

ethical consumer



This little
piggy
doesn't
have to go
to market

Your guide to veggie bangers
& burgers for Meat Free May



Go Meat Free in May



Foreword by Fran Graham of Friends of the Earth.

Every day, we make lots of little decisions about what we are going to eat. All these little decisions add up to a big impact, especially here in the UK. With our current habit of chowing down on meat 2-3 times a day, we're damaging our health and our environment.

Our excessive taste for meat is driving climate change – global livestock production is responsible for 14.5% of total global greenhouse gas emissions. (See page 5). The impacts of climate change, from extreme weather events, to migrating pests and sea level rise, are going to make it a lot harder for us to feed everyone in the future.

As well as contributing to climate change, the environmental impact of meat is extraordinarily large. Factory farmed animals in the UK and Europe are often fed on high protein feeds like soya. Demand for space to grow this cash feed crop is resulting in alarming rates of deforestation in places like Paraguay. Meat is also incredibly water intensive – agriculture consumes 70% of the global fresh water supply, a third of this is on livestock production. The water footprint of meat is staggeringly large when compared to fruit and veg. For instance, it

takes 15,455 litres of water to produce 1kg of beef, against just 255 litres for 1kg of potatoes.

Factory farming (also called intensive farming) squeezes large numbers of animals into close quarters. Caged egg laying hens in the UK live in spaces only slightly larger than an A4 piece of paper. Factory farmed animals are often treated with high dosages of antibiotics to stop the spread of disease in the crowded conditions. This is contributing to antibiotic resistance, hurting our ability to fight previously treatable human diseases. The World Health Organisation warns that we are heading for a “post-antibiotic era – in which common infections and minor injuries can kill”.

But Friends of the Earth recognises that not all meat production is the same. Factory farming, with its huge environmental footprint, dependence on oil-based fertilisers, chemicals and imported feeds, is not compatible with a low-carbon future. But if we can reduce the demand for meat and dairy, we can change how we farm; graze animals instead of housing them in sheds and feeding them imported crops.

It's why Friends of the Earth are asking everyone to join us eating less, and better

quality, meat, less junk and more veggies.

We want everyone to see how easy and tasty meat-free meals can be, and to help people to discover delicious new dishes. It's the reason we challenge people have a Meat Free May – ditching meat and fish for a month gives participants the nudge they need to give new ingredients a chance. For the unconvinced, meat alternatives are a great way to start experimenting with meat-free meals. They make adapting well known, familiar recipes easy, and have smaller environmental impacts than meat.

Outside of May, we're asking people to take the Let's Eat Better Pledge; to eat less, and better, meat, fish and dairy, eat less junk and processed food, eat more plants, especially beans and pulses, and to waste less food. It also helps people to come together to demand the Government and food industry act to make it easy and affordable for everyone to Eat Better. We all deserve better – for our health, for our environment, and for our taste buds. - will you join us and demand food that doesn't cost the earth?

To help you go Meat Free in May, use this guide to veggie and vegan sausages and burgers to make ethical meat-free choices.



Vegging out with a burger

Josie Wexler looks at the ethics of veggie burgers and sausages.

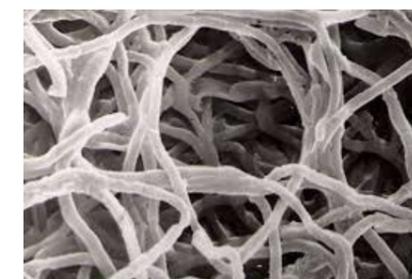
In this guide, we've covered ready-made vegetarian burgers and sausages that contain mycoprotein (definition below), soya, or other beans, and nuts. These are foods that might be considered alternatives to meat in that they are a source of protein. We haven't covered the ones that are just vegetables in breadcrumbs, or dry packet mixes like Sosmix, although the companies in this guide may also make these and other meat-free products.

The ingredients

Quorn is the leading brand in the meat alternatives market in Britain. It is made of mycoprotein, which means protein from fungi (in this case based on a type

of soil mould called *Fusarium*), grown in fermentation vats. Although the name 'Quorn' is trademarked, the patent on the mycoprotein itself expired a few years ago, so other companies can now make it under a different name if they wish. So far no one has wanted to.

As vegans will no doubt be aware, not all Quorn is vegan because egg white is used to bind the mycoprotein together.



All Quorn foods contain mycoprotein which is derived from the *Fusarium venenatum* fungus and is grown by fermentation using a process similar to the production of beer or yoghurt.

However, two vegan versions are now on sale in the UK, which use potato starch instead – frozen hot & spicy burgers and chicken style pieces.

In terms of ingredients across all brands, however, soya is still the number one choice. It is appealing because, unlike most other beans, it provides complete protein, containing all eight essential amino acids that we need. It has been eaten in Asia for thousands of years and was introduced to the rest of the world in the eighteenth and nineteenth centuries, but it didn't catch on as a human food outside of Asia until much later.

Strangely, none of the main types of meat alternatives were created for animal welfare reasons. Soya sausages were invented in Germany during the first world war as a way of dealing with meat shortages. Quorn was developed in the 1960s as part of a research drive to find new proteins, due to concerns about feeding the growing world population.



The veggie sausages of the future

Some people are experimenting with making meat alternatives out of lupin beans, sometimes called “the soya bean of the north”.

They are also very high in protein, and they can grow in cooler climates than soya, which makes them better suited to Europe. Their aficionados claim that they are nutritionally and environmentally superior. At the moment lupin burgers are extremely niche and not included on the table, but can be bought online in places like boutique-vegan.com.



Lupin beans.

Which sausages & burgers are vegan?

- All sausages & burgers from Veggies, Dragonfly, Taifun, VegiDeli and Fry's.
- Goodlife Spicy Veg Beanburgers, Goodlife Nut Burgers.
- Wicken Fen Carrot & Coriander sausages, Tomato & Garlic sausages, Mushroom & Tarragon sausages.
- Quorn hot and spicy burgers
- All Linda McCartney sausages, plus plain burgers and 1/4 lb burgers

Veggie and vegan companies

Vegan companies: Veggies, Dragonfly, VBites (VegiDeli), Life Foods (Taifun) and Fry's.

Vegetarian companies: Goodlife and Weeks Foods (Wicken Fen).

The other companies: Hain Celestial (Linda McCartney's), Nestle (Tivall), Dr A. Stoffel Holding AG (Granovita), Monde Nissin (Quorn and Cauldron), and all the supermarkets, sell meat in addition to vegetarian and/or vegan options.

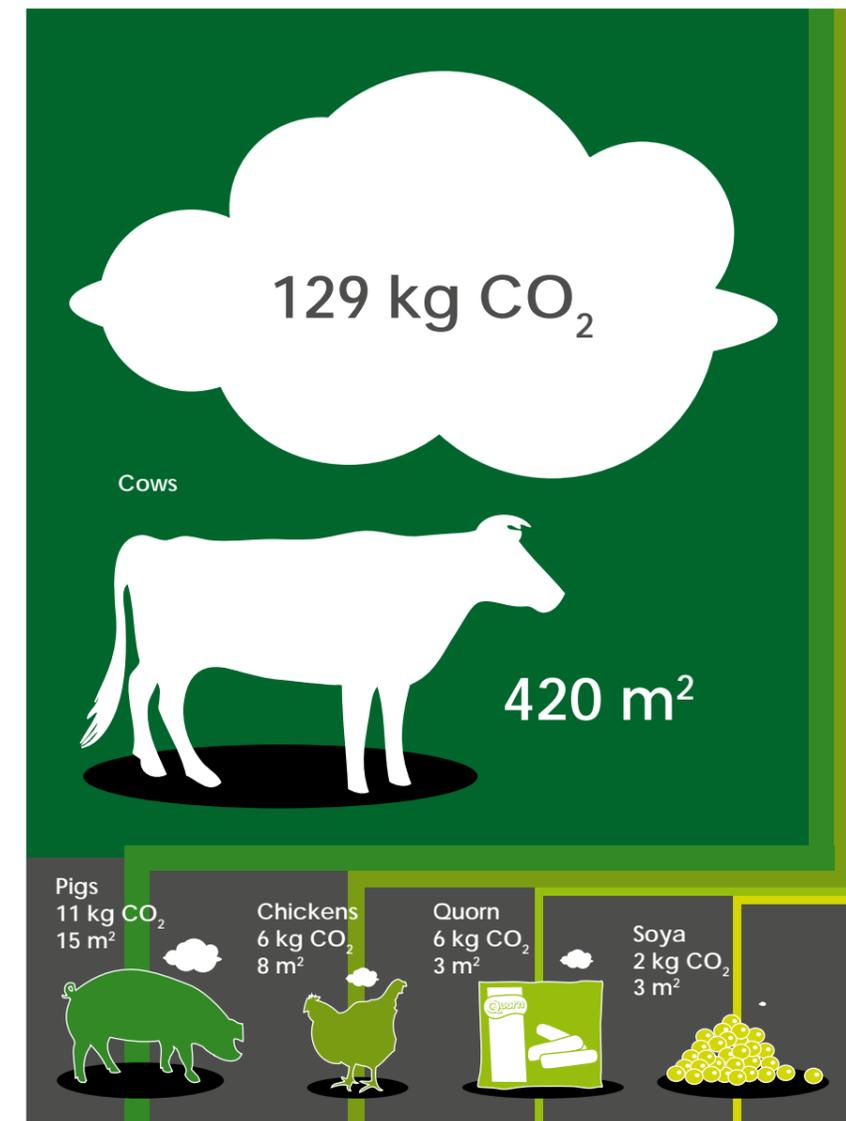
We only included the supermarkets that do their own brand veggie burgers or sausages. (Co-op does not).

Veggie vs meat the environmental impacts



A field of soya plants and a field of beef cattle. As a rule of thumb, the production of meat from plants is inherently inefficient.

Greenhouse gas and land use impacts (upper limits)



■ = Land use – m² years per kg of product
 ☁ = Greenhouse gas emissions – kg CO₂ equivalent per kg of product

Figures show the upper limits. Ranges are: **Beef** 9-129 CO₂ and 7-420 m² land; **Pork** 4-11 CO₂ and 8-15 m² land; **Chicken** 2-6 CO₂ and 5-8 m² land; **Quorn** 2-6 CO₂ and 1-3 m² land; **Soya** 1-2 CO₂ and 2-3 m² land.

The greenhouse gas emissions of food products is a big deal – agriculture accounts for about a third of world greenhouse gas emissions.¹

As a rule of thumb, the production of meat from plants is inherently inefficient. Each time you go up a level in the food chain you lose energy. For example, in the case of beef, which is substantially grass-fed, about 50g of soya goes into creating a 100g beef burger.²

Red meat is also plagued by other climate issues, as it is the source of so much methane and nitrous oxide, both far stronger greenhouse gases than carbon dioxide.

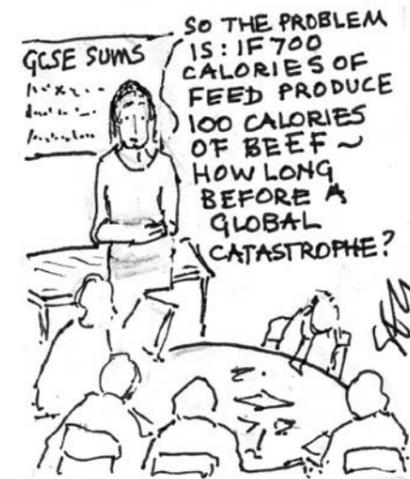
(Please note, it is only animals that eat grass or other cellulose-based food that produce significant amounts of methane in their flatulence and burps. Human flatulence is nearly all nitrogen).

However, exactly how bad you think meat is for the climate depends on many things, not only how it is produced, but how you divide up responsibility for things like deforestation.

It is hard to find figures specifically on veggie burgers, but the relative figures for meat, Quorn and soya-based meat substitutes in general are given in the graphic opposite.³

Although there are wide ranges in the figures (ranges shown under the graphic), for simplicity the graphic only shows the upper limits. The overall picture that emerges, unsurprisingly, is that veggie is generally better, and red meat is the super villain.

Out of the veggie options, soya generally seems to beat Quorn on



greenhouse gas emissions. Quorn is the winner on land use though, which is to be expected given that it is not an agricultural product but is largely made from an industrial process (fermentation).

Yet as stated above, all of these figures are apt to change enormously depending on how things are produced and, if

grown badly, soya may start to look a lot less virtuous compared to Quorn. One calculation suggested that the greenhouse gas impact of soya beans could vary from 0.1 kg CO₂eq/kg if it was produced sustainably, to 16.5 kg CO₂eq/kg, if it was produced on deforested land in the Amazon.⁴

References: 1 Natasha Gilbert, 2012, One-third of our greenhouse gas emissions come from agriculture, Nature 2 WWF, The Hidden World of Soy 3 Data compiled from Durk Nijdam Trudy Rood, Henk Westhoek, The price of protein: Review of land use and carbon footprints from life cycle assessments of animal food products and their substitutes, Food Policy 37 (2012) 760-770; and also from some of the studies it mentions 4 Érica Castanheira & Fausto Freire, 2013, Life-cycle greenhouse gas assessment of soybeans

USING THE TABLE

Ethicscore: the higher the score, the better the company across the criticism categories.

● = worst rating
○ = middle rating
empty = best rating (no criticisms).

USING THE TABLES

Positive ratings (+ve):

- Company Ethos:
 - ★ = full mark,
 - ☆ = half mark.
- Product Sustainability:
 - Maximum of five positive marks.

BRAND	Ethicscore (out of 20)	Environment				Animals			People			Politics			+ve		COMPANY GROUP			
		Environmental Reporting	Nuclear Power	Climate Change	Pollution & Toxics	Habitats & Resources	Animal Testing	Factory Farming	Animal Rights	Human Rights	Workers' Rights	Supply Chain Management	Irresponsible Marketing	Arms & Military Supply	Genetic Engineering	Boycott Call		Political Activity	Anti-Social Finance	Company Ethos
Dragonfly [V, O]	15.5									●								★	1.5	Dragonfly Group
Veggies [V]	15.5									●								★	1.5	Veggies
Taifun [V, O]	14.5	●								●								★	1.5	Life Foods GmbH
Fry's [V]	13.5		○		○				○	●								★	1	Fry Group Foods
Goodlife [V]	13.5							○		●									1	Goodlife Foods
VegiDeli [V]	13.5		○		○				○	●								★	1	VBites Foods
Goodlife	12.5							○		●										Goodlife Foods
Wicken Fen [V]	12.5							○		●			○						0.5	Weeks Foods
Wicken Fen	12							○		●			○							Weeks Foods
Granovita	9	●						●	●	●	●	●	○				○			Dr A Stoffel Holding AG
Quorn [V]	8	●	○		○			●	●	●	●	●	○						0.5	Monde Nissin
Cauldron	7.5	●	○		○			●	●	●	●	●	○							Monde Nissin
Quorn	7.5	●	○		○			●	●	●	●	●	○							Monde Nissin
Linda McCartney [V]	6	●	○	○	○			●	●	○	○	○	○			○	●		0.5	Hain Celestial
Linda McCartney	5.5	●	○	○	○			●	●	○	○	○	○			○	●			Hain Celestial
M&S	5		●	○	○	○	○	●	●	●	●	○	○			○	○			M&S Group plc
Waitrose [V]	5	○	○	○	○	○	○	○	○	○	○	○	○			○	☆		0.5	John Lewis Partnership
Aldi	4.5	○	○	○	○	○	○	○	○	○	○	○	○							Aldi
Sainsbury's [V]	4.5	○	○	○	○	○	○	○	○	○	○	○	○			○	●		1	J Sainsbury plc
Waitrose	4.5	○	○	○	○	○	○	○	○	○	○	○	○				○	☆		John Lewis Partnership
Sainsbury's	3.5	○	○	○	○	○	○	○	○	○	○	○	○			○	●			J Sainsbury plc
Tesco	2.5	○	○	○	○	○	○	○	○	○	○	○	○			○	●			Tesco plc
Lidl [V]	2	○	○	○	○	○	○	○	○	○	○	○	○			○	●		0.5	Schwarz Gruppe
Morrisons [V]	2	○	○	○	○	○	○	○	○	○	○	○	○			○	●		0.5	Wm Morrison plc
Lidl	1.5	○	○	○	○	○	○	○	○	○	○	○	○			○	●			Schwarz Gruppe
Morrisons	1.5	○	○	○	○	○	○	○	○	○	○	○	○			○	●			Wm Morrison plc
Asda [V]	1	○	○	○	○	○	○	○	○	○	○	○	○			○	●		0.5	Walmart
Tivall	1	○	○	○	○	○	○	○	○	○	○	○	○			○	●			Nestle
Asda	0.5	○	○	○	○	○	○	○	○	○	○	○	○			○	●			Walmart

[O] = organic [V] = vegan varieties See all the research behind these ratings on www.ethicalconsumer.org. Free to subscribers.

The ratings

Many of the companies on the table are small in terms of turnover. This means Ethical Consumer does not require them to have the type of well-developed environmental and supply-chain policies that we would expect of larger companies. They are also too small to do much tax avoidance, to be big political donors, or to pay their directors obscene sums of money.

- The big companies did not all fare so well, being marked down for, amongst other things:
- **Likely use of tax avoidance strategies:** Hain Celestial (Linda McCartney), Dr A Stoffel Holding (Granovita) & Nestle (Tivall)
 - **Excessive directors pay:** Hain Celestial & Nestle
 - **Political Donations:** Hain Celestial (US Democrats) & Nestle (US Democrats and Republicans)

The companies behind the brands

Veggies is an explicitly political, vegan workers coop based in Nottingham. It has been going since 1984, providing vegan catering at events and supporting campaigns for human and animal rights and environmental protection. It also sells radical books, ecological cleaning supplies, vegan multivitamins and Zapatista coffee. Its food is organic and GM free, and its soya is sourced from Europe. Its ready-made sausages are available from the Lembas wholesalers (www.lembas.co.uk) who also distribute to wholefood shops within a 90 mile radius of Sheffield.

Dragonfly Foods is a small vegan company based in Devon which makes exclusively organic, non-GM tofu products.

Taifun is owned by **Life Foods**, a German company which makes exclusively vegan, organic and non-GM tofu and tofu-based products. Its products contain no palm oil, and are made from ecologically grown European soya.

VBites foods used to be called Redwood. It makes the **Cheatin**, **VegiDeli** and **Making Waves** lines of meat alternatives. We couldn't get information on its soya sourcing and it does use some uncertified palm oil. It also makes vegan cheese alternatives and vegan desserts.

Fry's is a South African family company that produces vegan and GM-free food. It lost some marks for using uncertified palm oil, and we couldn't get information on its soya sourcing. However, it also runs the Fry's Family Foundation that promotes vegetarianism throughout the world.

Hain Celestial produces the **Linda McCartney** brand. All Linda McCartney sausages and its plain burgers and 1/4 lb burgers are vegan.

Hain Celestial is a large American company that also produces a range of other food and healthcare products.

It doesn't do very well in our ratings. It is registered in Delaware, a tax haven, and it has directors that earn over £1 million. We couldn't get information on its soya sourcing.

Hain Celestial has just agreed a \$7.5 million settlement to end an American class action lawsuit over it having allegedly falsely labelled products as organic. (Not its meat alternatives).¹

Quorn and **Cauldron**, the two main meat-free brands that you see in supermarkets, are both now owned by **Monde Nissin**, a Philippine company that largely makes packet noodles. Quorn was launched in the mid-eighties; a joint enterprise of the food company Rank Hovis McDougall and the chemical company ICI.

Probably because of the nationality, it was quite hard to get much information on Monde Nissin. It doesn't appear to have subsidiaries in tax havens, but neither could we find much by way of ethical policies – at least for the company as a whole. However, Cauldron's soya is from Canada, China and Europe, and is organic and non-GM.

Tivall is owned by **OSEM**, an Israeli company that is in turn owned by **Nestle**. It comes out very badly in our ratings. This is because Nestle has been widely criticised in a number of areas and is subject to a boycott call for its actions regarding baby milk marketing.

Nestle is also a member of many free trade lobby groups and in the 2014 election cycle it gave \$77,550 in political donations to US political candidates, with about two thirds of it going to Republicans. It also spent over \$2 million on political lobbying.²

References: 1 Newsday, 23/9/2015, Hain Celestial settles mislabelling lawsuit for nearly \$10 million 2 www.opensecrets.org



All of our best buys are vegan companies with explicit environmental agendas, and for this reason they score highly in our rating system.

Our Best Buys are **Veggies**, **Dragonfly**, **Taifun**, **VegiDeli** and **Fry's**.

Of the widely available brands, **Quorn** and **Cauldron** just beat the other main brand, **Linda McCartney** although Linda McCartney has more vegan varieties.

Soya's role in the deforestation of South America

Alongside logging and cattle ranching, soya production has a history of being linked to South American deforestation, particularly in Brazil, which is one of the biggest exporting countries.

This absolutely does not mean that vegetarians eating tofu have ever been a leading cause of deforestation in the Amazon. Most of the world's soya is fed to animals; only 6% of it is eaten directly by people.

Yet it is still sensible to be concerned about where the soya in your veggie burger comes from.

If it is grown well, soya should be an environmentalist's best friend. It produces more protein per land area than any other major crop. It grows particularly well in tropical climates, which is why so much is grown in South America, but Brazil has enough former pasture or abandoned land to double the amount of farmland without harming a single leaf on a single tree.¹ The issue is making sure that this happens.

Brazil's success story

There is good news, as Brazil has managed to vastly reduce deforestation over the past decade. The rate at which the Amazon is being cut down is now 70% lower than it was ten years ago. As a result, it has reduced its greenhouse gas emissions more than any other country on earth.²

Most analysts put this achievement down to a political shift within Brazil. A big part of the story is the moderately left wing government that has been in power since 2003. It has made some effort to tackle deforestation: expanding protected areas, shutting down illegal logging operations, and throwing those responsible in jail. Another part is that the soya and beef industries have both agreed to moratoriums on the buying of produce grown on deforested land – more on that below.³

However, there is also bad news. In spite of this success, the Amazon is still being lost at about 6000 km² a year – an area about the size of Norfolk. Furthermore, the rate of deforestation has started rising again in the last couple of years. And some of the things that have contributed to the reduction in deforestation are now under threat.



Seven-foot-tall Greenpeace chickens invade McDonald's outlets after a report revealed the chickens used in their products were fed on soya that comes from the Amazon.

The Brazilian Soy Moratorium

The Brazilian Soy Moratorium was established in 2006, after a huge global campaign by Greenpeace. Two huge industry groups agreed that none of their members would buy any soya grown on recently deforested land. And this was a massive deal as these groups – representing traders like Cargill, ADM and Bunge – control 90% of the Brazilian soya market.

The moratorium was initially a short-term agreement, but it has now been renewed eight times. Farms violating it are identified using satellite data from the Brazilian Space Agency.

The moratorium has been an incredible success, which is especially impressive given that the price of soya has been high over the period. One recent academic study found:

“Between 2001 and 2006, prior to the moratorium, soybean fields in the Brazilian Amazon expanded by 1 million hectares, contributing to record deforestation rates. By 2014, after eight years of the moratorium, almost no additional forest was cleared to grow new soy.”⁴

Inevitably, there are some problems. One problem is that the moratorium

only covers the Brazilian Amazon, and deforestation for soya has continued in other places such as Argentina, Paraguay and Brazil's Cerrado forests.

But the biggest problem with the moratorium is that it is currently set to end in May 2016. Sadly, there appears to be consensus that the deal will end but the reasons for this remain opaque to us.

Soy certification schemes

As well as the moratorium, there are two main certification schemes that are active in South American soya: The Roundtable on Responsible Soy (RTRS) and ProTerra. They both started about the same time as the moratorium. A decade on, their most glaring feature is how much less successful they have been than the moratorium.

The schemes both demand that soya meets basic environmental and labour standards. The ProTerra scheme differs in that the soya must be non-GM, and also, when you buy a bit of ProTerra certified soya, it is guaranteed to be the same bit that received the certification. The Roundtable allows some certification credits to be bought and sold separately from the soya that earned them.

© Jiri Rezac / Greenpeace

What can consumers do?

For those who want to avoid South American soya, Veggies, Cauldron and Taifun all say that their soya is not sourced from the region. Veggies' and Taifun's comes exclusively from Europe, while Cauldron's comes from Europe, China and Canada.

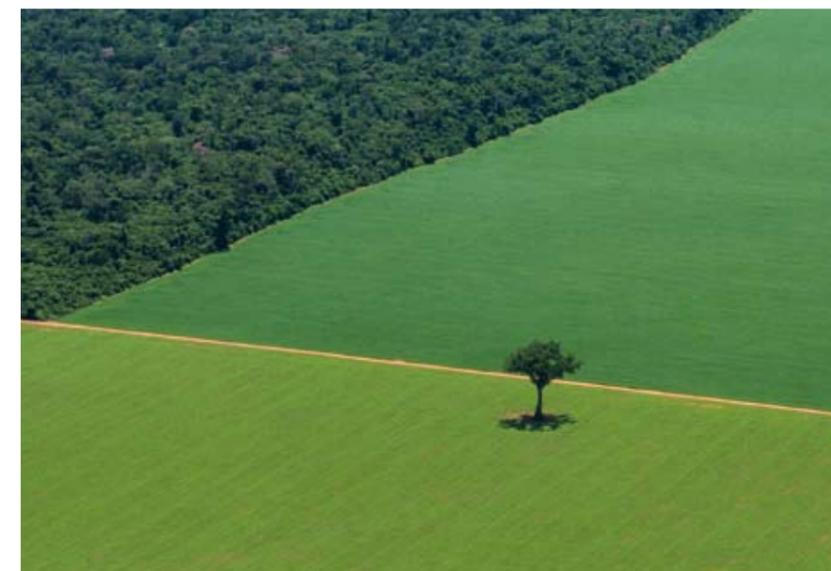
If you want to avoid soya altogether, Goodlife burgers and sausages are made from other beans, vegetables and nuts, as are Waitrose's. And Quorn is made from mycoprotein.

We couldn't get details of where the other companies source their soya.

The Soya Moratorium is supported by the European Soy Customer Group, whose members include Waitrose, M&S, Tesco, Co-op, Sainsbury's, Nestle and ASDA. They should be commended on being part of such a successful initiative.

In terms of the purchase of RTRS credits, the World Wildlife Fund describe M&S, Waitrose, Sainsbury's and Tesco as leaders.⁹ M&S has committed to buying the most out of any UK shop, although this is still only enough to cover, in its own words “the soy used in all M&S Oakham chicken products”.

There is a lack of organised campaigns in this area at the moment, probably because the problem looked sufficiently like it was solved so that everyone turned their attention onto palm oil instead. However, the Soya Moratorium has shown the power that companies really have to do things in this area, and the power that the public have to force them into it. So if it all starts to unravel in the next few years, it will be worth focusing as much pressure on them as we can.



A Brazil nut tree stands alone in a soya field planted on deforested land.

© Greenpeace / Rodrigo Baleia

So far, engagement with these schemes has been pretty limp. Only 0.5% of soya from Brazil is RTRS certified, and half the credits that have been issued have not been sold, due to a lack of buyers. A slightly larger amount is ProTerra certified, but not much.⁵ It is possible that this lack of interest may have been partly due to the success of the moratorium.

Many groups such as Friends of the Earth have criticised the Roundtable for having lax standards, pointing out, for example, that the criteria contain loose ideas like “native forest” that are easily open to abuse.⁶

What happens now?

Things have definitely improved in the last decade. But there are still major problems.

Firstly, there is something that none of these schemes address, which is soya's indirect impact – widely believed to be a factor in the remaining Amazon destruction. It works like this: cattle ranchers sell their land to soya farmers, pocket the money and move into the forest themselves. The soya comes up smelling of roses because it is not being grown on ‘recently deforested land’. It has displaced its guilt onto the cattle. While there is also a beef moratorium in Brazil, it is not yet clear whether it is working as well as the soya one.⁷

Secondly, as stated above the soya moratorium seems about to reach the end of its life, and then it is pretty unclear what will happen next.

The theory is that the Brazilian government will take over forest

protection. Over the past few years it has built a national land registry to clarify who owns what, and companies are saying that this should give it sufficient agency to enforce its own land use policies as it sees fit.

But there are several problems here, one of which is that the law is too weak. Since 1965 the Brazilian ‘Forest Code’ has officially protected Brazil's forests; stipulating protected areas and demanding that landowners conserve native forest on a certain proportion of their land, ranging from 80% in the Amazon, to 20% in other areas. While that is something, it still allows for quite a bit of deforestation. Furthermore, the law was weakened in 2012 after a big political fight, which does not bode well.

Another problem is that, even with the land registry, it remains to be seen how well the government will enforce the law.

Recent research found farmers five times more likely to violate the Forest Code than the soya moratorium.⁸



A Greenpeace protest against Cargill's illegal soya port in the Amazon rainforest and the deforestation caused by the expansion of soya.

References: 1 France-Press, 17 Sep 2013, Soybean farming blamed for increased deforestation in Brazilian Amazon 2 Howard, June 5, 2014, Brazil Leads World in Reducing Carbon Emissions by Slashing Deforestation 3 Boucher, 2014, How Brazil Has Dramatically Reduced Tropical Deforestation 4 Gibbs et al, 2015, Brazil's Soy Moratorium, Science 347, 6220 5 Meijer, 2015, A comparative analysis of the effectiveness of four supply chain initiatives to reduce deforestation, Tropical Conservation Science, Vol. 8 (2): 583 6 Friends of the Earth et al, 2011, Certified responsible? Critical assessment of the Round Table on Responsible Soy 7 Karen S. Meijer, op cit. 8 Gibbs et al, op cit. 9 WWF, 2014, Soya Report Card

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