



**Consumer
Focus**

Campaigning for a fair deal

Embargoed to 00.01 on 9 November 2009

Green to the core?

How supermarkets can help make greener shopping easier

Jeff Alder and Lucy Yates

November 2009



Acknowledgements

Consumer Focus commissioned **GfK NOP Limited** to conduct in-store, helpline and website research. This work was led by Samantha Lynch, Associate Director **GfK**.

We would like to thank the following for contributing their valuable time and expertise to informing the project's development:

| | |
|--------------------|--|
| Shivani Reddy | <i>Sustainable Development Commission</i> |
| Simon Osborne | <i>Which?</i> |
| Elen Watkin | <i>Defra</i> |
| Alison Spalding | <i>Food Standards Agency</i> |
| Kath Dalmeny | <i>Sustain</i> |
| David Barling | <i>Centre for Food Policy, City University, London</i> |
| Sally Uren | <i>Forum for the Future</i> |
| Helen Rimmer | <i>Friends of the Earth</i> |
| Anthony Kleanthous | <i>World Wildlife Fund</i> |

For more information, please contact Lucy Yates at: lucy.yates@consumerfocus.org.uk

Contents

| | |
|---|----|
| Executive summary | 4 |
| What we did | 10 |
| Score cards | 13 |
| Climate change | 22 |
| Waste: action to reduce, re-use and recycle | 27 |
| Sustainable fishing | 31 |
| Sustainable farming | 35 |
| Conclusions | 41 |
| Recommendations | 44 |

Executive summary

This is the third in a series of reports¹ in which we rate the UK's top nine supermarkets on how well they inform consumers about sustainability issues and help them make more sustainable choices. The previous two reports were published in 2006 and 2007.

This survey of the supermarkets was carried out in July 2009. We set out to see what they are doing in their stores, and saying on helplines and company websites to inform and advise consumers on four environmental indicators: climate change, sustainable farming, sustainable fishing, and waste and recycling.

It is two years since our last report and we were expecting to find evidence of big improvements from each of the supermarkets in all of the indicators. We are pleased to say that, for the majority, this has been the case. Marks and Spencer (M&S) and Sainsbury's achieved the greatest improvements and both scored the first-ever overall A grades. With 70 per cent of consumers wanting businesses to do more to help them make more informed environmental choices about the products they buy², it is good to see these supermarkets responding to what their customers want. However, other supermarkets are lagging behind in our ratings, and even regressing in Asda's case.

Nonetheless, 'A grade' scores do not mean that M&S and Sainsbury's have nothing more to do. This report looks only at how the supermarkets encourage and make it easy for consumers to make sustainable choices. It does not address many of the important behind-the-scenes sustainability issues, such as the energy efficiency of stores or carbon emissions from transport, among many others. There is still a long way to go before the supermarkets in this survey, even those scoring A grades, can be satisfied they have done all they can to improve the sustainability performance of their businesses.

The economic downturn has led many supermarkets to focus keenly on value. However, the improvements we have identified show sustainability issues are still important to both the supermarkets and consumers. Indeed, recent research by Consumer Focus shows that more than half of consumers (54 per cent) say they are buying more environmentally responsible products compared to two years ago, against just three per cent who say they are buying less³. However, the same research also showed that only 20 per cent of consumers thought businesses were doing enough to promote environmentally-friendly options to consumers.

The food we eat and its production, transportation, consumption and eventual disposal impacts on climate change. Food is the average household's number one contributor to climate change – responsible for nearly a third of our impact⁴. Supermarkets make up 73 per cent of grocery sales in the UK⁵, and make a significant contribution to climate change.

We have seen some strides in supermarkets stocking UK-sourced seasonal produce; 92 per cent of the seasonal produce surveyed in Waitrose was sourced from the UK. Sainsbury's and Morrisons were reasonably close behind, sourcing 83 per cent and 81 per cent, respectively.

¹ <http://collections.europarchive.org/tna/20080804145057/http://www.ncc.org.uk/publications/index.php>
National Consumer Council 2006 'greening supermarkets; how supermarkets can help make greener shopping easier' 2006
National Consumer Council 2007 'green grocers; how supermarkets can help make greener shopping easier' 2007

² Carbon Trust (June 2009). 'High street failing on footprinting.' Press release. Available at: <http://www.carbon-label.com/business/latestnews.htm> [Accessed 10 September 2009].

³ Consumer Focus (2009). Green expectations: consumers' understanding of green claims in advertising. London: Consumer Focus.

⁴ Tukker, A et al 2006 Environmental Impact of Products (EIPRO): analysis of the life cycle environmental impacts related to the total final consumption of the EU25. European Science and Technology Observatory. European Commission http://ec.europa.eu/environment/ipp/pdf/eipro_report.pdf

⁵ IGD 2008, UK Grocery Retailing 2008 <http://www.igd.com/index.asp?id=1&fid=1&sid=7&tid=26&folid=0&cid=94>

However, we estimate that all supermarkets could have been stocking 90 per cent and higher since our survey was carried out in July, a time of abundance for UK fruit and vegetables. It is disappointing not more of our major supermarkets are taking advantage of this potential. Asda performed particularly badly here, with only 59 per cent of the produce surveyed sourced from the UK – a 10 per cent drop since 2007.

Despite the two new entrants to our survey, Aldi and Lidl, each scoring Ds overall, they did both score a perfect 100 per cent for having freezers with doors that close in their stores, thereby saving energy. They also scored reasonably well on stocking UK-sourced produce. Aldi also came top for stocking the highest proportion of the products we surveyed with Forest Stewardship Council (FSC) and recycled packaging (96 per cent), hence helping to protect the world's forests. This shows that, despite these supermarkets having an overwhelming focus on price, there are still areas where sustainability and value can overlap. All shoppers, with support from the supermarkets, can have access to more sustainable products, whatever their budget.

Our 2009 survey also showed that, this year, the gap between the top and bottom performing retailers is widening, with overall scores ranging from A to D. Some have shown great improvements and, indeed, are competing on sustainability issues while others risk being left behind. Supermarkets must not shift their focus from these issues during a recession – sustainability has both immediate and long-term relevance. They must develop long-term sustainability strategies that rely on innovation and big goals to make change happen.

Overall ratings

2009 overall scorings:



2007 overall scorings were:



2006 overall scorings were:



Consumer focus indicators

Each supermarket was scored on how well it measured against the following indicators:

1

Climate change: reducing greenhouse gas emissions

- The ratio of open freezers to freezers with doors which close
 - Seasonal food: the availability, promotion and signposting of nine in-season, UK-sourced fruits and vegetables
 - Seasonality information: availability of information on seasonal produce from helpline and website
-

2

Waste: action to reduce, re-use and recycle

- Own-brand toilet paper, kitchen towel and cereal packaging with recycled content or content certified by the FSC
 - Presence of, range of and information on recycling facilities inside the store
 - Incentives to reduce and re-use carrier bags and availability of the bags-for-life scheme
-

3

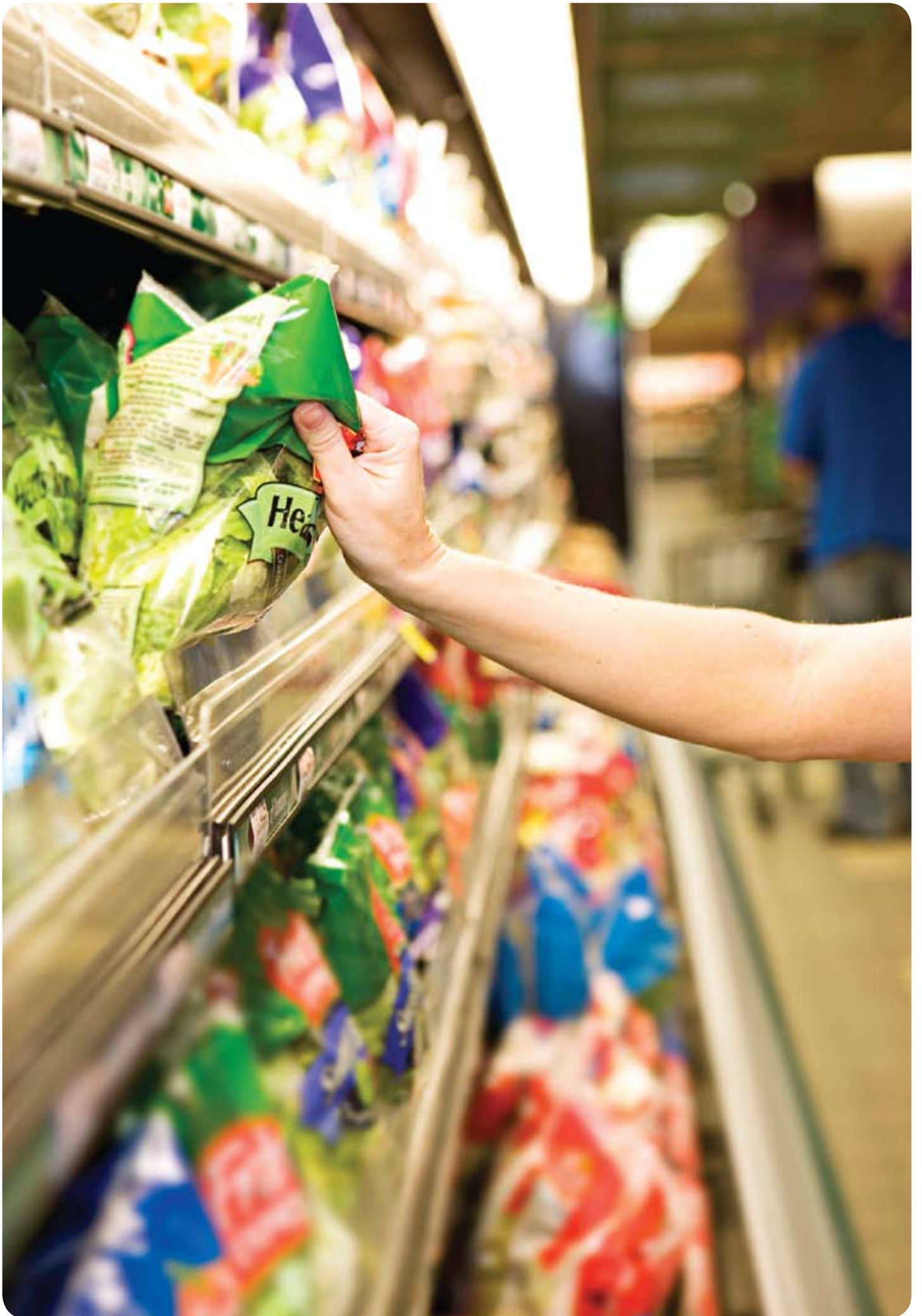
Sustainable fish: supporting sustainable sourcing

- Availability of sustainably-sourced pre-packed fresh fish, frozen fish fingers and tinned tuna
 - Information available on sustainable sourcing through store signage, a helpline and website
-

4

Sustainable farming

- The provision of organic alternatives for ten fresh products for which there are concerns about higher pesticide use and residue levels
 - Proportion of six own-brand products fairly traded
 - Proportion of higher welfare standards for meat and eggs
 - Signposting and promotion of fairly traded and higher welfare products
-



Recommendations

We believe supermarkets can do more to help consumers engage with the sustainability agenda and help them make more sustainable choices. We call on supermarkets to adopt the following recommendations:

Climate change

- Continue to make efficiency savings by putting doors on all freezer units and using less harmful gases in freezer units during regular replacement programmes.
- Explore and progress consumer acceptance to doors on chillers.
- Engage with suppliers to ensure a secure supply of UK-seasonal produce.
- Promote seasonal produce in stores and online by, for example, developing tie-ins with recipe cards and magazines.
- Adopt a promotions policy which offers incentives for the purchase of environmentally friendly foods, especially unprocessed foods and those that are mainly plant-based.

Waste and recycling

- Provide consumers with incentives to reduce and re-use carrier bags and introduce the bags-for-life schemes.
- Make maximum use of recycled and sustainably sourced certified packaging materials such as FSC certified materials, and label them accordingly to inform consumers.
- Tell consumers about the need to reduce, re-use and recycle. Include the new standardised on-pack recycling label on all products.
- Provide a wide range of well signposted recycling facilities inside the store, as well as outside, where possible.

Sustainable fishing

- Set specific and stretching targets for sustainable sourcing and help suppliers meet strict sustainable fisheries criteria.
- Extend ranges of Marine Stewardship Council (MSC) certified products.
- Tell consumers about sustainable sourcing policies.
- Only sell fish included on the MSC fish-to-eat list, and take non-sustainable fish off the shelves. Help consumers choose and appreciate a wider variety of sustainable fish species through product innovation and promotional activity.

Sustainable farming

- Set targets for increasing the range of organic and other low-pesticide food options.
- Set targets for increasing the range of fairly traded and higher welfare products.

Consumer engagement

- Communicate sustainability issues to consumers effectively, not just in stores but also on helplines and websites. For example, use website links to relevant issues for online grocery shoppers.
- Communicate effectively to consumers about the 'smart' use of products so they are using products in ways which minimise energy and water use in the home, and reduce waste.

Additional issues

We identified other areas where we think consumers will have concerns in the future but are not covered in this report. Supermarkets can help consumers to make more sustainable choices in these areas.

Transport

The way consumers travel to and from the supermarket is a major component of the overall environmental impact of food. It has been estimated that the carbon dioxide emissions generated by people driving their food shopping home could equal those generated by the commercial transporting of food within the UK⁶. Supermarkets are tackling their own transport emissions but they are not, as yet, doing much to encourage consumers to use different transport options.

- Supermarkets should encourage alternatives to car use, such as buses, bicycles and shopping online.

Food waste and promotional strategies

In tough economic times, consumers are looking to benefit from money-saving opportunities in supermarkets. This is particularly important for those on lower incomes. However, an estimated 6.7 million tonnes of household food waste is disposed of each year in the UK: 45 per cent of salad is bought and thrown away; 26.3 per cent of fruit; and 19.1 per cent of vegetables⁷.

- Retailers can encourage consumers to buy UK seasonal fruit and vegetables in such a way that does not contribute to food waste, for example, by promoting produce with money-off rather than multi-buy offers.

.....

⁶ Estimates suggest that such car journeys generate 20 to 50 per cent of CO2 emissions from food transportation within the UK. See: T. Garnett (2003). Wise moves: exploring the relationship between food, transport and CO2. <http://www.bettertransport.org.uk/system/files/Wise+Moves+Report.pdf> Transport 2000 Trust.

⁷ WRAP (2008). Food waste report V2: the food we waste. Banbury: WRAP.

What we did

Our survey is a snapshot, designed to reflect the experience of ordinary consumers when they go food shopping. The findings reflect what we found in stores, on telephone helplines and on websites.

Assessments were carried out on nine of the key supermarkets in the UK: Tesco, Asda, Sainsbury's, Morrisons, Waitrose, Lidl, The co-op, M&S and Aldi. Somerfield is not included in the survey because of The co-op's buy out of the chain. The discount retailers Aldi and Lidl are included for the first time because of their recent growth in market share.

Mystery shoppers completed assessments at each of the nine selected stores in the Manchester area. We chose larger stores that could reasonably be expected to provide a wide range of products and promotions, and to reflect the shopping experience of consumers in Manchester⁸.

Store assessments

Seven mystery shoppers⁹ participated in the study and received full and comprehensive training prior to completing assessments. Proofing checks were completed on all data prior to analysis.

Two mystery callers made one call to the supermarkets' customer service helplines. All calls were made during July 2009.

Website assessments were made on the information available on the supermarkets' online grocery websites and general corporate websites in July and August 2009. The assessment concentrated on the availability and ease of accessing information about our four indicators. We did not include the effectiveness of online purchasing in this survey.

We also wrote to the supermarkets asking them for details of their progress on behind-the-scenes issues that we could not cover in our report and our recommendations are available on our website www.consumerfocus.org.uk. The ratings, however, are based entirely on what was found in stores, on helplines and on websites to ensure that our conclusions continue to reflect the everyday shopping experience of consumers.

There are some modifications to the indicators, compared with the 2007 report:

- In the climate change indicator, we removed energy-saving light bulbs. This is because all retailers will phase out traditional incandescent light bulbs and only low-energy fluorescent bulbs will be available by 2011.
- In the climate change indicator, we added the ratio of open freezers to freezers with doors which close, and we updated the list of seasonal fruit and vegetables to reflect the time of year the survey was conducted.

⁸ Based on square footage and number of tills
⁹ Selected by GfK NOP Ltd.

- In the waste indicator, we added the presence of, range of and information on recycling facilities inside the store.
- In the sustainable fish indicator, we added the information available on the source and sustainability of tinned tuna.
- In the sustainable farming indicator, we added sections on fairly traded products and animal welfare. We looked at the proportion of six own-brand fairly traded products and the proportion of higher welfare meat and eggs. We also incorporated the signposting and promotion of these products.

Although scores are comparable with 2007, these changes mean there are some differences since the last survey.

.....





Score cards

Aldi

| Subject | Comments | Score |
|----------------------------|---|-------|
| Climate change | <p>Closed-door freezer units Excellent performance: 100 per cent of freezers have doors which close.</p> <p>Seasonal UK-sourced food availability and promotion Showing potential with 67 per cent of produce surveyed sourced from the UK. Let down by lack of signposting on seasonality.</p> | C |
| Waste | <p>Reduce, re-use and recycle Showing potential. An excellent performance on recycled content with a high proportion of surveyed products (kitchen towel, toilet paper and cereal boxes) from sustainable or recycled sources. An incentive to reduce and re-use carrier bags through charging but no bags-for-life scheme and no in-store recycling facilities.</p> | C |
| Sustainable fish | <p>Availability and signposting We chose not to rate Aldi on this because we found only one own-brand product (fish fingers).</p> | N/A |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare Poor. Few organic and fairly traded products. Only 25 per cent of the meat and eggs we looked at had higher welfare standards; not the lowest in our survey but could do better.</p> | E |
| Overall comments and score | <p>Scored highly in some areas - 100 per cent closed door freezers and a high proportion of sustainable content in packaging. However, let down by lack of information for consumers in many areas and could do better in the amount of UK in-season produce.</p> | D |

Asda

| Subject | Comments | Score |
|----------------------------|--|-------|
| Climate change | <p>Closed door freezer units Showing potential with 67 per cent of freezer units with closed doors. Attention must be given to chest freezers, which were all open.</p> <p>Seasonal UK-sourced food: availability and promotion A disappointing score. Only 59 per cent of produce surveyed was sourced from the UK. This is a 10 per cent drop since 2007, a dismal result. Must do better in promoting seasonal produce to consumers, both in stores and online.</p> | C |
| Waste | <p>Reduce, re-use and recycle Showing potential. Not much progress since 2007 with only two of 45 own-brand cereal products labelled as FSC certified. However, there were some FSC-certified kitchen towel and toilet paper. The assessor found no in-store recycling facilities.</p> | C |
| Sustainable fish | <p>Availability and signposting Room for improvement. Only a small proportion of fish were certified using the MSC scheme. Could offer more sustainable fish choices and provide information for consumers through in-store signposting and via the website and helpline.</p> | D |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare Room for improvement. Disappointingly, the proportion of organic produce has dropped from 18 per cent in 2007 to 11 per cent in 2009. More could be done to inform and promote sustainable farming issues to consumers.</p> | D |
| Overall comments and score | <p>Room for improvement. A disappointing drop in the overall score since 2007, which is disappointing given the supermarket's large market share. The reduction in the percentage of seasonal produce sourced from the UK is of concern; down to 59 per cent. More could be done to provide information for consumers throughout the store on all indicators.</p> | D |

The co-op

| Subject | Comments | Score |
|----------------------------|--|----------|
| Climate change | <p>Closed door freezer units</p> <p>Room for improvement with only 50 per cent of freezers having doors. Attention must be given to chest freezers, which were all open.</p> <p>Seasonal UK-sourced food: availability and promotion</p> <p>Good provision of UK seasonal food, with 75 per cent sourced from the UK, but still room for improvement. Clear signage in the store on seasonality, including prominent posters. The information provided through the helpline and website was good.</p> | B |
| Waste | <p>Reduce, re-use and recycle</p> <p>Showing potential. Recycled content of toilet paper and kitchen towel was good but let down by cereal boxes which did not declare any form of recycled content. Carrier bag recycling was available in-store but no facilities for recycling other items.</p> | C |
| Sustainable fish | <p>Availability and signposting</p> <p>Room for Improvement. The co-op sustainable sourcing policy, which is articulated well on the website and helpline, was not effectively communicated in store. There was little availability of fish labelled as sustainably sourced or MSC certified.</p> | D |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare</p> <p>Excellent. 95 per cent of own-brand products surveyed were fairly traded - the highest proportion in the survey. Fairly traded products were well communicated to consumers. There was also a good selection of higher welfare meat and eggs. The supermarket's pesticide reduction policy of 'conventionally grown, reducing, banning and controlling pesticide use' was identified on 50 per cent of the products surveyed.</p> | A |
| Overall comments and score | <p>Room for improvement. The co-op scores highly in some areas but fell down in others such as recycled content and translating its excellent corporate fish sourcing policy in stores with products and signposting. However, this is a welcome improvement in the score since 2007.</p> | C |

Lidl

| Subject | Comments | Score |
|----------------------------|--|----------|
| Climate change | <p>Closed door freezer units Excellent performance. 100 per cent of freezers have closed doors.</p> <p>Seasonal UK-sourced food: availability and promotion Good score with 71 per cent of seasonal produce sourced from the UK, with clear in-store signposting and helpline information. Could improve this score with more focus on UK-sourcing and better website information.</p> | B |
| Waste | <p>Reduce, re-use and recycle Room for improvement. There were no recycling facilities available in the store and although there was an incentive to re-use carrier bags through charging, there was not a bags-for-life-scheme. A significant proportion of toilet paper had FSC sustainable content, but this was not the case for cereal boxes or kitchen towels.</p> | D |
| Sustainable fish | <p>Availability and signposting Showing potential. It was encouraging to see the own-brand fish fingers are from sustainable stocks but this was not indicated on the own-brand tuna.</p> | C |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare Poor. Few organic products available and none were being promoted at the time of our survey. The proportion of higher welfare meat and eggs was the lowest in our survey. Fairly traded products were also proportionally in short supply.</p> | E |
| Overall comments and score | <p>Room for improvement. Lidl's high score on climate change, both in closed door freezer units and seasonal UK-sourced food, is dragged down by a poor score for sustainable farming and waste. More could be done to increase the recycled content in packaging, and improve the information for consumers on sustainability issues.</p> | D |

M&S

| Subject | Comments | Score |
|----------------------------|---|-------|
| Climate change | <p>Closed door freezer units Excellent performance. 100 per cent of freezers have closed doors.</p> <p>Seasonal UK-sourced food: availability and promotion Good improvement since 2007. 74 per cent of produce sourced from the UK, although this could be further improved. Helpful website and help line information as well as good in-store signposting kept the score high.</p> | A |
| Waste | <p>Reduce, re-use and recycle Showing potential. A mixed result with only some of the cereal boxes declared as being made from recycled materials. But good to see both kitchen towels and toilet paper made from sustainable FSC sources.</p> | C |
| Sustainable fish | <p>Availability and signposting Excellent. All own brand pre-packed fresh fish and tuna marked with an M&S sustainably sourced message. Signposting, helpline and website information, and in-store brochures draw customers' attention to sustainability issues.</p> | A |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare Excellent. Although only a small proportion of organic produce was available in store, there was a good range of fairly traded own-brand products (86 per cent) and higher welfare meat and eggs (100 per cent).</p> | A |
| Overall comments and score | <p>Excellent results for stocking seasonal produce and sustainable fish backed up with strong scores for the availability of fairly traded products. This is supported by good information helping customers make more sustainable choices.</p> | A |

Morrisons

| Subject | Comments | Score |
|----------------------------|---|----------|
| Climate change | <p>Closed door freezer units Room for improvement in this area with 48 per cent of freezer units having closed doors. Attention must be given to chest freezers, which were all open.</p> <p>Seasonal UK-sourced food: availability and promotion Good score with one of the highest proportions of fresh fruit and vegetables sourced from the UK. However, there is still room for improvement.</p> | B |
| Waste | <p>Reduce, re-use and recycle Good. A significant proportion of own-brand kitchen towels and toilet paper were made from sustainable sources. A replacement bags-for-life scheme and recycling facilities for carrier bags contributes to a creditable score.</p> | B |
| Sustainable fish | <p>Availability and signposting Room for improvement. Despite a corporate policy of 100 per cent own-brand fresh fish from sustainable sources, our assessors did not find any in-store signs about this policy. The majority of the pre-packed fresh fish and fish fingers were not marked as sustainably sourced.</p> | D |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare Room for improvement. A good score for the proportion of meats and eggs of a higher welfare standard is pulled down by few products being fairly traded, and strawberries and celery the only organic fruit and vegetables. However, the website has excellent information on animal welfare.</p> | D |
| Overall comments and score | <p>Showing potential. For the first time in our studies, Morrisons have achieved a C rating, improving from a D. This is good progress and we hope to see it continue in the future. Good score for seasonal produce, with 81 per cent sourced from the UK. They could improve by making their corporate policy on sustainable fish sourcing evident in the store as well as increasing their in-store signposting of all sustainability issues.</p> | C |

Sainsbury's

| Subject | Comments | Score |
|----------------------------|--|----------|
| Climate change | <p>Closed door freezer units Good. 63 per cent of freezer units with closed doors. Attention must be given to chest freezers, which were all open.</p> <p>Seasonal UK-sourced food: availability and promotion Good. An increase in percentage of seasonal foods sold, up from 60 per cent in the 2007 survey to 83 per cent, the second highest percentage in this research. Prominent signage in the store and good website information. Improvements could come from more focus on UK sourcing, which would raise the percentage score to higher than 90.</p> | B |
| Waste | <p>Reduce, re-use and recycle Excellent. A high proportion of product packaging made from sustainable materials or from a sustainable source (FSC). The best provision of all stores surveyed of recycling facilities inside the store.</p> | A |
| Sustainable fish | <p>Availability and signposting Excellent. A high proportion of products were labelled with the MSC certification (fish fingers, for example) and sustainable sourcing messages (well managed fisheries). Good signing outlined the sustainable fisheries policy in the store. The helpline response was good and the website informative.</p> | A |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare Slight increase in the number of organic lines sold, up from 12 per cent in 2007 to 14 per cent. A good proportion of fairly traded and higher welfare products, and these were well communicated to consumers.</p> | A |
| Overall comments and score | <p>Excellent engagement with consumers through signage in the store, helplines and website information. Excellent sustainable farming and fish policies reflected in the store with a high proportion of sustainable products available. A straight 'A' score could be achieved by putting doors on all freezers and increasing further UK sourcing.</p> | A |

Tesco

| Subject | Comments | Score |
|----------------------------|--|----------|
| Climate change | <p>Closed door freezer units Good. 76 per cent of freezers have doors. Attention must be given to chest freezers, which were all open.</p> <p>Seasonal UK-sourced food: availability and promotion Good. The percentage of UK seasonal foods has increased since 2007 from 65 per cent to 76 per cent, but this could be better. Seasonal produce was well signposted and recipe card leaflets offered useful integration of messages with recipes using seasonal produce.</p> | B |
| Waste | <p>Reduce, re-use and recycle Showing potential. Kitchen towels and toilet paper are now made from FSC materials, which is an improvement on 2007, but cereal packets still did not have any indication of recycled content or sustainably-sourced packaging. Carrier bag recycling facilities were available in the store but not for any of the other products surveyed.</p> | C |
| Sustainable fish | <p>Availability and signposting Showing potential. A significant proportion of fish products showed a sustainable message (67 per cent) and some good information was given by the helpline. The website could have had more information available.</p> | C |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare Showing potential. The number of organic lines has increased from 20 per cent to 23 per cent, the largest proportion in our survey, showing a continued upward trend from the first survey in 2006. Although there were a reasonable number of fairly traded and higher welfare products, these were not well signposted in store.</p> | C |
| Overall comments and score | <p>Showing potential. The top score for the number of organic lines with the highest proportion being promoted in our survey. Seasonal foods were also promoted more than at any other supermarket. Could do more to signpost fairly traded and higher welfare products in stores.</p> | C |

Waitrose

| Subject | Comments | Score |
|----------------------------|--|----------|
| Climate change | <p>Closed door freezer units</p> <p>Room for improvement with only 50 per cent of freezers having doors. Attention must be given to chest freezers, which were all open.</p> <p>Seasonal UK-sourced food: availability and promotion</p> <p>Excellent. A big increase in the amount of UK-sourced seasonal produce, up from 62 per cent in the last survey to 92 per cent, the highest in this survey. There was clear and prominent signposting, helping to draw attention to seasonal produce.</p> | B |
| Waste | <p>Reduce, re-use and recycle</p> <p>Showing potential. It is a mixed story with declared sustainable packaging content in around a third of the products we surveyed, predominantly toilet paper made from FSC materials. Of the products surveyed, only carrier bags could be recycled in-store but this was well signposted. Staff were helpful and a bags-for life-scheme is in place.</p> | C |
| Sustainable fish | <p>Availability and signposting</p> <p>Excellent. All the products surveyed were either MSC labelled or had on-pack messages about sustainable sourcing. Leaflets provide a good introduction to Waitrose's sustainable fish policy. There were signs on the shelves for the pre-packaged fish section, and at the fish counter, announcing the policy in the store. Helpline and website information was also good.</p> | A |
| Sustainable farming | <p>Availability and promotion of organics, fairly traded products and animal welfare</p> <p>Good. 41 per cent of chicken was either free range or organic, and the rest had some form of welfare message on the packaging. There was a rather modest proportion of organic produce (14 per cent), and this was roughly the same as in the last survey. A low proportion of the organic produce was being promoted (three per cent) compared to non-organic produce (32 per cent).</p> | B |
| Overall comments and score | <p>Good. Third place this year. Excellent fish policies and signage throughout the store on all the issues we are considering. Could do more by using sustainable packaging materials, and increasing the range and promotion of fairly traded and organic products.</p> | B |

Climate change

What is the issue?

The Climate Change Act commits the UK to reducing its greenhouse gas emissions by at least 80 per cent by 2050, and reductions in CO₂ emissions of at least 26 per cent by 2020 (against a 1990 baseline).

We examined two areas, in-store refrigeration and the availability of UK-seasonal foods, to see how well supermarkets are helping consumers to reduce their greenhouse gas emissions.

Refrigeration

Refrigeration, lighting, heating, ventilation and air conditioning are among supermarkets' most energy intense in-store activities¹⁰. The Environmental Investigation Agency (EIA) estimates that about one-quarter of the carbon footprint of supermarkets comes from refrigerant gases, such as hydrochlorofluorocarbons (HCFCs) and chlorofluorocarbons (CFCs), which are powerful greenhouse gases and are being phased out across the world¹¹.

Seasonal food

Stocking and promoting seasonal food can help consumers engage with the climate change agenda. The least greenhouse gas intensive fruits and vegetables are seasonal field-grown UK produce cultivated without heating or protection¹².

What we did

We wanted to investigate how well supermarkets are reducing their carbon footprint in relation to refrigeration, and stocking and promoting seasonal UK food. We selected these two issues because they are examples that the customer can see and engage with. We looked to see if in-store freezers have doors that can close. They help keep the cold air in and, hence, improve energy efficiency. Researchers estimated the total length (in metres) of freezer units that were open, and therefore wasting cool air, compared to those which were closed and conserving cool air.

The seasonality indicator remains the same as in 2007 but with the list of in-season products updated to reflect the time of year the survey was conducted¹³.

¹⁰ ENDS Carbon 2009 'UK Supermarkets, 2009 carbon benchmark report, Pg.ix. http://www.endscarbon.com/downloads/ends_carbon_supermarket_summary.pdf

¹¹ F Welravens and J Hailes Environmental Investigation Agency 2009 'Chilling facts; the big supermarket refrigeration scandal' <http://www.chillingfacts.org.uk/uploads/chillingfacts.pdf>

¹² Centre for Environmental Strategy (2006). Fruit and Vegetables & greenhouse gas emissions: exploring the relationship. <http://www.ces-surrey.org.uk/research/publications/>: University of Surrey.

¹³ The study in 2007 was undertaken in April and in 2009 the survey took place in July.

We rated companies on:

- The ratio of open to closed-door freezers
- Seasonal food: the availability, promotion and signposting of nine in-season UK-sourced fruit and vegetables
- Seasonality information: the ability of supermarket helplines and websites to provide information on seasonal produce

The nine fruit and vegetables we looked at were:

- cherries
- raspberries
- strawberries
- cucumbers
- celery
- sugar snap peas
- broad beans
- courgettes
- spinach

We awarded points for:

- the relative ratio of open to closed-door freezers (maximum three points)
- how much seasonal produce was available in store (maximum five points)
- our judgement of their promotion in stores (maximum three points)
- helpline information on seasonal produce (one point)
- website information on seasonal produce (one point)

What we found

Refrigerators: closed versus open doors

All freezers in the Aldi, Lidl and M&S stores we assessed had closed doors and were, therefore, conserving energy. This is the example of good practice that we want all supermarkets to follow. The next best performing store was Tesco with 76 per cent of freezers having doors which close. Several supermarkets (The co-op, Morrisons and Waitrose) had the lowest proportion of closed-door freezers at around 50 per cent.

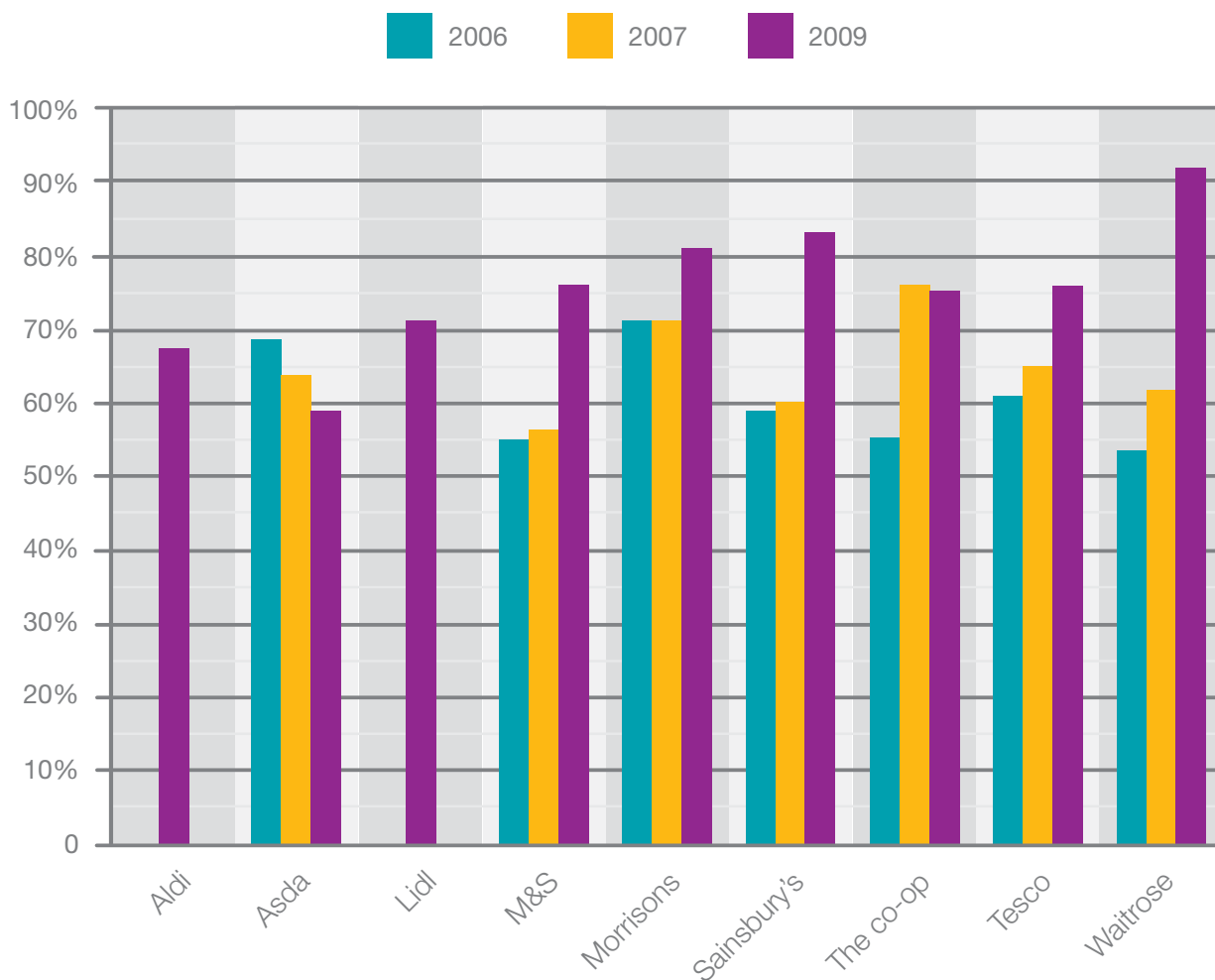
Those supermarkets which didn't have 100 per cent closed-door freezers, had open chest freezers. All upright and overhead freezers in our survey had closed doors. This is an easy win for those retailers who are not yet at 100 per cent in this indicator.

Seasonal food

Of the nine seasonal fruit and vegetables observed, the Waitrose store was top with 92 per cent of produce originating from the UK. Since the last study in 2007, Waitrose has improved by a commendable 30 per cent and in 2009 leads with a nine per cent headway above the next best performing supermarket, Sainsbury's. Sainsbury's has also made a 23 per cent improvement since 2007 and was observed in this year's study to stock 83 per cent UK produce. Morrisons has also made good progress, increasing their UK-sourced seasonal produce from 71 per cent to 81 per cent.

However, in 2007, our survey took place in April when, while there are some well-loved vegetables in season such as carrots, parsnips and potatoes, there is not an abundance of UK-sourced fruits and vegetables available. In contrast, July is a month of plenty for UK-seasonal produce. The supermarkets should all be achieving scores along the same lines as Waitrose, with at least 90 per cent of the nine fruits and vegetables we surveyed being sourced from the UK. We want to see supermarkets aiming for this figure to increase UK fruit and vegetable consumption, and help consumers choose UK-seasonal produce.

The worst performing supermarket on this seasonality indicator was Asda, with a dismal 59 per cent of produce originating from the UK. This result is a decrease in the result since 2006 when 69 per cent of its produce was sourced from the UK. With an abundance of UK produce available, Asda should be doing far better than this.



Note: Aldi & Lidl were not part of 2006 & 2007 studies

We have seen an improvement in terms of available information on UK in-season produce since 2007. The co-op scored full points for in-store signage as well as the information on its website and helpline. M&S, Sainsbury's and Waitrose also did well in all these areas. Lidl had good in-store and helpline information but was let down by their website.

We also looked for recipe cards in the stores to see if retailers were integrating messages about seasonality throughout the store. Morrisons, Waitrose and Tesco did best in this area, where all fruit and vegetables in the recipes were from the UK and in season. However, Morrisons, Asda and Aldi all failed to fully exploit this opportunity to promote UK seasonal foods.

The co-op, Lidl and Tesco's helpline staff provided clear answers to our questions on seasonality and were able to provide a list of seasonal produce, and in the case of The co-op and Lidl, sent additional follow-up information.

Climate change ratings

| A | B | C | D | E |
|-----|--|--------------|---|---|
| M&S | The co-op Lidl Morrisons Sainsbury's Tesco Waitrose | Aldi Asda | | |

.....





Waste: action to reduce, re-use and recycle

What is the issue?

Around 30 million tonnes of household waste are generated in the UK every year, of which 5.9 million tonnes is packaging¹⁴. Packaging and waste rate highly on consumers' environmental concerns: 79 per cent of consumers believe products are over-packaged, while 82 per cent believe packaging is a major environmental problem¹⁵.

What we did

We set out to measure how well the supermarkets help consumers to reduce, re-use and recycle.

We rated companies on:

- the extent to which own-brand breakfast cereal, toilet paper and kitchen towel have declared recycled and FSC content
- presence of, range of and information on recycling facilities inside the store
- incentives to reduce and re-use carrier bags and availability of a bags-for-life scheme

We awarded points for:

- the sustainable content of products and packaging (maximum five points)
- the incentive to re-use carrier bags and the availability of a bags-for-life scheme (one point)
- in-store recycling facilities for four items: batteries, carrier bags, printer cartridges and mobile phones (maximum two points)
- customer service on recycling facilities (one point)
- signposting of recycling facilities (one point)

¹⁴ http://www.wrap.org.uk/retail/drivers_for_change/

¹⁵ Ipsos Mori. Public Attitudes to Packaging 2008

<http://www.ipsos-mori.com/researchspecialisms/socialresearch/specareas/environment/understandingenvironmentnewsletter/packaging.aspx#>

What we found

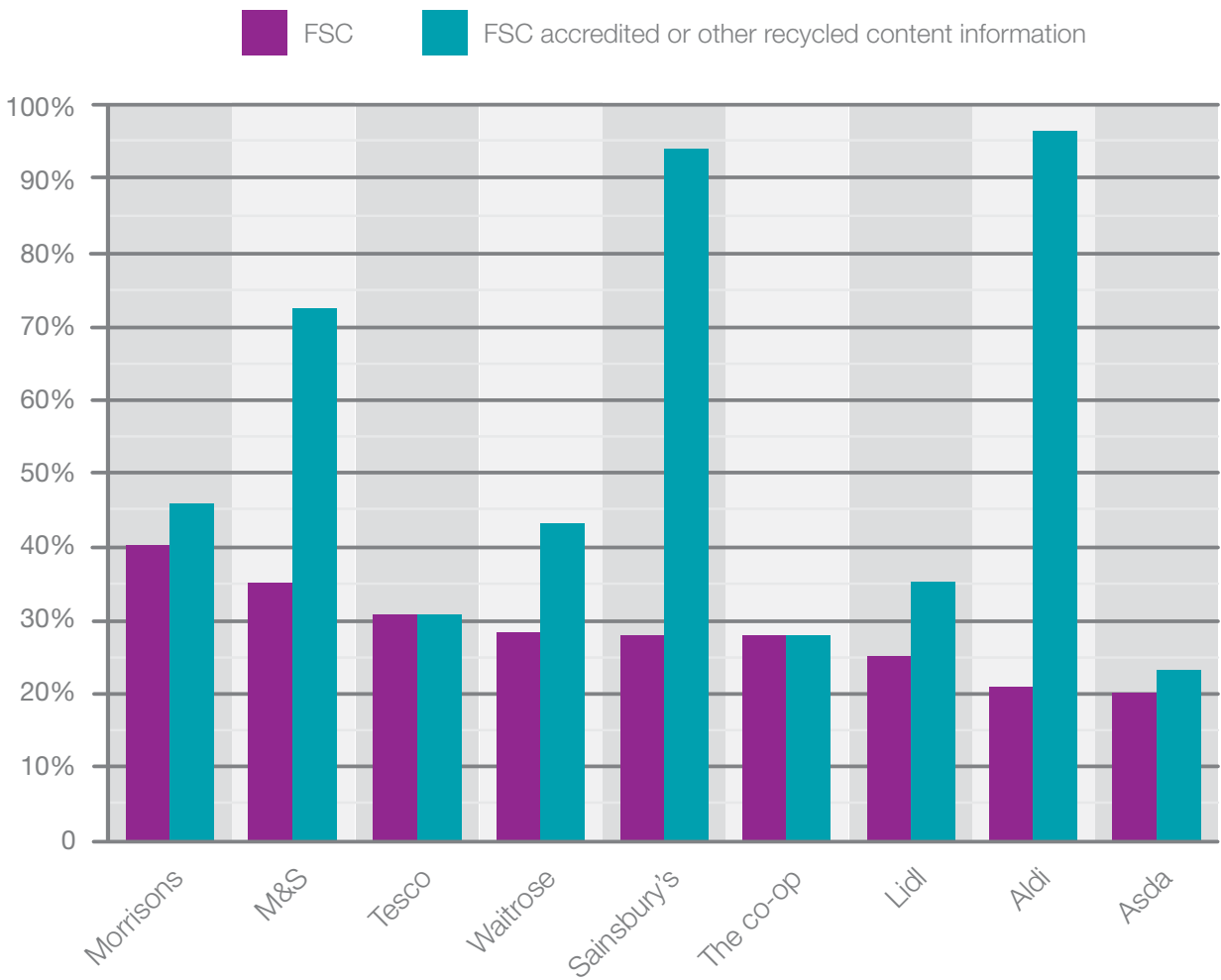
Sustainable content of packaging

Aldi had the highest proportion of products with declared FSC or recycled content in the packaging we surveyed (96 per cent). Sainsbury's was a close second with 94 per cent of the products surveyed. Tesco has made improvements since 2007 with all of their own brand kitchen towel and toilet paper now FSC certified.

However, their score was marred because none of their own-brand cereal packaging had any declared recycled content, which presents a clear opportunity for improvement.

Asda had only two out of 45 cereal boxes with FSC certification while The co-op, Waitrose, Morrisons and Lidl did not have recycled content in their cereal packaging, bringing their scores down in this area. Again, there is room for improvement here for all these retailers.

Per cent overall FSC accredited and recycled content information on packaging of products surveyed



Note: FSC accreditation only applies to paper and card products and thus plastic/foil bagged cereal is not included in the measure

We also examined, but did not score, recycling information on packaging and found a lot of good work. The co-op, Sainsbury's and Aldi labelled all of their boxed cereal and plastic bag/foil bagged cereal with a recycle logo or a message noting recyclability. There were a variety of different messages at different supermarkets but the Sainsbury's and Aldi messages show they are early adopters of the new on-pack recycling scheme (see box), providing recycling information on the different components of the packaging.

Most of the major supermarkets are working with the British Retail Consortium and the Waste Action Reduction Programme (WRAP) on a standardised UK wide on-pack recycling label scheme¹⁶, although Lidl is yet to sign up¹⁷. The on-pack recycling label scheme aims to deliver a simpler and consistent UK-wide recycling message on both all packaging to help consumers recycle more material, more often. This initiative is in its early roll-out phase and therefore was not included in what we looked at in the stores, but is clearly a positive step towards helping consumers recycle packaging.



Carrier bags

M&S, Sainsbury's and Tesco are encouraging consumers to reduce the number of plastic carrier bags by both promoting the re-use of bags and offering a bags-for-life scheme. Sainsbury's and Tesco both offer reward points when customers use their own bags, whereas M&S, Aldi and Lidl charge for standard bags. There is progress at Morrisons since 2007, with a bags-for-life scheme, and replacing a damaged bag-for-life free of charge. All other stores offer this except Aldi and Lidl.

We looked at recycling facilities available in the stores for four items: batteries, carrier bags, printer cartridges and mobile phones. Sainsbury's were the only store surveyed that provided recycling facilities for all four products. Tesco, Waitrose, Morrisons and The co-op had facilities for recycling carrier bags, and all had prominent posters encouraging this. However, they didn't offer facilities for recycling any of the other items. Our assessors found no in-store recycling facilities at M&S, Asda or Lidl.

Behind the shop front: helping consumers to minimise waste

A campaign called 'Love Food Hate Waste'¹⁸ was launched in 2007 aimed at helping consumers, local government and businesses cut back on food waste. It is estimated that one-third of the food we purchase is thrown away at home. As part of this initiative The co-op have been running events across the UK giving information on how consumers can reduce waste, including cookery demonstrations and tips on recycling and home composting. Asda has extensive information in their magazine, and Morrisons and Sainsbury's have campaigns suggesting ways to use leftover food.

¹⁶ On-pack Recycling Label (2009). About the scheme: the on-pack recycling label scheme [online]. Available at: http://www.onpackrecyclinglabel.org.uk/default.asp?section_id=1&content_id=0 [Accessed 10 September 2009].

¹⁷ On-pack Recycling Label (2009). Retailers and brand owners: current members [online]. Available at: http://www.onpackrecyclinglabel.org.uk/default.asp?section_id=2&content_id=6 [Accessed 2 November 2009].

¹⁸ <http://www.lovefoodhatewaste.com/>

Waste and recycling score

A

Sainsbury's

B

Morrisons

C

Aldi
Asda
The co-op
M&S
Tesco
Waitrose

D

Lidl

E

.....

Sustainable fishing

What is the issue?

Over-fishing is widely acknowledged as a significant and growing threat to marine wildlife and habitats, and many fish stocks are reported to be in a state of serious decline. Over-fishing not only reduces fish stocks, which ultimately affects fishermen's livelihoods, but the methods used can have devastating impacts on habitats as well as non-target species such as dolphins, as a result of dredging and by-catching¹⁹.

There are many ways to achieve sustainable fisheries and help fish stocks recover. Supermarkets and consumers have an important role in this. Supermarkets can source sustainable fish and increase public awareness about these issues so future generations can enjoy a healthy diet without concerns about over-exploiting 'at risk' species.

Supermarkets are developing their sustainable fish policies in a variety of ways. Waitrose' corporate policy states they will only source from well managed fisheries. The co-op and Tesco have a responsibly sourced policy while some supermarkets aim for targets of 100 per cent sustainable fisheries policies: Asda and Sainsbury's by 2010, and M&S by 2012. Morrisons says all fresh fish is sourced sustainably and fresh fish counters are certified by MSC.

What we did

We set out to look at how well the supermarkets enable their customers to choose sustainable options by looking at the availability and promotion of sustainably sourced fish in stores. We also spoke to their helplines and looked at their websites.

We rated companies on:

- availability of sustainably sourced pre-packed fresh fish, frozen fish fingers and tinned tuna
- information on sustainable sourcing through store signage, helplines and websites

We also looked to see if 'at risk' fish were on sale²⁰.

¹⁹ Marine Conservation Society (2009). Fisheries: fishing for the future [online]. Available at: <http://www.mcsuk.org/mcsaction/fisheries/fishing+for+the+future> [Accessed 10 September 2009].

²⁰ We used the MCS fishonline website (<http://www.fishonline.org/advice/avoid/>) to identify 'at risk' fish species. If an 'at risk' fish was found, we would remove one point from the score. However, we did not find any 'at risk' items so no points were removed in this indicator.



What we scored points for:

- availability of sustainably sourced fish (maximum five points)
- customer information in stores, through the helpline and on a website (maximum five points)

What we found

Sustainably sourced items had a message about the produce's sustainability on 100 per cent of Waitrose's sustainably sourced produce, 95 per cent of M&S's and 94 per cent of Sainsbury's. This is a continuation of form from M&S and Waitrose, and an excellent improvement by Sainsbury's. Sainsbury's had the most comprehensive information printing details such as origin, the way fish are caught, fishery and welfare. In the case of M&S and Waitrose the information was typically a note printed on the front of the packaging saying, for example, 'our sustainably sourced cod loin', or just the words 'sustainably sourced'. Sainsbury's printed more detailed information on sourcing methods.

Sainsbury's sold the most MSC-certified products and was also the only store to have certified products in all the categories: fresh packaged fish, fish fingers and tinned tuna. In fact, in 2008, Sainsbury's introduced the policy that all own-brand fresh and canned tuna would be pole and line caught, a more sustainable method of catching fish. This is well ahead of other supermarkets. Sainsbury's also announced they are using sustainable palm oil in their 'basics' fish fingers. This is a welcome development as there are concerns about palm oil plantations expanding and encroaching on sensitive tropical areas.

We chose not to rate Aldi on this measure because of the small sample of own-brand fish we found in the store.

We found it difficult to clearly establish whether supermarkets are selling 'at risk' fish. We think, from the information collected in our survey, that we did not find any 'at risk' fish on sale in the stores. However, there was a lack of information on the origin and method of catching the fish we saw. For example, some retailers sold north-east Atlantic cod. From certain areas of the north-east Atlantic (such as Greenland, West of Scotland and some areas of the Norwegian Coast), cod is an 'at risk' fish. However, the Barents Sea and Norwegian Sea have a healthy offshore stock of cod. Supermarket labels did not provide enough information for us to tell if the fish was from sustainable sources or not. We encourage all supermarkets to continue to improve their 'at risk' fish policies, making sure they source their fish from sustainable sources.

M&S, Sainsbury's and Waitrose all provided clear signage and communication of their sustainable fishing policies. M&S had a large and prominent sign at the back of the store saying: 'We believe in sustainable fishing. Hook, line and sinker'. At the Waitrose fish counter there was a sign clearly stating: 'Thought for food, we only sell fish from well managed fisheries using responsible fishing methods' and at the Sainsbury's counter a sign said: 'We work closely with suppliers to bring you the widest range of MSC labelled fish products in the UK'.

All other retailers had little or no communication regarding their sustainable fishing policies anywhere in store.

The co-op, Lidl, M&S, Tesco and Waitrose helpline staff all received good ratings regarding their knowledge of the supermarket's sustainability policies. Tesco and M&S staff quoted their policy clearly (and M&S gave examples of a new tuna policy), and also directed the caller to the website for further information. Waitrose staff confirmed fish only come from dedicated suppliers and sustainable sources; they also offered to both call back and send out further information. Asda helpline staff could not provide any information on sustainable fishing policies.

The co-op staff confirmed they 'launched a responsible fishing policy in 2008, which covers all fresh, frozen and tinned fish'; they also sent out detailed information. Despite a good corporate policy and helpline information, it is disappointing this failed to translate into on-pack information or promotions in our surveyed store. The co-op only had a small number of products to survey but none of these had any information on sustainable sourcing. With the new policy in place, it is hopefully only a matter of time before packaging and promotions are updated.

All supermarkets, with the exception of Aldi, provided information on sustainable fishing policies on their websites. Some performed better than others: M&S, Morrisons, Sainsbury's, Waitrose, Asda and The co-op had a good range of information. For Tesco, the information on sustainable fishing methods was limited.

Behind the store: helping the consumer to engage with the issues

Waitrose has sought to engage consumers through supporting the recent film on over-fishing, 'End of the line'. The co-op is trying to engage consumers through a 'Marine reserves now' campaign, jointly with MCS, which is designed to promote 30 per cent marine reserves to help the marine environment recover from over-fishing and habitat destruction. Sainsbury's promotes more sustainable alternatives for consumers, and M&S plans to run consumer awareness campaigns promoting less well-known fish in 2009/10. The co-op committed £200,000 to supporting fisheries to get Marine Stewardship Council (MSC) certification in 2008.

Sustainable fish score



Aldi - No score

.....

Sustainable farming

What is the issue?

This indicator covers a broad range of issues: organic produce, fairly traded products and higher animal welfare. Despite the economic downturn, these issues remain important to consumers. Although there has been some decline in sales of organic products, this is by no means consistent across all products and, indeed, some have shown an increase²¹. With more than two-thirds of consumers either 'very worried' or 'fairly worried' about pesticide residues in fruit, vegetables and cereals²², organic produce remains an important sustainability issue for supermarkets to tackle.

Sales of certified Fairtrade products were up 43 per cent in the UK between 2007 and 2008²³, showing ongoing consumer commitment to buying fairly traded products. These allow consumers to make purchasing decisions knowing that certain ethical and environmental standards have been met, allowing farmers and workers in developing countries to get a better deal.

Consumers are becoming increasingly concerned about the way farm animals are treated with around one in four shoppers actively seeking higher welfare meat. Animal welfare does not receive enough importance in the UK's food and agriculture policy, according to 62 per cent of consumers²⁴. There are a number of animal welfare labelling schemes for meat and eggs with different welfare levels. This gives consumer choice but can add to consumer confusion.

What we did

We rated companies on:

This indicator has been expanded since 2007 from focusing solely on organics and pesticides to addressing wider sustainability issues concerning animal welfare and fair trade. We looked at signage in stores directing customers to these products, the knowledge of helpline staff and information on websites.

²¹ The Guardian (6 April 2009). Recession takes a bite out of organic product sales [online]. Available at: <http://www.guardian.co.uk/environment/2009/apr/06/organic-sales-soil-association> [Accessed 10 September 2009].

²² European Commission 2006 Risk Issues Eurobarometer, p.156 European Commission.2006 Available at: http://ec.europa.eu/food/food/resources/special-eurobarometer_riskissues20060206_en.pdf,

²³ Fairtrade Foundation (17 April 2009). 'Fairtrade flows against the tide.' Press release. Available at: http://www.fairtrade.org.uk/press_office/press_releases_and_statements/april_2009/fairtrade_flows_against_the_tide.aspx [Accessed 10 September 2009].

²⁴ European Commission. Attitudes of consumers towards the animal welfare of farmed animals, Eurobarometer Reference number 229 European Commission Available at: http://ec.europa.eu/public_opinion/archives/ebs/ebs_229_en.pdf Accessed 10 September 2009

Organics

- the provision of organic options for ten fresh produce items of concern for higher pesticide residue levels

The ten items we looked at were:

- nectarines
- grapes
- oranges
- bananas
- cherries
- raspberries
- strawberries
- cucumber
- celery
- sugarsnap peas

The proportion of six own-brand fairly traded products²⁵

The six products we looked at were:

- coffee
- tea
- chocolate (bars)
- cocoa/hot chocolate
- sugar
- bananas

Proportion of higher welfare pork and chicken meat and egg-laying hens²⁶

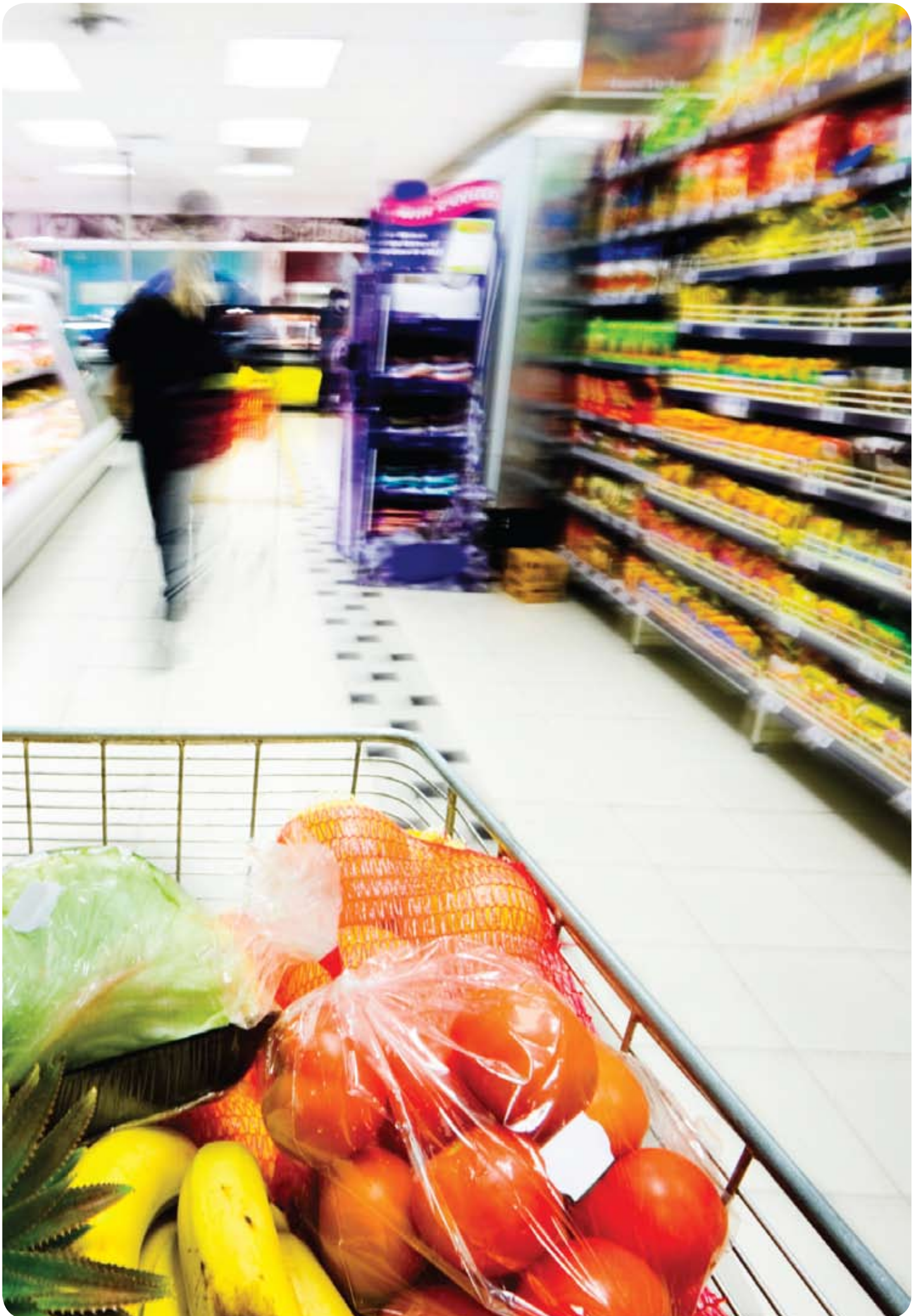
Signposting and promotion of fairly traded and higher welfare products

We scored points for:

- the availability of ten organic products (maximum five points)
- the availability of six fairly traded products (maximum five points)
- the availability of higher welfare pork, chicken and eggs (maximum five points)
- the promotion of fairly traded products and higher welfare products in store and sustainable farming on websites (maximum five points)

²⁵ We included independently verified certification schemes. We also noted any products with other ethical trading messages.

²⁶ We have looked at fresh chicken, pork and eggs available in stores for the proportion that were RSPCA Freedom Food endorsed, free range, organic and those with printed information regarding higher animal welfare of the poultry and livestock.



What we found

Organics

Only two retailers, Tesco and Sainsbury's, had increased their offering of organic produce by three per cent and two per cent respectively, since the previous study in 2007. In fact, year-on-year, Tesco are the only retailer to grow their offering since our first study in 2006.

Tesco stocked the highest proportion of organically certified produce with 23 per cent. They also had the highest proportion of organic produce on promotion at 15 per cent. The next highest proportion was achieved by both Waitrose and Sainsbury's, with 14 per cent each. Asda, Morrisons, M&S and The co-op have all decreased their proportion of organic produce since the previous study. We welcome the fact that 52 per cent of products observed in the The co-op were labelled with the following information: 'Conventionally grown, reducing, banning and controlling pesticide use,' which helps tell consumers about the supermarket's policy on pesticides.

The only other supermarket to label non-organic produce with a message indicating sustainable farming was Waitrose, with 11 per cent of produce labelled with the Leaf (Linking Environment and Farming) mark²⁷.

Supermarkets can do more in this area, making sure their suppliers use minimal residues on products, and help develop farm management systems that use fewer or no chemical methods.

Fairly traded

The highest proportion of certified Fairtrade and ethically-labelled products was found in The co-op, with an impressive 95 per cent among the products surveyed. In fact, 100 per cent of The co-op own-brand coffee, tea, chocolate bars, cocoa/hot chocolate and sugar were Fairtrade products. This reflects the high importance The co-op places on these issues within their business, to help lift millions of producers out of poverty. They also signposted these issues in-store with, for example, a large sign on a pillar in the coffee and tea aisle advertising Fairtrade and a prominent sign in the till area encouraging the use of Fairtrade reusable cotton bags.

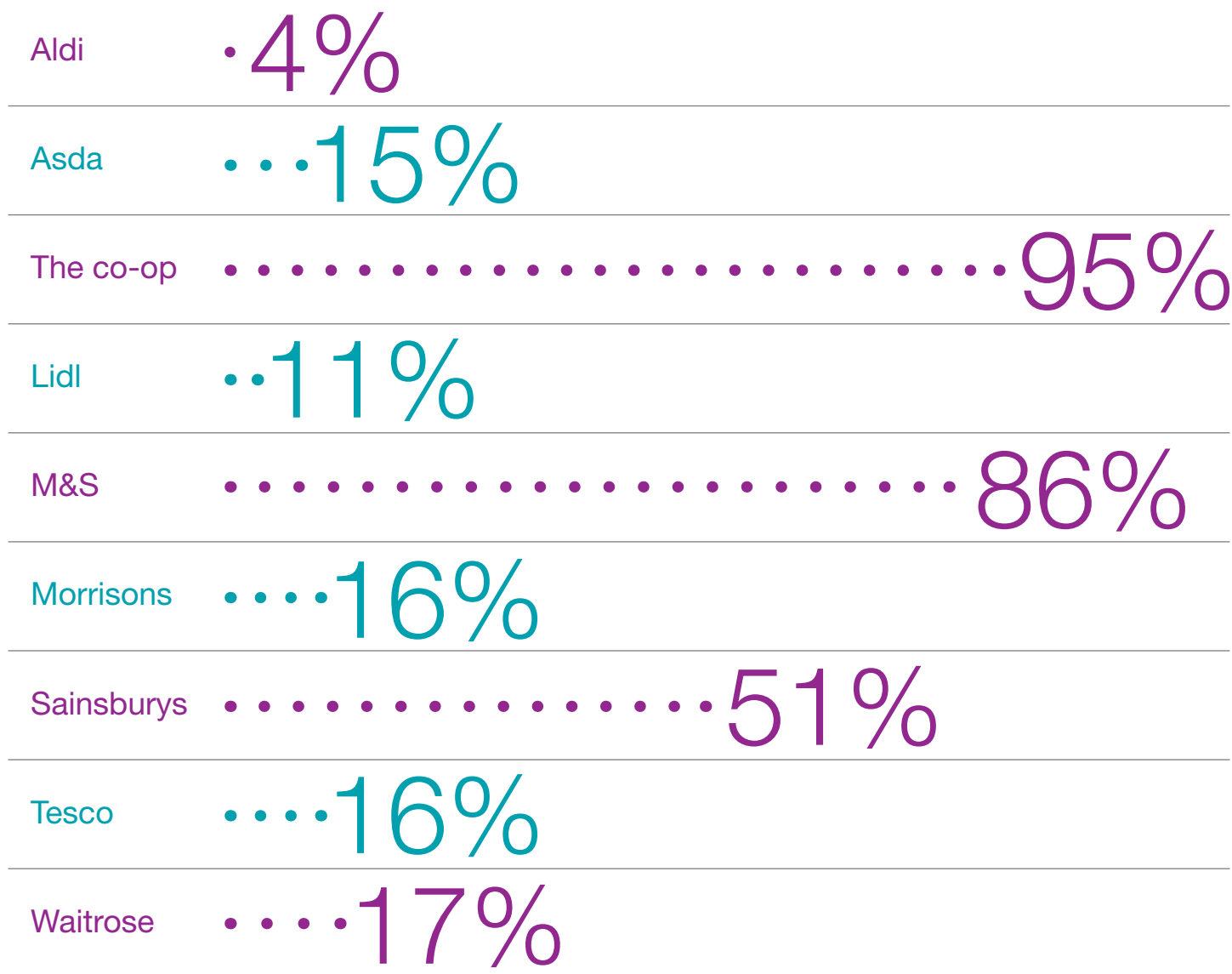
The next best supermarket for fairly traded products was M&S with 86 per cent of surveyed products, and 100 per cent of all their tea and cocoa/hot chocolate found to be Fairtrade. Sainsbury's were third with 51 per cent of the target products surveyed having Fairtrade or Rainforest Alliance certification. All Sainsbury's bananas, sugar and tea were certified Fairtrade. They also had the highest proportion of ethical products on special offer and had signs in the store promoting Fairtrade.

In Waitrose, products were labelled with different ethical trading messages. For example, a high proportion of own-brand coffee had an ethical message saying: 'Waitrose has a sustainable relationship with their coffee growers'. Out of the 'big four'²⁸, Asda had the lowest percentage of fairly traded products in our survey.

In Aldi, Asda, Morrisons, M&S and Tesco, our assessors found no promotions or signposting relating to ethical trading.

²⁷ Leaf (2009). Home page [online]. Available at: <http://www.leafuk.org/leafuk/> [Accessed 10 September 2009].

²⁸ Tesco, Sainsbury's, Asda and Morrisons are the four retailers with the biggest market share in the UK according to the latest TNS worldpanel research,



Behind the scenes: the retailers and fair trade

Supermarkets are undertaking behind the scenes activities such as the UK Ethical Trading Initiative (ETI)²⁹. While the ETI is not a fair trade scheme, and does not guarantee poor farmers a good price for their produce, it is a step in the right direction. It is an alliance of companies, trade unions and voluntary organisations working together to improve the lives of workers across the globe through measures such as allowing unionisation and not exploiting children. Asda, The co-op, M&S, Sainsbury's and Tesco are members of the ETI, and have agreed to adopt a base code covering issues such as workers' conditions, pay, working hours and treatment.

The co-op, M&S, Sainsbury's, Tesco and Waitrose work with SEDEX³⁰, the ethical trade audit membership organisation, to ensure improved ethical performance of their supply chains. The co-op also has a human rights policy and has committed £1 million per year to alleviating poverty in the developing world.

²⁹ <http://www.ethicaltrade.org/>

³⁰ www.sedex.org.uk

Higher animal welfare standards

The co-op store comes top in terms of stocking the highest proportion of RSPCA Freedom Food accredited produce, with 34 per cent accredited by the scheme. Morrisons also stocked a good range of RSPCA Freedom Food accredited products (32 per cent of the products surveyed).

Looking further into The co-op produce labelling, they also performed well in information provision on packaging: 97 per cent had an animal welfare messages such as 'outdoor reared'. This gives consumers good access to information on animal welfare and helps inform their purchasing decisions. M&S had on-pack information on all of their products. Lidl and Aldi did not provide any information on chicken and pork denoting higher welfare standards except for one free-range product in Aldi.

Looking specifically at the whole eggs sold in the nine stores surveyed, five supermarkets, The co-op, Morrisons, Sainsbury's, M&S and Waitrose, sold 100 per cent free-range whole eggs. However, Morrisons does not have a 100 per cent cage-free policy in place (unlike the other supermarkets). It has a commitment to go cage-free on its own-brand eggs by 2010 but this does not include branded shell eggs.

Asda and Tesco are almost there, with 85 per cent and 80 per cent, respectively. Aldi and Lidl stocked three eggs types: two of which were free range, one caged.

All supermarkets should introduce targets to be 100 per cent cage-free (which includes barn and free-range eggs) if they have not done so already.

In addition, they should also follow M&S's lead and introduce free-range eggs into processed products and ready meals, in which some of the worst welfare meat and eggs continue to be sold.

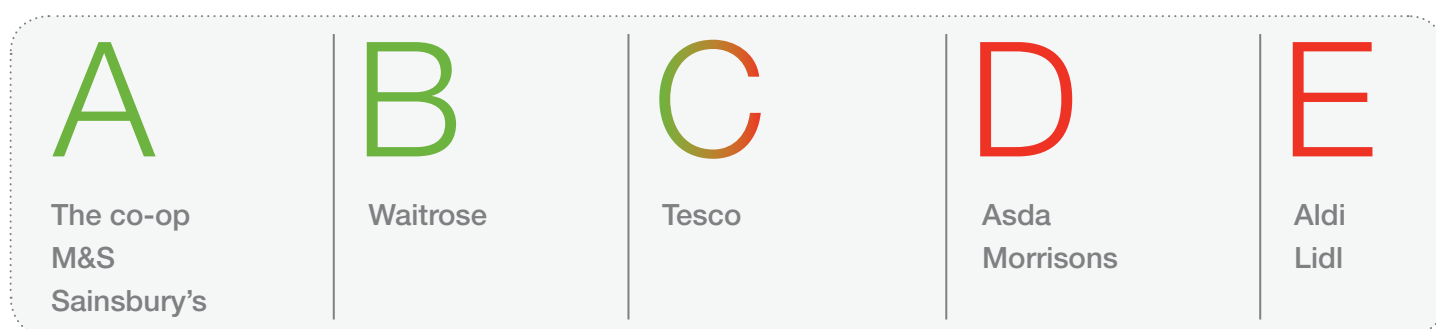
The co-op, Sainsbury's and Waitrose also promoted animal welfare issues around the store but we did not see any signs in the other stores we visited.

Website information

Asda, The co-op, Morrisons, M&S, Sainsbury's, Tesco and Waitrose all rated highly for the information on their website relating to organic products and pesticide reduction, fair trade, and animal welfare policies. Only The co-op showed a prominent banner on their home page – this was about Fairtrade.

Aldi did not have any information on their website relating to any of the sustainable farming issues surveyed.

Sustainable farming score



.....

Conclusions

In the current economic climate, and with the current focus on value in many of the supermarkets, there could have been a risk that, since our last survey, sustainability issues were pushed to one side. However, the findings in this 2009 survey show an improvement, with two supermarkets now reaching the top A grade. Sainsbury's and M&S have done particularly well, both scoring three As in three of the four categories, representing the highest scoring supermarkets in the history of these studies. The challenge for other retailers is to replicate these achievements across the board. We have also seen some A's achieved by other supermarkets in specific areas. The co-op achieved its first ever A rating, for sustainable farming, and Waitrose maintained their A rating for fish.

However, these overall A-grade scores do not mean that Sainsbury's and M&S have nothing more to do. This survey looks at consumer-facing indicators, encouraging supermarkets to make sustainable choices easier for consumers. It does not address many of the important behind-the-scenes sustainability issues, such as greenhouse gas emissions or the amount of waste sent to landfill, among others. There is still a long way to go before the supermarkets in this survey, even the ones scoring A grades, can be satisfied they have done all they can to improve the sustainability performance of their businesses.

We have seen progress in the provision of UK-sourced seasonal produce and we hope this is a trend that will continue. In 2007, we saw only three stores achieve better than 70 per cent of UK-sourced, in-season produce, with the highest percentage at 80 per cent. In 2009, seven stores had higher than 70 per cent, and the highest score was 92 per cent. However, these improvements should have been better. In 2009, we carried out our survey in July, as opposed to April in 2007. July has a much better choice of UK-sourced produce and supermarkets should all have achieved 90 per cent or more. There is a need to encourage consumers to reconnect with UK seasonal food, and encourage them to change their diet to reflect what is available in the UK at different times of the year. Supermarkets have a prime opportunity to contribute to this.

It was difficult to know whether retailers were selling 'at risk' fish because of the lack of clarity about the places of origin. This makes it difficult for consumers to make sustainable purchasing decisions in this area. MSC certification helps as it gives a clear indication of sustainable sourcing. However, there is also a role here for supermarkets to promote more sustainable but less well known fish to consumers, encouraging a move away from a reliance on fish such as cod. Supermarkets are developing what appear to be robust corporate policies in this area but the challenge is now to translate these ambitions into stores and communicate these messages to consumers.

Broadening of our sustainable farming indicator to include fairly traded products and higher animal welfare offered a better opportunity to capture supermarkets' actions. The high scores of some supermarkets in these new areas shows how issues are embedded within sourcing policies, targets and ethos; something for all supermarkets to aim for.



Overall, our research shows that there is still more that can be done to help consumers make more sustainable choices by improving the co-ordination and overall impression of in-store signposting as well as further developing helplines and websites. Our research showed that there was considerable variation between the supermarkets on how well they communicated with consumers. There are so many more opportunities to tie together all the communication and promotion opportunities. For example, using seasonal, higher welfare and fair trade ingredients in recipe cards and magazines; placing prominent signage around stores to promote these issues and products; and highlighting these issues on online grocery shopping websites. Some supermarkets are seeking out these opportunities more than others but it is a quick win area they could all improve on.

As in 2007, we ask the supermarkets to adopt our recommendations for future action, setting high environmental targets and to report on progress in an open and transparent way. We applaud both M&S and Sainsbury's for achieving A grades but, as ever, there are always improvements that can be made.

We know that our indicators are just that, indicators of activity by these large supermarkets in the very broad and complex area of sustainability. We recognise the considerable amount of work they are undertaking behind the scenes to tackle climate change, recycling and sustainable sourcing, but our results show that still more can be done in stores to help consumers be more sustainable.

.....

Recommendations

We believe supermarkets can do more to help their customers engage with the sustainability agenda and help them make more sustainable choices. We call on supermarkets to adopt the following recommendations:

Climate change

Continue to make efficiency savings by putting doors on all freezer units and using less harmful gases in freezer units during regular replacement programmes.

Explore and progress consumer acceptance to doors on chillers.

Engage with suppliers to ensure a secure supply of UK-seasonal produce.

Promote seasonal produce in stores and online by, for example, developing tie-ins with recipe cards and magazines.

Adopt a promotions policy which offers incentives for the purchase of environmentally friendly foods, especially unprocessed foods and those that are mainly plant-based.

Waste and recycling

Give consumers incentives to reduce and re-use carrier bags and introduce bags-for-life schemes.

Make maximum use of recycled and sustainably sourced certified packaging materials such as FSC certified materials, and label products accordingly to inform consumers.

Tell consumers about the need to reduce, re-use and recycle. Put the new standardised on-pack recycling label on all products.

Provide a full range of well signposted recycling facilities inside stores as well as outside, where possible.

Sustainable fishing

Set specific and stretching targets for sustainable sourcing and help suppliers meet strict sustainable fisheries criteria.

Extend ranges of MSC certified products.

Tell consumers about sustainable sourcing policies.

Source from the MCS fish-to-eat list and take non-sustainable fish off the shelves. Help consumers choose and appreciate a wider variety of sustainable fish species through product innovation and promotional activity.

Sustainable farming

Set targets for increasing the range of organic and other low pesticide food options.

Set targets for increasing the range of fairly traded and higher welfare products.

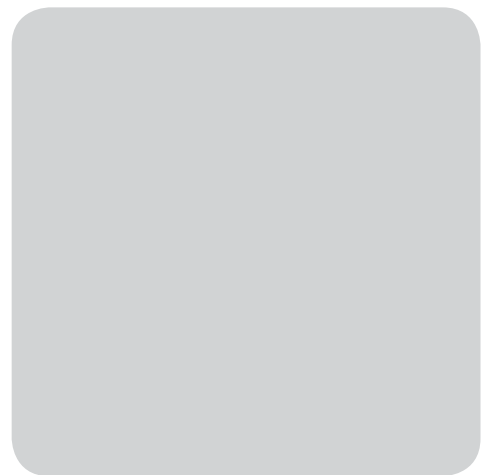
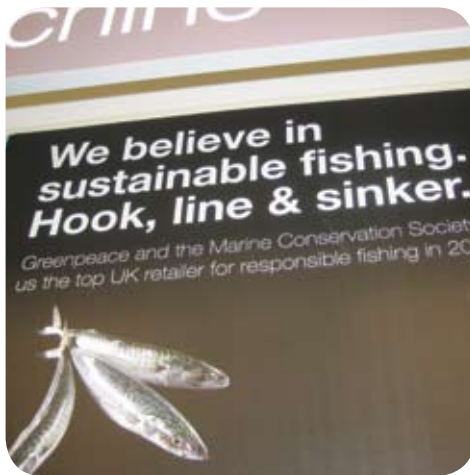
Customer engagement

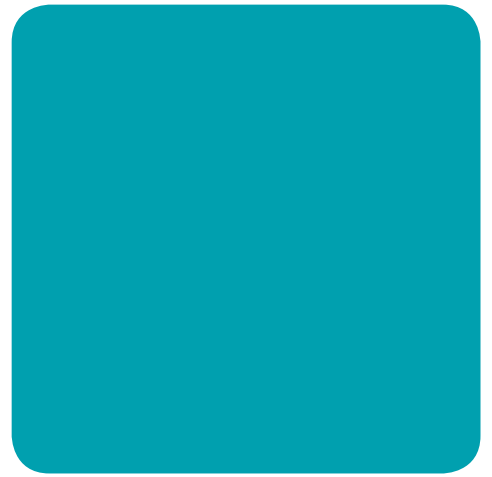
Communicate sustainability issues to consumers effectively, not just in stores but also on helplines and websites, linking in relevant issues to online grocery shopping, where available.

Effectively communicate to consumers about the 'smart' use of products, helping them use products in such a way as to minimise energy and water use in the home and reduce waste.

.....







Green to the core?

How supermarkets can help make greener shopping easier

www.consumerfocus.org.uk

Copyright: Consumer Focus

Published: November 2009

Written by Jeff Allder and Lucy Yates, Consumer Focus

If you require this publication in Braille, large print or on audio CD please contact us.

For the deaf, hard of hearing or speech impaired, contact Consumer Focus via Text Relay:

From a textphone, call **18001 020 7799 7900**

From a telephone, call **18002 020 7799 7900**

Consumer Focus

4th Floor
Artillery House
Artillery Row
London SW1P 1RT

Tel: 020 7799 7900

Fax: 020 7799 7901

Media Team: 020 7799 8004 / 8005 / 8006

ISBN: 978-1-907125-06-5