent.

Taken together, **EIA's findings show that voluntary commitments have not delivered meaningful or accountable reductions in produce packaging, despite the same evidence clearly proving that selling produce solely loose is feasible.**

Stronger, binding measures are now needed to reduce produce packaging, especially plastic, and move the sector beyond incremental change.

KEY RECOMMENDATIONS

- Introduce a UK ban on packaging for whole, unprocessed fresh produce where evidence supports loose sale
- Mandate transparent, standardised retailer reporting, including annual data on loose fresh produce sales
- When mandating supermarkets to default to loose produce formats, that this is supported by appropriate weighing, pricing and reusable bag systems
- Phase out hard-to-recycle soft plastic packaging, including films and ultra light produce bags

INTRODUCTION
ADDRESSING PLASTIC POLLUTION IN FRESH PRODUCE

Plastic packaging for fresh fruit and vegetables remains one of the UK's most visible and avoidable sources of plastic pollution.

Findings from Everyday Plastic's Big Plastic Count 2026 study estimate that about 13 billion pieces of fruit and vegetable packaging are thrown away by UK households every year, highlighting the huge volume of single use packaging generated through routine food shopping. Crucially, 63 per cent of fruit and vegetable packaging is made from soft plastic, a material that is almost impossible to recycle at scale, particularly in the UK.[1] Latest industry estimates place fresh fruit and vegetable plastic packaging use at 130,000 tonnes per annum.[2]

This heavy dependence on plastic persists despite growing public concern about plastic use[3] and a series of high-profile voluntary commitments to reduce plastic by the grocery industry. Under WRAP's UK Plastics Pact, retailers and brands have committed to eliminating problematic single use plastic packaging through redesign, innovation or alternative delivery models, including reuse, by 2025.[4]

These commitments have been made alongside clear evidence that many uncut fruit and vegetables can be sold loose, without compromising food safety or quality.[5] Fresh produce wrapped unnecessarily in plastic packaging underpins the UK's broader plastics crisis as the second largest plastic consumer in the world.[6] Most UK plastic packaging waste is not meaningfully recycled but is instead incinerated or exported to countries with limited waste management capacity – driving pollution, health risks and environmental injustice.[7]

At the same time, negotiations for a new Global Plastics Treaty have temporarily stalled[8] and the UK faces mounting pressure to act domestically in the interim and in the absence of a comprehensive national strategy to meaningfully reduce plastic pollution.

With that in mind, the forthcoming UK Circular Economy Strategy in 2026 presents a critical opportunity to reduce plastic pollution at source and address long-standing constraints in the UK's recycling and waste system by adopting a suite of much-needed regulatory measures. The sale of loose produce represents a clear, immediate policy intervention point – it tackles one of the highest-impact plastic categories, aligns with public demand and offers a route to reducing not only plastic but also household food waste.

The benefits of such a measure have been acknowledged for some time. In 2023, WRAP developed a recommended objective with members (which include all major UK supermarkets except Asda and Iceland)[9] to make 30 per cent of fresh uncut produce sales loose by 2025, to increase to 50 per cent by 2050.[10] Furthermore, WRAP recently published a policy recommendation urging the Government to introduce a phased packaging ban for uncut fruit and vegetables, replicating the recently adopted measure within the EU Packaging and Packaging Waste Regulation.[11]

In this briefing we outline how, despite current commitments, historic and current data indicate that voluntary corporate action alone has not delivered increases in loose produce sales which result in meaningful plastic packaging reduction. Reviews of industry practice, including surveys conducted by EIA and Greenpeace UK between 2017-19, show that progress across UK supermarkets has remained slow and uneven.[12,13,14] Where changes have occurred, they have largely centred on packaging substitution and lightweighting rather than a shift towards primarily selling produce loose.[15]

Crucially, we are also able to demonstrate that since EIA stopped surveying supermarkets on loose produce sales in 2019, there has been little detailed data available to assess progress, beyond an average of 19 per cent loose produce sales across supermarkets in 2023.[16] The latest information EIA was able to collate nevertheless indicates that progress has remained slow and that the current framing of loose sale targets does not necessarily drive meaningful reductions in plastic packaging within this food category.

As such, strengthening regulation, including on the sale of loose produce through packaging bans, is now essential to unlock widespread adoption and deliver meaningful reductions in plastic across the grocery retail sector.

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Supermarkets are increasing the use of soft plastic packaging, including for fresh produce, despite it being hard to recycle and often mismanaged, including when exported abroad

BACKGROUND
SUPERMARKETS AND THE NON-ESSENTIAL USE OF PLASTIC FOR FRESH PRODUCE

The latest Government data shows a significant proportion of fruit and vegetables consumed in the UK is imported, with domestic fresh fruit accounting for only 15 per cent and fresh vegetables 53 per cent in 2024.[17]

Plastic packaging has been widely used within global food supply chains to facilitate distribution and extended shelf life, yet evidence suggests it does not consistently reduce fresh produce food waste and, in some cases, may contribute to it.[18] For instance, research undertaken by WRAP on five commonly purchased items – apples, bananas, broccoli, cucumbers and potatoes – showed that selling them loose and removing 'Best before' dates could prevent approximately 100,000 tonnes of food from being wasted in households, save about 10,300 tonnes of plastic packaging and avoid an estimated two tonnes of CO_2 emissions.[19]

Consumer behaviour research demonstrates that availability, clear pricing and in-store design, rather than packaging itself, are the main factors shaping purchasing decisions.[20] Shoppers consistently choose loose produce when it is clearly priced and easy to buy in the quantities they need, but uptake remains low when loose options are poorly signposted, ambiguously priced or marginalised within store layouts.[21]

Crucially, the dominant packaging format used for fresh produce – soft plastic packaging – has been shown by a 2024 EIA and Everyday Plastics investigation, *The Hard Truth About Soft Plastic*,[22] to be fundamentally incompatible with a genuine circular economy. Despite widespread retailer claims, supermarket soft plastic take back schemes do not deliver genuine recycling outcomes and have no meaningful recycling route at scale in the UK. The investigation found that the majority of collected soft plastics are incinerated or exported abroad and, if recycled, was not recycled back into equivalent food packaging.

The continued use of plastic packaging in produce departments therefore reflects corporate convenience and legacy infrastructure rather than functional necessity or environmental sustainability.

SUPERMARKET DATA (2017-19)
HISTORIC SECTOR TRENDS

Between 2017-19, EIA and Greenpeace UK conducted annual *Checking Out Plastics* surveys (published 2018,[23] 2019[24] and 2021[25]) to assess the plastic use and reduction efforts of the UK's 10 major supermarkets.

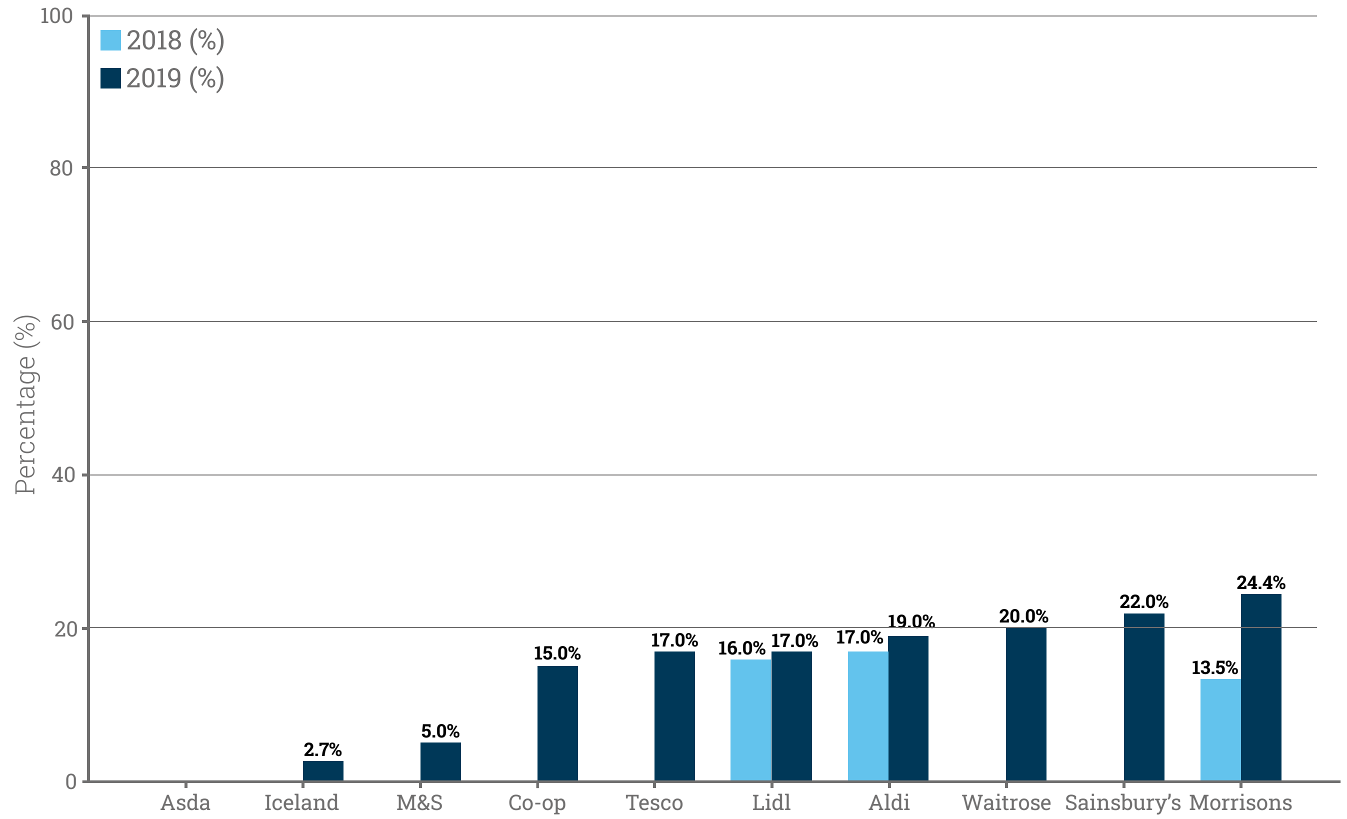
The surveys circulated standardised questionnaires to 10 grocery retailers, requesting detailed data on plastic footprints, packaging formats, reusable packaging and loose fruit and vegetable sales, in addition to reduction commitments. Retailers submitted data which was then analysed and verified directly with the companies prior to publication. This methodology provided the first consistent, sector wide dataset on supermarket plastic use and established a 2017 baseline against which progress could be measured in future years.

The surveys showed that progress to reducing plastic specifically via loose fruit and vegetables sales remained limited. In 2019, only a few retailers reported notable proportion of fruit and vegetables sold loose, Morrisons (24 per cent), Sainsbury's (22 per cent) and Waitrose (20 per cent), while others lagged far behind, with Iceland selling just 2.7 per cent of produce unpackaged.

Historic comparison data was scarce, but when available generally showed very slight progress. For instance, Aldi and Lidl increased their loose ranges by two per cent and one per cent respectively from 2018-19. Reliance on ultralight produce bags used to package loose produce also persisted, with reductions uneven and also being attributed to material substitution to compostable or paper bags.

Overall, the findings show that throughout this three-year period when supermarkets did provide data, it indicated no significant shift away from packaging to loose sales in fresh produce.

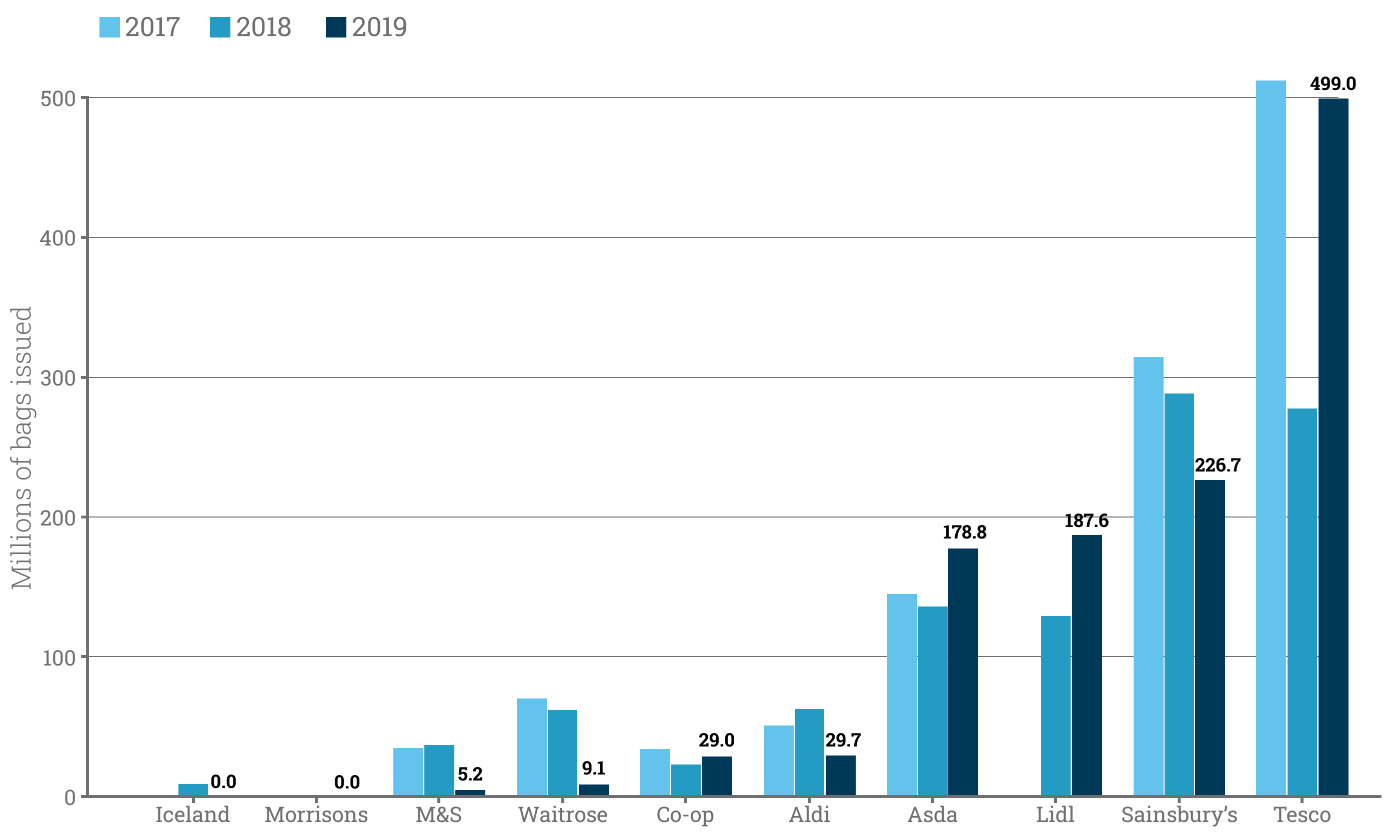
***Figure 1:** Proportion of fruit and veg sold loose by retailer (2018-19). Asda did not provide data for 2018-19; Sainsbury's, Tesco, Co op, M&S, Waitrose and Iceland did not provide data for 2018.*



KEY TAKEAWAY

SUPERMARKETS INCREASED THE PROPORTION OF LOOSE PRODUCE SOLD BETWEEN 2018 AND 2019. HOWEVER, PROGRESS REMAINED MODEST OVERALL, WITH NO RETAILER EXCEEDING 25% LOOSE SALES IN 2019.

Figure 2: Ultra light produce bag distribution trends (2017-19). Morrisons did not provide data for any year; Iceland provided data for 2018 only; Lidl did not provide data for 2017.



KEY TAKEAWAY

PROGRESS HAS NOT CONSISTENTLY REDUCED RELIANCE ON ULTRA-LIGHT PLASTIC PRODUCE BAGS OR MATERIAL SUBSTITUTIONS, HIGHLIGHTING THE NEED TO PROMOTE REUSABLE ALTERNATIVES

Data provided at the time shows the most significant growth can be attributed to Morrisons, which jumped from 13.5 per cent to 24.4 per cent between 2018-19, also being the retailer that sold the most loose fruit and vegetables in 2019. While discounters such as Aldi and Lidl saw steady increases, Sainsbury's and Waitrose emerged as top performers in 2019 at 22 per cent and 20 per cent respectively.

Ultra light plastic produce bags remained widely used, with more than 1.2 billion issued in 2019 across major retailers.[26] These are the thin tear off bags used for loose fruit and vegetables, which are single use and also very hard to recycle.

Reporting is patchy and inconsistent between retailers across the years, making it difficult to draw firm conclusions, and the limited data still shows high numbers in circulation. Some retailers had trialled reusable produce bags, but these have not significantly reduced reliance on plastics bags. For example, Asda removed more than 100 million single-use plastic fruit and veg bags in 2021 following a nine-store trial, replacing them with reusable alternatives made from recycled plastic, meaning overall dependence on plastic packaging is not necessarily reduced.[27]

It remains important to expand loose produce without increasing the use of plastic, which undermine the purpose of reducing plastic at source. Critically, Morrisons, which had the highest proportion of loose fruit and vegetables sold, did not provide data on ultra-light produce bag use. In 2021, Morrison´s stated it had instead introduced paper bag alternatives after successful trials, the first retailer to do so.[28]

Taken together, these gaps illustrate a wider transparency problem. Even where headline commitments on loose produce exist, inconsistent disclosure and the absence of standardised reporting prevent independent assessment of progress.

The following section examines how current reporting practices and voluntary commitments continue to limit accountability across the sector.

CURRENT PRACTICES
LACK OF TRANSPARENCY

WRAP REPORTING

Despite adopting a clear quantitative objective in 2021-22 for members to sell at least 30 per cent of fresh uncut produce loose by 2025, WRAP has not published data showing individual retailer progress against this target. Instead, it recognises in its latest annual report (2025) that removing plastic from fresh produce still remains a policy barrier.

Additionally, it does not provide comparable sector wide data, meaning progress cannot be independently assessed despite the existence of a headline commitment.[29]

SUPERMARKET SUSTAINABILITY REPORTS SINCE 2019

To assess how retailers have reported on loose fresh produce since the end of EIA's last comprehensive surveys, EIA reviewed publicly available supermarket sustainability reports published between 2020-25.

This review found that reporting on loose produce is limited, inconsistent and largely qualitative, with Morrisons the only retailer to repeatedly disclose an estimated proportion sold loose. Most supermarkets publish no figures or targets across multiple reporting years, instead communicating that they seem to be prioritising packaging substitution or lightweighting. A year by year overview is provided in Appendix A.

EIA REACHED OUT DIRECTLY TO EACH SUPERMARKET REQUESTING INFORMATION ON THEIR LOOSE PRODUCE SALES AND TARGETS IN THE FIRST QUARTER OF 2026

In the first quarter of 2026, EIA contacted major UK supermarkets press offices directly requesting information on loose produce sales and targets.

While most retailers responded, very few provided quantitative data on the proportion of fresh produce sold loose. Responses were largely qualitative, emphasising packaging optimisation, food waste reduction or broader plastic reduction strategies rather than transparent reporting on loose produce outcomes, reinforcing the conclusion that meaningful data on current practice remains largely unavailable (see Appendix B for verbatim responses).

VOLUNTARY COMMITMENT ACHIEVEMENT

Based on the information available in Sections 1-3, including historic survey data, sustainability reporting since 2019 and direct engagement with supermarkets in 2026, EIA assessed whether retailers could be shown to have achieved the WRAP target of selling 30 per cent of fresh produce loose or any equivalent self declared targets. This assessment found that, for the vast majority of UK supermarkets, progress against voluntary loose produce commitments cannot be verified due to the absence of published quantitative data.

With the exception of Morrisons, which repeatedly states that approximately 30 per cent of its fresh produce is sold loose, retailers do not disclose sufficient, standardised information to confirm whether targets have been met, exceeded or missed.

This lack of comparable reporting underscores the limited accountability of voluntary commitments and helps explain why progress on loose produce and plastic reduction remains slow and uneven.

In the absence of verifiable performance data, the following section examines how these limitations translate into what consumers actually encounter in store.

UK SUPERMARKET LOOSE FRESH PRODUCE
A 2026 SPOT-CHECK ON VOLUNTARY PROGRESS

Against this backdrop of limited historic progress and current available data, current sector trends reveal how the absence of binding requirements continues to shape retailer behaviour on loose produce today.

PURPOSE AND SCOPE OF THE SPOT-CHECK

To assess how far voluntary commitments on loose produce are translating into visible change on supermarket shelves, we undertook a light-touch spot check across nine major UK retailers in March 2026. This consisted of visiting one large-format London store for each supermarket – Aldi, Co op, Iceland, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose. No sufficiently large Asda branch was available within the survey radius, so Asda is not included in the findings.

This exercise does not measure sales shares or provide a representative national estimate. Instead, it offers a grounded, consumer level observation of how widely loose produce is actually available in-store after four years of Plastics Pact commitments in addition to their prominence. In effect, it answers a simple but crucial question – If a customer walked into one of these major supermarkets today, would they be able to easily find unpackaged fresh fruit and vegetable options for common basket items?

The visits assessed whether 10 common fruit and vegetable staples, (apples, carrots, potatoes, onions, peppers, broccoli, tomatoes, lemons, salad tomatoes and pears) were:

- available loose, packaged or both
- how prominent the loose options were
- the types of packaging used
- whether stores displayed any signage encouraging plastic reduction.

This spot check provides a useful insight into retailer claims and sustainability messaging in the face of lack of detailed publicly available data. Crucially, it reveals what remains highly visible to shoppers.

COMPARING IN STORE REALITY WITH RETAILER CLAIMS

The observational findings outlined in this section demonstrate a critical limitation of assessing progress through proportion based loose produce targets.

Some supermarkets have stated they have achieved or exceeded the WRAP UK Plastics Pact target of selling 30 per cent of fresh uncut produce loose, including Morrisons and Lidl. However, **the spot check demonstrates that this target can be achieved by selling the same produce both loose and packaged, with packaged formats often more prominently displayed**.

Across the supermarkets visited, the vast majority of produce observed being sold loose was also simultaneously sold in packaged form. In practice, packaged options were typically more numerous and visually dominant, acting as a significant consumption nudge for well intentioned consumers while still allowing retailers to report that loose produce sale targets have been met.

Voluntary commitments have not levelled the playing field. Since the 2019 *Checking Out* survey, the relative performance of the grocery retail sector with regards to the sale of loose produce appears broadly unchanged: Morrisons remains strongest with regards to the breadth of loose options, although even here packaged displays outnumber loose; Sainsbury's, Tesco, M&S and Waitrose sit in a mid range tier with partial loose offerings; Lidl, Aldi and Co op show limited progress; and Iceland remains the weakest with regards to loose availability.

Figure 3: *Examples of excessive plastic packaging on fresh produce from spot-check in-store London visits (March-April 2026)*

KEY TAKEAWAYS

- All retailers accessed in the spot-check, except Iceland, have signed up to the WRAP-led UK Plastic Pact, which encourages the goal of 30 per cent of uncut fresh produce sold loose by 2025.[30]
- However, publicly available up-to-date information is limited and produce aisles continue to be dominated by packaged formats across most core fruit and vegetable lines. Based on our light-touch London store visit observations, solely loose options remain incredibly limited, inconsistently displayed and rarely promoted through clear signage or pricing.
- Practices across these supermarkets over recent years indicates that voluntary commitments are not delivering genuine sector-wide loose produce sales resulting in meaningful packaging reduction in this food category.
- Without stronger requirements, loose produce will remain peripheral.

1 Aldi: Various tomato varieties sold, all packaged in plastic

2 Co-op: Various potato varieties sold, only one type sold loose

3 Iceland: None of the 10 core items sold loose, even bananas (every other store sold a loose variety of bananas)

4 Lidl: Greater availability of packaged compared to loose lemons

5 Marks & Spencer: Various potato varieties sold, only one type sold loose

6 Morrisons: Greater availability of packaged compared to loose red onions

7 Sainsbury's: Various tomato varieties sold, only one type sold loose

8 Tesco: Various crates of broccoli sold packaged in plastic, only one crate sold loose

9 Waitrose: Various tomato varieties sold, all packaged in plastic

Crucially, **this spot-check also demonstrates that supermarkets have already enabled sourcing and sale of loose produce despite their statements of the need for plastic packaging**. Excluding Iceland, every food category assessed was sold loose in at least two supermarkets. On average, each produce line was sold loose in 5.2 supermarkets out of nine. While there may be obstacles to reach economies of scale, they have proven it is already possible. These patterns are illustrated in Appendix C (comparative in store availability overview) and Appendix D (item level availability and presentation across the 10 core produce items).

CURRENT UK POLICY LANDSCAPE FRAGMENTED AND INADEQUATE

Against this backdrop of slow and uneven voluntary progress, the UK plastic policy environment plays a decisive role in shaping how supermarkets approach loose produce, yet current regulation remains fragmented and limited in scope.

With no binding requirements on produce packaging reduction and elimination, retailers remain reliant on voluntary frameworks and market led initiatives, resulting in slow and inconsistent progress.

POLICY AREA	SUMMARY	IMPLICATIONS FOR LOOSE PRODUCE / PLASTIC REDUCTION
Lack of binding plastic packaging reduction or loose produce sale requirements	No UK legislation requires loose sale of uncut fruit and vegetables; existing single use plastic bans exclude produce packaging.[31]	Retailers face no statutory pressure to move away from pre packed formats
Extended Producer Responsibility (EPR)	From 2025, producers pay full net cost of packaging waste; a 2026 fee modulation is expected to penalise unrecyclable and hard-to-recycle materials such as soft plastics.	Whether soft plastic packaging modulated fee is adequately priced to reflect its severely limited recyclability remains to be seen – if soft plastic becomes increasingly costly, loose produce or reusable formats becoming more financially attractive is then also dependent on pricing of other packaging materials since only recyclability – and not reuse – is considered within this current scheme.
Plastic Packaging Tax (PPT)	Tax on plastic packaging containing less than 30 per cent recycled content, with rates increasing annually.	The Plastic Packaging Tax incentivises the use of recycled plastic rather than reducing plastic packaging. From April 2027, the UK will allow chemically recycled plastic to count towards the tax's 30% recycled content threshold through a mass balance approach. This is a problematic technology and accounting method, that will help entrench plastic packaging use – especially soft plastic packaging.
Simpler Recycling and mandatory film collections (2026-27)	From 31 March 2026, councils in England must collect a core set of materials, with plastic film and bags added from 31 March 2027.	Expanded plastic film collection risks reinforcing reliance on soft plastic packaging, especially if modulated fees are not aptly priced and missing achievement of recycling target obligations not effectively penalised.[32]

Together, EPR, the PPT and the Simpler Recycling scheme signal a shifting regulatory landscape which will increasingly shape how supermarkets approach produce packaging.

But without binding requirements specifically targeting the sale of loose fresh fruit and vegetables, retailers are likely to continue favouring packaging substitution and combined packaged/loose sales over expanding sole loose ranges at scale.

In the absence of stronger intervention, progress will remain patchy and cautious, falling short of the UK's wider plastic reduction ambitions and needs.

EU REGULATIONS SETTING BENCHMARKS AND DRIVING CHANGES

With UK progress constrained by fragmented regulatory incentives, case studies provide valuable evidence of how binding measures and coordinated supply chain changes can accelerate the transition away from plastic heavy produce, the adoption of the EU´s Packaging and Packing Waste Regulation (PPWR) being the most apt case study to date.

The PPWR, which entered into force early 2025 and begins applying in 2026, introduces binding EU wide measures to reduce unnecessary packaging and prevent its waste. This includes direct restrictions on certain single use plastic packaging for unprocessed fresh fruit and vegetables.

Key elements relevant to loose produce[33]

- **Specific single-use plastic market restrictions from January 2030:** Annex V prohibits placing on the market certain single use plastic packaging formats, including packaging for unprocessed fresh fruit and vegetables under 1.5kg, subject to exemptions
- **Actionable waste prevention measures:** The PPWR significantly strengthens the long-standing principle of prevention (i.e. reduction) being at the top of the waste hierarchy, with direct packaging reduction rules, market restrictions and reuse obligations
- **Space for stronger national action:** EU countries may introduce additional measures to accelerate the removal of packaging (e.g., expanding bans, setting retailer obligations), acknowledging Member State desire to create even more rapid shifts toward loose and packaging free sales.

Notably, the PPWR directly restricts plastic packaging on unprocessed fresh produce, reinforcing the principle that such packaging is often unnecessary and should be removed at source rather than substituted.

While the UK is no longer bound by the PPWR, it will in any case impact UK supply chains and grocery retailers, given their interdependence in addition to the Brussels effect on business standardisation. By way of example:

- EU Member States, which will be required to undertake these changes across their supply-chains, are the largest source of UK imported food[34]
- while the EU is significantly more self-sufficient with regard to fresh vegetable and fruit consumption, both the UK and EU share non-EU sourcing countries which will be required to follow PPWR requirements on point-of-export (Morocco, Türkiye, Egypt, South Africa, Costa Rica, Kenya, etc)
- Main recipients of UK produce exporters are EU Member States. UK growers will need to comply with these requirements if they wish to continue to export to the EU.

Without produce packaging bans, the UK may still see some improvement with regard to the sale of loose produce as a consequence of EU Regulation.

However, this could leave UK policymakers, grocery retailers, farmers and growers reacting to standards set elsewhere, rather than helping to define the next generation of sustainable packaging systems.

In 2024, EIA along with Everyday Plastic, unveiled how Sainsburys and Tesco supermarket soft plastic recycling claims at soft plastic supermarket take-back points were misleading consumers, with trackers proving the majority were incinerated, exported and downcycled

RECOMMENDATIONS

The following recommendations are designed to support the transition towards unpackaged fruit and vegetables and create the relevant incentives to drive retailer action.

REGULATORY ACTION FOR UK GOVERNMENT

- Introduce a UK ban on packaging – including plastic packaging – for whole, unprocessed fresh produce by 2030, with exemptions only where robust, unbiased scientific evidence shows safety requirements
- Concurrently place limitations on the use of ultra-light produce bags, incentivising reuse options through the implementation of targets in addition to including reuse in pEPR.
- Fast track eco modulated pEPR fees, ensuring soft plastic packaging not only incurs the highest charges but that they are sufficiently priced to deter use.[35]
- Phase out hard-to-recycle soft plastic packaging, including films and ultra light produce bags

GROCERY RETAILER RESPONSIBILITIES

- Facilitate consumers to default to loose produce where feasible through layout and prominence, in addition to providing sufficient weighing, labelling and reusable produce loose bag infrastructure.
- Ensure transparent reporting on plastic use and food waste, in addition to enabling harmonised data collection to access progress.
- Ensure loose produce is clearly displayed, priced and promoted in-store.

The sale of solely loose fresh produce is possible, it just requires the correct regulatory drivers to enable this to happen

CONCLUSION

The evidence presented in this briefing demonstrates that voluntary action has not delivered the scale or pace of change needed to reduce non-essential plastic packaging on fresh produce.

Persistent transparency gaps, alongside in-store observations from 2026, show that loose options remain secondary to packaged formats across major UK supermarkets, with plastic packaging continuing to dominate produce aisles despite long-standing commitments to reduce it.

Much of this packaging consists of soft plastic film, a material with no meaningful recycling pathway at scale in the UK and which is predominantly incinerated or exported, often with significant environmental and social impacts. This entrenched reliance on unrecyclable formats reinforces the need to prioritise plastic reduction at source rather than continued downstream waste management.

At the same time, the findings show that selling produce loose is already feasible. Every core produce category assessed during the spot-check was sold loose in at least two supermarkets, indicating that technical and logistical barriers are not insurmountable. The question is therefore no longer whether produce can be sold loose, but how policy and market incentives can be aligned to make this standard practice.

With the European Union moving ahead with binding restrictions on plastic packaging for unprocessed fresh produce and the UK preparing its Circular Economy Strategy, there is now a timely opportunity for decisive action.

Without stronger intervention, progress is likely to remain fragmented and slow. With it, the UK can reduce plastic pollution at source and ensure that unnecessary packaging on fresh produce becomes the exception rather than the norm.

APPENDICES

APPENDIX A: Supermarket sustainability reporting (2020-25)

Table 1: References to loose fresh produce in supermarket sustainability reports (2020–2025)

SUPERMARKET	2020	2021	2022	2023	2024	2025
Tesco	(2020-21) No mention of loose fresh produce % or targets.[36]	–	–	–	(2024- 25) No mention of loose fresh produce % or targets.[37]	–
Sainsbury's	(2020-21) Qualitative reference to reusable produce bags and plastic bag reduction.[38]	–	(2022-23) No mention of loose fresh produce % or targets.[39]	(2023-24) No mention of loose fresh produce % or targets.[40]	(2024-25) No mention of loose fresh produce % or targets.[41]	–
Asda	Qualitative reference to increasing loose produce lines.[42]	–	No mention of loose fresh produce % or targets.[43]	No mention of loose fresh produce % or targets.[44]	Discussion of failed unwrapped broccoli trial; no loose sales %.[45]	–
Aldi	–	–	Sustainability report unavailable / link broken.[46]	Sustainability report unavailable / link broken.[47]	Qualitative reference to loose produce trials; no % or targets.[48]	–
Morrisons	(2020-21) Qualitative reference to expanding loose ranges and store coverage.[49]	–	(2022-23). Reports selling ~30 per cent of fresh produce loose (by weight) and claims market-leading loose produce.[50]	(2023-24) Claims up to 76 varieties sold loose; no new % disclosed.[51]	–	–
Lidl	–	(2020-21) Qualitative statement on maximising loose lines; no % or targets.[52]	–	(2023-24) No mention of loose fresh produce % or targets.[53]	–	–
Co-op	No mention of loose fresh produce % or targets.[54]	No mention of loose fresh produce % or targets.[55]	No mention of loose fresh produce % or targets.[56]	Minor packaging reference only (removal of liners from loose potatoes).[57]	No mention of loose fresh produce % or targets.[58]	No mention of loose fresh produce % or targets.[59]
Waitrose	(2020-21) No mention of loose produce % or targets.[60]	(2021-22) No mention of loose produce % or targets.[61]	(2022-23) No mention of loose produce % or targets.[62]	(2023-24) No mention of loose produce % or targets.[63]	(2024-25) No mention of loose produce % or targets.[64]	–
Iceland	–	–	–	–	(2024-25) No mention of loose produce % or targets.[65]	–
M&S	No mention of loose produce % or targets.[66]	No mention of loose produce % or targets.[67]	No mention of loose produce % or targets.[68]	No mention of loose produce % or targets.[69]	No mention of loose produce % or targets.[70]	No mention of loose produce % or targets.[71]

APPENDIX B: Verbatim supermarket responses (Q1 2026)

Table 2: Verbatim responses from supermarkets on loose produce sales and targets (Q1 2026)

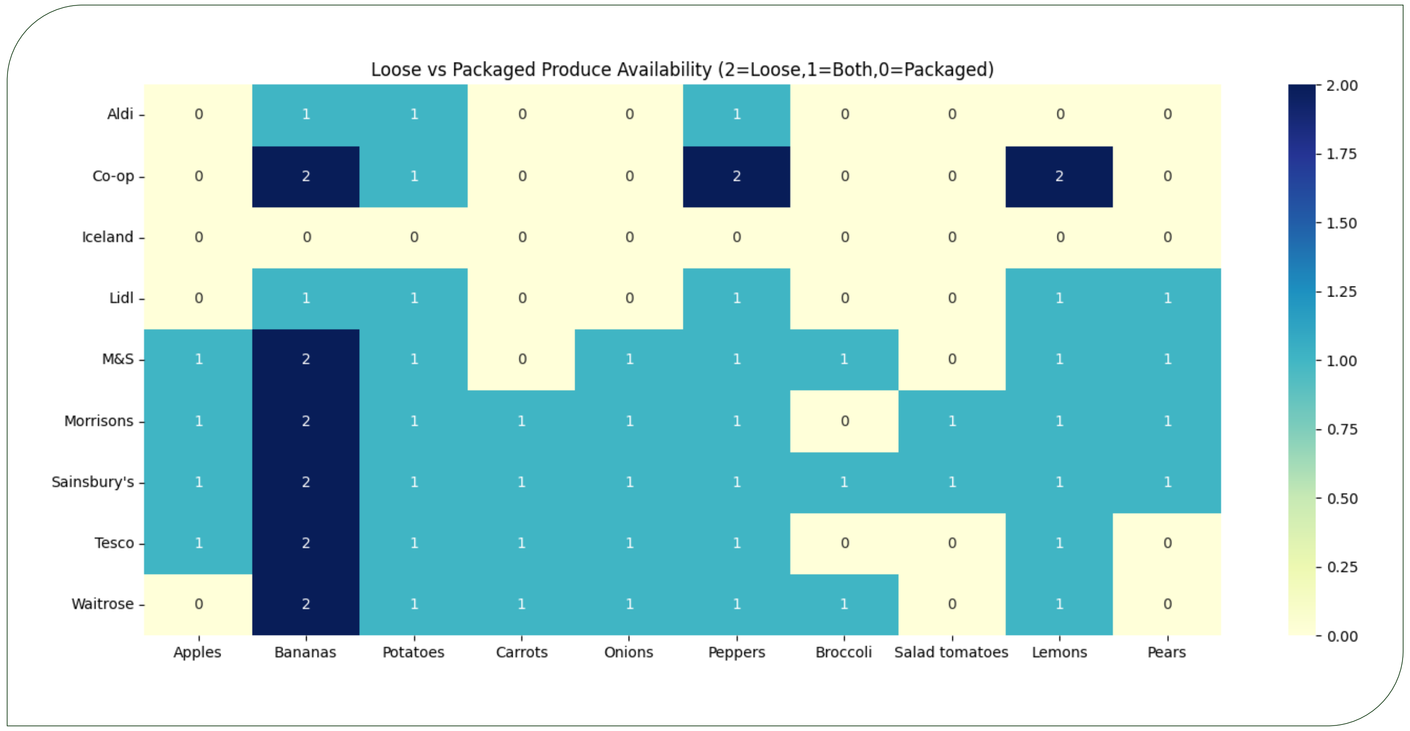
SUPERMARKET	ANSWER (COPIED VERBATIM)
Tesco	A Tesco spokesperson said: "We're fully committed to cutting unnecessary plastic and playing our part in protecting the planet. We offer loose fruit and vegetables in all our stores and through our home delivery service, and to date we've removed more than 2.5 billion pieces of plastic from our Own Brand products in the UK – including over 10 million plastic punnets from fresh tomatoes. "Our focus remains on eliminating unnecessary plastic, reducing the overall volume of packaging on supermarket shelves, increasing reuse, and helping to build a more effective recycling system. We'll continue working closely with our partners and suppliers to drive long term change." **On background** • Packaging is necessary for some fruit and veg products to help transport them in good condition, maintain freshness and prevent them being thrown away at home, but we are working hard to simplify the materials used with packaging. • We want legislation to be designed in the right way to create platforms for recycling to take place at scale, working to make the recycling industry able to work effectively and efficiently.
Sainsbury's	No response after several emails and calls between February to March 2026.
Asda	We don't have a specific target for loose produce, but we continue to work towards our overall goal of reducing packaging by 20 per cent by 2030. While loose produce can contribute to this, we don't currently track the proportion of loose fruit and veg sold. To add, since the last report in 2021, we have delivered significant plastic reductions across the category by removing unnecessary components and optimising all packaging. Punnet and bag weights are now at the lightest levels technically possible. For example, in 2024 we reduced plastic in our 300g tomato punnets by 1g, saving 16 tonnes of plastic annually. Packaging still plays an important role in helping us to preserve freshness and reduce waste across our fresh produce. Trials such as unwrapped broccoli have showed that removing packaging can increase spoilage, with waste rising to over 25 per cent compared with around one per cent for the wrapped version – so we're aware that there is a fine balance between reducing packaging and ensuring the quality of loose produce continues to be protected (and food waste avoided).
Aldi	No response after several emails and calls between February to March 2026.
Morrisons	We are the market leading supermarket for selling loose produce – we have already achieved 30 per cent of our produce being sold without packaging and we are continuing to look at ways to increase that number even further. As part of this work we are constantly working with our suppliers to find better alternatives to plastic – while at the same time acknowledging the role it plays in reducing food waste. We are also mindful of the environmental issues, like carbon impacts, of other formats. The balance between plastic packaging, food waste and environmental impacts of producing packaging is a balance we constantly review.
Lidl	We have been committed to WRAP's pathway to selling more uncut fruit and veg loose and successfully achieved their target to sell 30 per cent of all uncut fresh produce sales (units/kgs) loose by the end of 2025. Over the last year we have worked to increase our loose offering including products such as spring onions and avocados. Lidl GB report the volumes of uncut fresh produce sales annually as part of our commitment to the UK Plastics Pact. In FY2025, we sold an average of 33 per cent loose using the agreed WRAP methodology. We are a founding member of the new UK packaging pact and will work with WRAP to develop new ambitious loose targets. Through the WRAP 'Unpacking the Opportunity' industry working group, we proposed solutions to government to increase the proportion of loose fruit and vegetables.

APPENDIX B (cont'd): Verbatim supermarket responses (Q1 2026)

SUPERMARKET	ANSWER (COPIED VERBATIM)
Co-op	At Co-op, we have an important role to play in how we use resources. By reducing waste, choosing materials wisely and working more efficiently, we can do our part in creating a future that's better for our colleagues, communities and the planet. Plastic packaging is used to help protect fresh produce through the supply chain and deliver it in the best possible condition to customers. It also helps customers to reduce their food waste. Removing plastic packaging altogether on fruit and veg is difficult in small convenience stores as it performs the function that is enabled by trained greengrocers in larger stores, allowing us to rotate stock to prevent food waste and providing barrier functions that keep produce fresher for longer. However, we remain committed to reducing its environmental impact by continually improving and innovating our materials while ensuring we meet current and emerging regulations in a cost-effective way. For example, we are founding members of the new WRAP Packaging Pact and loose fresh produce will be part of the focus of the group as part of our collective industry action. We are committed to optimising packaging which means removing it where it is deemed unnecessary subject to shelf-life or quality. For the period weeks 1-8 2026 (our current range) - loose as a percentage of total sales was 25 per cent We are pleased to have a loose offering on produce lines including apples, aubergine, avocado, bananas, broccoli, cabbage, carrots, grapefruit, pineapple, garlic, leeks, lemons, limes, mango, melons, onions, oranges, pears, peppers, potatoes, squash and sweet potatoes.
Waitrose	No response after several emails and calls between February to March 2026.
Iceland	Iceland does not currently have a published target specifically relating to increasing the percentage of loose fruit and vegetables sold in stores. Instead, the company's focus has been on a broader commitment to reducing plastic packaging across its own label products. Iceland originally pledged in 2018 to eliminate plastic packaging from all its own label products by the end of 2023. However, due to challenges exacerbated by industry pressures and the pandemic, the business has acknowledged that this target will require a longer timeline to achieve. Additionally, trials centred on offering more loose produce have often resulted in reduced sales or increased food waste, leading Iceland to shift its strategy towards exploring alternative plastic free packaging solutions rather than expanding loose produce ranges. Iceland does not publish an official percentage for how much fresh produce is sold loose across its UK stores. Current evidence shows that loose fruit and vegetable offerings have only been trialled in selected stores rather than implemented as a standard nationwide practice. For example, Iceland previously trialled a loose produce aisle in a Liverpool store; however, the trial was discontinued following a 30 per cent drop in sales. Further reporting confirms that loose produce has been introduced only as part of limited plastic free pilot initiatives rather than as part of a permanent range across all stores.
M&S	We have a programme of continuous improvement in place to review, optimise and innovate our packaging to ensure that we use as little as possible while maintaining the quality and freshness of our produce and reducing food waste. We currently offer 67 lines of loose produce – some seasonal, some all-year round. Our offering varies by store size and season. We have been working with WRAP on their pathway to selling more loose fruit and veg over the last few years. We have moved lines to loose where it is possible while balancing our ambition to reduce food waste and offer the best quality available. We also have a growing range of lines which are sold with reduced plastic (such as UK strawberries and mushrooms) or in cardboard (such as two-pack avocados), which is helping us to reduce our use of plastic on fruit and veg while protecting quality.

APPENDIX C: Comparative in store availability of loose and packaged fresh produce (London spot check, March 2026)

***Figure 4:** Heatmap of comparative in store availability of loose and packaged fresh produce (London spot check, March 2026)*



Appendix D: Availability and presentation of 10 core fresh produce items (London spot check, March 2026)

***Table 3:** Availability and presentation of 10 core fresh produce items by supermarket (London spot check, March 2026)*

SUPERMARKET	AVAILABILITY OF PROPORTION OF LOOSE FRESH PRODUCE	AVAILABILITY OF PRODUCE ONLY SOLD LOOSE	PROMINENCE OF LOOSE OPTIONS	TYPES OF PACKAGING USED	SUMMARY OF IN STORE PERFORMANCE
Morrisons	Nine of 18 produce lines loose (50%)	One = banana (5.6%)	Loose options widely present across core staples, but packaged formats generally more numerous; mixed prominence depending on item	Soft plastic bags, plastic netting, plastic punnets, thin plastic film	Widest breadth of loose availability across assessed items; however, loose options frequently sit alongside more dominant packaged ranges, limiting loose-first purchasing cues.
Sainsbury's	10 of 19 sold loose (53%)	One = banana (5.3%)	Loose options consistently available but typically less prominent than packaged equivalents; packaged displays often larger and more numerous	Thin plastic bags, plastic netting, plastic punnets, trays	High availability of loose options across categories, but loose is rarely the default; packaged formats remain the primary visual cue in-store.

APPENDIX D (cont'd): Availability and presentation of 10 core fresh produce items (London spot check, March 2026)

SUPERMARKET	AVAILABILITY OF PROPORTION OF LOOSE FRESH PRODUCE	AVAILABILITY OF PRODUCE ONLY SOLD LOOSE	PROMINENCE OF LOOSE OPTIONS	TYPES OF PACKAGING USED	SUMMARY OF IN STORE PERFORMANCE
Sainsbury's	10 of 19 sold loose (53%)	One = banana (5.3%)	Loose options consistently available but typically less prominent than packaged equivalents; packaged displays often larger and more numerous	Thin plastic bags, plastic netting, plastic punnets, trays	High availability of loose options across categories, but loose is rarely the default; packaged formats remain the primary visual cue in-store.
Tesco	Seven of 16 sold loose (44%)	One = banana (6.3%)	Loose standard peppers highly prominent; most other loose items marginal compared to packaged formats	Soft plastic bags, plastic netting, hard and soft plastic trays	Moderate loose availability with strong variation by product; selective prominence for loose items rather than a consistent loose-first approach.
Marks & Spencer	Eight of 17 sold loose (47%)	One = banana (5.9%)	Loose options present but commonly overshadowed by premium packaged and organic lines	Thin plastic film, soft plastic punnets, cardboard trays with plastic	Mixed approach: loose offered for several items but packaged formats dominate shelf space and visual hierarchy.
Waitrose	Seven of 16 sold loose (44%)	One = banana (6.3%)	Loose options available but generally less prominent than packaged; packaged ranges frequently larger and better positioned	Thin plastic bags, plastic netting, punnets, trays	Loose provision exists across several staples, but packaged formats remain the default choice presented to shoppers.
Lidl	Five of 15 sold loose (33%)	0	Loose items limited and typically low visibility; packaged options clearly prioritised	Soft plastic bags, plastic netting, plastic film	Limited loose availability concentrated on a small number of items; packaging-heavy presentation overall.
Aldi	Three of 13 sold loose (23%)	0	Loose options minimal and visually marginal; packaged formats dominate produce aisles	Soft plastic bags, plastic netting, plastic trays	Very restricted loose offer, relying primarily on packaged produce even for items commonly sold loose elsewhere.
Co-op	Four of 11 sold loose (36%)	Three = banana, peppers, lemons (27.3%)	Loose options visible for a small subset of items; overall loose range constrained by store format	Thin plastic bags, plastic netting, soft plastic punnets	Limited loose offer focused on a few lines; most core items remain packaged, reflecting convenience store constraints.
Iceland	0	0	No loose options observed	Thin plastic bags, netted plastic, plastic film	No loose availability for any assessed core items; findings consistent with discontinued loose trials and reliance on packaged formats.

APPENDIX E: Examples of excessive plastic packaging on fresh produce from spot-check in-store London visits (March-April 2026)

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APPENDIX E (cont'd): Examples of excessive plastic packaging on fresh produce from spot-check in-store London visits (March-April 2026)

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