

greening supermarkets

how supermarkets can help
make greener shopping easier

by Sue Dibb



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Executive summary

Supermarkets have a key role to play in helping us do our bit for the environment. Recent months have seen a number of the big stores pledge to cut waste and plastic bag use, stock more local and seasonal produce and use more green energy.

While the NCC welcomes these steps, our ground-breaking research shows there is much more that supermarkets can do. This report identifies simple actions that all supermarkets can take now to help their customers be greener shoppers.

Our supermarket survey – conducted in March this year – goes behind the headlines to rate the top eight food stores on a range of consumer-focused environmental indicators (see panel, right), including food transport and seasonality, waste and recycling, support for more sustainable sourcing (fish and wood products) and sustainable farming.

We found that where you shop really can make a difference to your environmental ‘footprint’. We found stores showing leadership in some areas, but no single retailer – even our top scorer – rated well in every area that we looked at. All the supermarkets in our survey have significant potential to improve their consumer-facing ‘green’ credentials.

Small changes by supermarkets and their customers really can make a difference. Most of us shop in supermarkets regularly, and just four retailers – Tesco, Asda, Sainsbury’s and Morrisons – take three-quarters of what we spend on groceries. Because of their size, a decision by these to reduce excess packaging and source more local, seasonal food, for example, would provide significant environmental benefits.

We were particularly disappointed by the low level of engagement with customers on green issues that we found in-store and through our

helpline surveys. This includes scant information about, or promotion of, greener choices (such as seasonal produce or sustainable fish) or green behaviour (such as recycling, or reducing carrier bag use). As few of us understand how our everyday choices impact on the environment, this is a lost opportunity to engage the public, and to support behaviour change towards more sustainable consumption.

Food – through the way it is produced, processed, packaged and transported – is the average household’s number one impact on climate change, calculated to be responsible for around a third of our climate impacts⁽¹⁾. The CO₂ emission from air-freighting just one small punnet of out-of-season strawberries from New Zealand is equivalent to eleven school runs in the car. But we found it wasn’t always easy for shoppers to tell where food came from and it was impossible, typically, to tell how it was transported.

The NCC’s Greening Supermarkets indicators

1. Food transport: reducing its impact on climate change

- ▶ Seasonal food: availability, promotion and ‘signposting’ of ten ‘in-season’ UK-sourced vegetables.
- ▶ Seasonality information: ability of supermarket telephone helplines to provide information on seasonal produce.

2. Waste: action to reduce, reuse and recycle

- ▶ Recycled content: declared recycled content of breakfast cereal packaging, toilet paper and kitchen towels.
- ▶ Carrier bags: incentives to reduce use, or encourage reuse of carrier bags, including ‘bags for life’.

3. Nature: supporting sustainable sourcing

- ▶ Fish: availability of sustainably sourced fish (including those with Marine Stewardship Council (MSC) certification) and information to consumers.
- ▶ Trees: availability of toilet paper and kitchen towels, and wooden kitchenware certified by the Forestry Stewardship Council (FSC), or with high recycled content.

4. Sustainable farming

- ▶ Organics: availability of organic choices in ten food products.
- ▶ Pesticides: clear communication of pesticide reduction strategies, or other ‘low chemical’ options.

We know that many people want to do their bit for the environment, but the green choice is often more difficult, more expensive, or harder to find – or find out about. The solution lies in making greener choices and behaviour easier, in making them part of people’s everyday experiences.

And that’s where supermarkets come in. We want to see supermarkets being a positive catalyst for change.

By choosing the products they make available for us to buy (‘choice-editing’) they can help bring out the responsible consumer in all of us by making environmentally-friendly products the norm, not just a niche market for dedicated green shoppers. We call on supermarkets to pledge their support for our Greening Supermarkets Challenge (see page four).

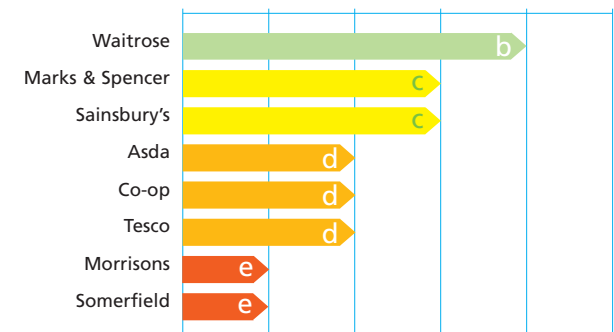
This report focuses on one part of the relationship between grocery retailers and the environment.

All companies told us that they recognise their role in helping to tackle the global environmental challenge. Some, but not all, told us of specific targets that they aim to achieve in coming years. But we want to see more ambition, more clarity in companies’ targets. We want to see them reporting annually to improve their ratings for all our indicators.

How the companies scored

- Overall, Waitrose rated best – B – with good scores on sustainable sourcing. But it also had the highest number of fruit likely to have been airfreighted.
- Of the big four retailers, Sainsbury’s received the best rating – a C – along with M&S.
- We rated Asda, Co-op and Tesco with a D – showing room for improvement.
- Somerfield and Morrisons received a poor E rating.

Overall ratings



We rated supermarkets using an A-E rating system (inspired by energy efficiency ratings used for fridges and dishwashers).

- A = excellent
- B = good
- C = showing potential
- D = room for improvement
- E = poor

What we did

Our survey was designed to reflect the experience of ordinary consumers. Its findings are based on what we found in-store and on telephone helpline surveys conducted in March 2006. The overall company ratings give equal weight to each of our four key areas.

We included the top eight food retailers in our survey: Asda, Co-op, Marks & Spencer, Morrisons, Sainsbury's, Somerfield, Tesco and Waitrose. For each company, we surveyed two stores; our findings are based on an average of these. We selected one store in the Northeast of England centred on Newcastle, and one in the Southeast, focusing on stores close to urban centres, in a broad cluster touching on the counties of Surrey, Berkshire and Hampshire.

We chose larger stores that could reasonably be expected to provide a wide range of products and promotions and to reflect the shopping experiences of consumers in our two areas.

In addition, we wrote to companies asking for details of their relevant policies (these are summarised in appendix one). We present our findings in the context of what companies told us, but our ratings are based on what we found in-store.



The NCC's Greening Supermarkets Challenge

We think supermarkets can do more to help their customers to make greener choices. We call on supermarkets to pledge their support for our Greening Supermarkets Challenge and:

- ▶ **make green mainstream – not just a niche market for green shoppers.** Ensure that all own-brand products and packaging meet high environmental standards. For example, set targets for all products to be sustainably sourced and all paper products and packaging to have recycled content.
- ▶ **make it easier for consumers – take less sustainable products off the shelves.** For example, set targets for when all products, including fish and wood products, will be sourced sustainably.
- ▶ **inform, engage and inspire your customers** – use creative communication to engage customers with ways in which they, and your company actions, can make a difference.
- ▶ **lead by example** – help make people feel they are part of something bigger. For example, introduce front-of-store recycling.
- ▶ **offer incentives** – make green the 'positive choice' by offering loyalty card points or other incentives, including price offers for greener choices.
- ▶ **be aspirational** – publish a strategy with clear targets to improve ratings for all of the NCC's indicators, as part of the company's environmental corporate social responsibility (CSR) policy, and report annually.

In our specific key areas:

Food transport

- ▶ Source, identify and promote UK seasonal produce all year round. Help consumers to reconnect their eating to the seasons.
- ▶ Monitor and reduce the amount of produce that is transported long distances, particularly by road and airfreight. Put the mode of transport on the label.

Waste

- ▶ Make greater use of recycled materials. For example, in packaging and mainstream paper products, to reduce the demand for natural resources, set targets for 100 per cent recycled content.
- ▶ Set ambitious targets for reducing the use of plastic carrier bags and encouraging reuse and recycling of the rest.

Nature

- ▶ Set ambitious targets for sustainable sourcing, including 100 per cent sustainably sourced fish and wood products.
- ▶ Communicate with customers about sustainable choices, including offering incentives to support behaviour change. Take the least sustainable products off the shelves.

Sustainable farming

- ▶ Set targets for increasing the range of organic and other 'low chemical' food options.
- ▶ Set ambitious targets for eliminating 'risky' chemicals, including pesticides from food production, and for minimising pesticide residues in food. Publish results of residue testing programmes annually.

The report cards



Name: **Asda**
Date of report: **March 2006**

Comments	Rating
Food transport Seasonal UK-sourced food Good. Along with Morrisons, had the highest proportion of UK-sourced veg (69%), and was the supermarket doing most to highlight British veg. Opportunity for more customer information on 'seasonality'.	B
Waste Reduce, reuse and recycle Poor: no declared recycled content on own-brand cereal packaging or toilet paper, though company told us 'Shades' own-brand toilet paper has 40% recycled content. This wasn't declared on the label. No disincentives on carrier bags found. Told us it plans to reduce plastic bag use by 40%.	E
Nature Fish Room for improvement: fish counter staff unable to provide information. Two MSC-certified products found. Told us it plans to stock only fish from MSC standard sustainable fisheries in next 3-5 years.	D
Trees Poor: no FSC-certified wooden kitchenware found. Company told us 'Shades' toilet paper has 60% FSC-certified content (but not declared on label).	E
Sustainable farming Organics/pesticides Room for improvement: limited range of organic produce with some in-store promotion. Plans to triple organic range this year. Some LEAF products found.	D
Overall comments and score Top scorer on sourcing and promoting UK produce - with potential to do more to signpost seasonality - but lagging behind on other indicators. We encourage Asda to communicate its recycled content on its own-brand toilet paper.	D




Name: **Co-op**
Date of report: **March 2006**

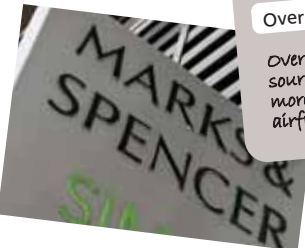
Comments	Rating
Food transport Seasonal UK-sourced food Showing potential: 55% of seasonal veg was UK-sourced, but had little signposting or promotions apart from a few Union Jack flags on products. Helpline unable to help, but referred to local store which produced list of UK produce available. Had the smallest amount of 'long distance' fruit from outside Europe.	C
Waste Reduce, reuse and recycle Room for improvement: only company we found that had more than one own-label toilet paper with 100% recycled content (giving a B rating), but poor overall due to no declared recycled content on own-brand cereal packaging or incentives to reduce carrier bag use except availability of 'bags for life'. Company told us it has pioneered degradable plastic bags and compostable packaging.	D
Nature Fish Poor: unable to provide information on sustainable fish. No MSC-labelled products found.	E
Trees Showing potential: one-third of wooden kitchenware products FSC-certified and FSC content in one own-brand toilet paper.	C
Sustainable farming Organics/pesticides Showing potential: small fresh produce sections with little variety, including organic. Some LEAF products found and good labelling on non-organic produce: 'conventionally grown; reducing, banning and controlling pesticide use' and posters: 'We ban more pesticides than any other retailer'.	C
Overall comments and score A disappointing overall score for the Co-op. Has potential to build on 'ethical' commitments and pioneering packaging work to improve scores in all areas.	D



Name: Marks & Spencer	
Date of report: March 2006	
Comments	Rating
<p>Food transport</p> <p>Seasonal UK-sourced food</p> <p>Room for improvement: more emphasis on promoting non-seasonal and exotic produce than on UK-sourced in-season vegetables. No information on seasonal produce available through helpline. Along with Waitrose, had comparatively more fruit likely to have been airfreighted long distance, including Mexican raspberries and blackberries and Australian nectarines.</p>	D
<p>Waste</p> <p>Reduce, reuse and recycle</p> <p>Room for improvement: all breakfast cereal packaging contained a minimum 50% recycled content (E rating) but let down by having no toilet paper or kitchen roll with declared recycled content and no incentives to reduce carrier bag use, other than 'bags for life'.</p>	D
<p>Nature</p> <p>Fish</p> <p>Excellent: leading the way. Sources all fish from sustainably managed sources. Communicates issue with customers through leaflets and posters in-store. Staff able to help with information.</p>	A
<p>Trees</p> <p>Room for improvement: no FSC-certified wooden kitchenware. However, company told us it is committed to sourcing increasing amounts of FSC-certified products as member of WWF Forestry Trade Network. Also, has pioneered FSC-certified cardboard sandwich packs and is working towards FSC certification for tissue products.</p>	D
<p>Sustainable farming</p> <p>Organics/pesticides</p> <p>Showing potential: reasonably good range of organic products available (16%) with some price promotions on organic produce. Company told us of its commitment to publish its own pesticide residues testing data.</p>	C
<p>Overall comments and score</p> <p>Overall, showing potential and top scorer for sustainable fish sourcing and customer communication. Has opportunity to place more emphasis on UK seasonal produce and reduce proportion of airfreighted produce.</p>	C



Name: Morrisons	
Date of report: March 2006	
Comments	Rating
<p>Food transport</p> <p>Seasonal UK-sourced food</p> <p>Room for improvement: had highest proportion of UK-sourced seasonal veg (B rating) but this was let down by lack of signposting and promotions. Helpline was particularly unhelpful. Only company to flag up use of airfreight (for pomegranates from India and apples from the US) though company told us it minimises use.</p>	D
<p>Waste</p> <p>Reduce, reuse and recycle</p> <p>Poor: only company not to offer reusable 'bags for life'. Offered an own-brand toilet paper and kitchen roll with recycled content, but no declared recycled content in own-brand cereal packaging.</p>	E
<p>Nature</p> <p>Fish</p> <p>Poor: no MSC-labelled products found. Fresh fish counters unable to provide information on sustainably sourced products.</p>	E
<p>Trees</p> <p>Room for improvement: a quarter of wooden kitchenware FSC-certified. Company didn't tell us of any commitments to FSC sourcing.</p>	D
<p>Sustainable farming</p> <p>Organics/pesticides</p> <p>Room for improvement: restricted range of organic options in surveyed food categories (11%). Some promotion ('organic food that doesn't cost the earth') in Southeast store.</p>	D
<p>Overall comments and score</p> <p>Overall poor rating. Apart from having the highest proportion of UK seasonal veg (71%), did not shine in any other category. Only company not to offer reusable 'bags for life'. Opportunity to give greater emphasis to all environmental sustainability policies.</p>	E





Sainsbury's	
Name:	March 2006
Date of report	
Comments	Rating
<p>Food transport</p> <p>Seasonal UK-sourced food</p>	D
<p>Waste</p> <p>Reduce, reuse and recycle</p>	C
<p>Nature</p> <p>Fish</p>	B
<p>Trees</p>	C
<p>Sustainable farming</p> <p>Organics/pesticides</p>	B
<p>Overall comments and score</p>	C

Top of the big four supermarkets and showing leadership on organics/pesticides and sustainable fish sourcing. Room for improvement in sourcing and signposting UK in-season produce.

Room for improvement: 59% of in-season veg were UK-sourced, but little signposting of seasonality. No seasonality information available from helpline.

Showing potential: high recycled content in two-thirds of breakfast cereal packaging (B); two-thirds of breakfast cereal packaging (B); one toilet paper and two kitchen roll products with 100% recycled content (B). Let down by having no incentives to reduce plastic bag use other than availability of 'bags for life' (D). One store had recycling bins for plastic bags.

Good: had the widest range of MSC options (8 out of 72 products on sale) including some alternatives to popular species such as cod, but little promotion of products. Some helpful information available at fresh fish counter, and fishmonger able to point out sustainable options. Notice in Southeast store explaining skate no longer available due to sustainability concerns.

Showing potential: a quarter of wooden kitchenware FSC-certified. Company told us it is committed to sourcing increasing amounts of FSC-certified products as member of WWF Forestry Trade Network.

Good: had the highest percentage of organic options in surveyed food categories (21%) and only supermarket to have organic option for all ten products available in both stores surveyed. Policy on responsible pesticide use found on some conventional products. Company told us of its commitment to publish its own pesticide residues testing data.

Somersetfield	
Name:	March 2006
Date of report	
Comments	Rating
<p>Food transport</p> <p>Seasonal UK-sourced food</p>	C
<p>Waste</p> <p>Reduce, reuse and recycle</p>	E
<p>Nature</p> <p>Fish</p>	D
<p>Trees</p>	E
<p>Sustainable farming</p> <p>Organics/pesticides</p>	E
<p>Overall comments and score</p>	E

Has considerable potential to improve ratings, particularly on sustainable sourcing policies and waste. Sourced reasonable level of UK seasonal produce. Has opportunity to increase promotion and signposting.

Showing potential: 62% of in-season veg were UK-sourced, with several price promotions and displays for UK produce, though little emphasis on seasonality. In-store magazine feature on seasonality featured non-UK produce. Low proportion of fruit likely to have been airfreighted. Company says it minimises airfreight due to cost.

Poor: no declared recycled content on breakfast cereal packaging, and no own-brand toilet paper or kitchen roll with recycled content. Offers 'bags for life', but no other incentives for reducing plastic bag use. One store had recycling bins for plastic bags.

Room for improvement: three MSC products found but with no promotion or signposting. No fresh fish counters in either store and helpdesk unable to provide information.

Poor: no FSC-certified wooden kitchenware found in either store.

Poor: provided the least organic choice - only 4% of options were organic in surveyed food categories.





Name: Tesco		Date of report: March 2006
Comments	Rating	
Food transport Seasonal UK-sourced food	Room for improvement. 61% of in-season veg were UK-sourced, but no noticeable signposting of seasonal produce. Particularly unhelpful helpline.	D
Waste Reduce, reuse and recycle	Showing potential: half of breakfast cereal packaging had recycled content of 75%; offered one toilet paper and two kitchen rolls with recycled content. Was the only company to promote reusable 'bags for life' at checkouts, including price promotion. Kitchen roll carried statement 'This kitchen towel is made from recycled paper and therefore helps reduce the amount of waste which is land filled.' Stores had recycling bins for carrier bags.	C
Nature Fish	Room for improvement: one MSC product found out of over 150 products surveyed. No information available. Fish counter staff failed to understand questions, however much explained.	D
Nature Trees	Poor: only 5% of wooden kitchenware FSC-certified.	E
Sustainable farming Organics/pesticides	Showing potential: very large stores with reasonably good range of organic choices. 16% of options were organic in surveyed food categories.	C
Overall comments and score	Poor overall score for the UK's largest retailer. Has room to improve on all aspects, including sustainable sourcing and seasonality. Showing potential on waste and reducing carrier bag use.	D

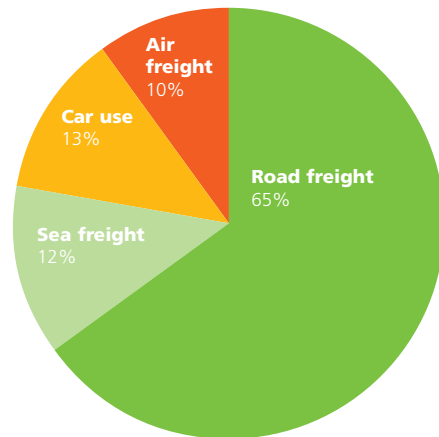


Name: Waitrose		Date of report: March 2006
Comments	Rating	
Food transport Seasonal UK-sourced food	Showing potential: 53% of in-season veg were UK-sourced, with eye-catching information on British growers. No specific seasonal signposting. No easily accessible information from helpline, but was the only company able to send a typewritten list following request. Had highest number of fruit likely to have been airfreighted, including apricots and organic strawberries and blueberries from New Zealand.	C
Waste Reduce, reuse and recycle	Showing potential: three-quarters of breakfast cereal packaging had between 75-80% recycled content. One own-brand toilet paper and kitchen roll with 100% recycled content. No incentives to reduce plastic bag use except availability of 'bags for life'.	C
Nature Fish	Good: stocked five MSC products (out of 63) and fish counter staff were the most helpful in our survey, able to offer information, including printed materials, on fish and sustainability.	B
Nature Trees	Excellent: the small range of wooden kitchenware products were all FSC-certified. Company told us its policy is to source only independently certified timber (such as FSC).	A
Sustainable farming Organics/pesticides	Good: second only to Sainsbury's. Largest proportion of organic options within surveyed products (19%). Organic options signposted with blue 'O' on shelf-tag. Range of LEAF products also available.	B
Overall comments and score	Overall, top rated retailer, with good policies on sustainable sourcing. Has potential to source and signpost higher proportion of seasonal UK produce and to reduce amount of airfreighted out-of-season produce.	B

The results



1 Food transport: reducing its impact on climate change



CO₂ emissions associated with UK food transport⁽⁵⁾

What's the issue?

Tackling climate change is perhaps our greatest challenge, yet understanding how our food choices contribute to climate change – and what we can do to reduce our impact and make more sustainable choices – is poorly understood, and not on most consumers' radar. In putting our 'climate change' indicator first in this report we have chosen to start with the most challenging in terms of consumer awareness. However, if we are going to better engage consumers in addressing climate change we need to find ways to make connections between everyday choices and environmental impacts.

So what does climate change have to do with the food in our shopping trolleys? Food is the average household's number one contributor to climate change – responsible for nearly a third of our climate impact⁽²⁾. Our food choices are fundamentally important, not just to our health, but to the well-being of the planet.

Energy used in food production, processing and transport all contribute significantly to CO₂ emissions – as do supermarkets themselves. Britain's biggest supermarket chain (Tesco) is one of the greatest energy users in the country⁽³⁾.

We have chosen to look at one aspect of climate change impact: food transportation.

Food is now transported further than ever before – both in the UK and around the world. From 1980 to 2000 the amount of food we import trebled, and food is sourced from around the world in any season. But the greater choice and variety that this gives us comes with a downside. Transport emissions from 'food miles' provide a significant and growing contribution to global warming⁽⁴⁾. Road freight accounts for the majority (65 per cent) of CO₂ emissions and contribute to increased congestion, noise, accidents and deterioration of air quality. 'Food miles' from

Consumers and seasonality

There is growing consumer demand for more seasonal and local food. Two-thirds of consumers say they are trying to buy more seasonally, according to Institute of Grocery Distribution (IGD) research⁽⁸⁾, with three-quarters either already purchasing local food, or interested in doing so⁽⁹⁾. Seasonal food can offer better taste and be more affordable, while local food can deliver freshness, reduce food miles, offer benefits to local farmers and communities and help reconnect consumers with where their food comes from.

But consumers are also confused about seasonality and the sourcing of food. In a recent survey⁽¹⁰⁾, one in five people thought oranges could be grown in the UK and less than a quarter of young people knew apples were picked in the autumn.

airfreight have the highest relative greenhouse gas emissions. These account for about one per cent of food miles, but ten per cent of food transport CO₂ emissions⁽⁵⁾. By our calculations, the CO₂ contribution from air-freighting just one small 225g punnet of New Zealand strawberries is equivalent to the CO₂ emissions from eleven school runs in the car.⁽⁶⁾

According to the Food and Climate Research Network, the best possible consumer response is to opt for more in-season UK produce, which cuts out the bulk of the greenhouse gas emissions associated with long-distance food transport⁽⁷⁾.

We wanted to find out what retailers are doing to reduce the impact of food transport and to support more UK seasonal produce. We also looked to see how they are communicating this to their customers to help them understand where food comes from and how it has been transported.

What we did

Seasonality

To assess the extent to which supermarkets offer in-season UK-sourced produce, we chose ten vegetables that were in season and could reasonably be expected to be of UK origin at the time of the survey. This took place during March, a month when a variety of seasonal vegetables are on offer.

Our ten were:

- ▷ purple sprouting broccoli
- ▷ cabbage
- ▷ carrots
- ▷ cauliflower
- ▷ leeks
- ▷ parsnips
- ▷ radishes
- ▷ spinach
- ▷ swede
- ▷ watercress.

We looked for availability of fresh vegetables, not frozen or tinned. For each, we recorded how many types of were available and the declared country of origin. We looked to see whether these vegetables were specially promoted – for example, by being prominently displayed, or with a special offer or price promotion. And we looked to see whether the supermarket promoted the seasonality aspect of the product in any way, such as through posters or recipe cards.

In addition, we conducted a ‘mystery shopper’ survey of supermarket’s telephone helplines – asking if they could provide any information on seasonal fruit or vegetables.

We rated companies on:

- ▶ the percentage of UK seasonal produce within our 10 in-season categories*;
- ▶ our judgement of their promotion of in-season vegetables*;
- ▶ the results of our telephone helpline survey.

* averaged across the two stores surveyed

We gave equal weight to each of these aspects to reach our overall seasonality rating.

Transportation

Our surveyors recorded the declared country of origin for all fresh fruit in the supermarkets surveyed to enable us to assess the proportion sourced from outside the EU for each of the retailers. We also wanted to see whether we could assess how much is airfreighted – as airfreight is the most environmentally damaging form of transportation.

Our assessment of whether fruit was likely to have been airfreighted used 2005 import data collected by Customs and Excise⁽¹¹⁾. This records the percentage of a fruit from a specific country that is airfreighted.

In some cases this is 100 per cent, as with Mexican blackberries and raspberries. But, for others, some is airfreighted and some transported by surface freight. For example, in 2005, two-thirds of blueberries from Chile were airfreighted. And, while 100 per cent of peaches were airfreighted from Australia, only 77 per cent of nectarines were. We also understand that supermarkets and their suppliers ‘top up’ their supplies of produce, if necessary, by airfreighting produce – even for products that are rarely airfreighted.

Our definition of fruit ‘likely to have been airfreighted’ is where more than 50 per cent is imported by air according to Customs and Excise figures.

We provide some qualitative findings, but do not rate the supermarkets as we were unable to determine from our survey whether the produce had been airfreighted.

What we found

- We found the term ‘seasonal’ used to describe in-season produce, but also found it referring to hot-house aubergines, pineapples, and even chocolate.
- Morrisons (71 per cent) and Asda (69 per cent) had the highest proportion of UK-sourced, in-season vegetables, and Waitrose the least (53 per cent).
- This leaves a significant proportion of vegetables being imported that could be sourced in the UK.
- The majority of our ten seasonal vegetables were sourced either from the UK or within Europe, but we also found:
 - Kenyan leeks (Morrisons, Sainsbury’s and Somerfield);
 - South African carrots (Morrisons and Waitrose), cabbage (Sainsbury’s) and leeks (Waitrose);
 - US watercress (Sainsbury’s and Tesco);
 - Egyptian carrots (Tesco); and
 - Moroccan radishes (Waitrose).
- None of the supermarkets were prominently signposting the seasonality of UK produce. In all stores we found some promotions and signposting for UK-sourced vegetables. Asda was doing the most to highlight and promote British vegetables, with price promotions, signs and recipe hints – though with limited reference to seasonality.
- None of the supermarkets were able to easily provide lists or any information about what produce

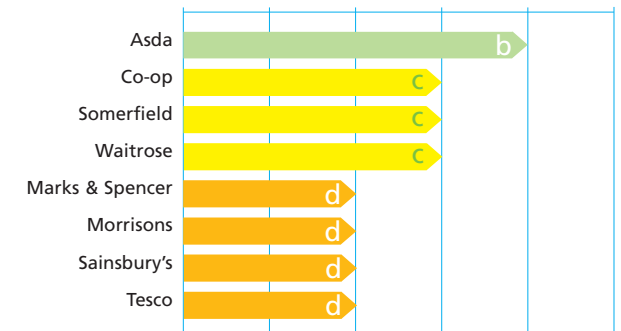
was in season in our telephone helpline survey. However, Waitrose was able to provide our surveyor with a hand-typed list.

- Most surveyed produce carried a ‘country of origin’ label, but some did not – particularly unpackaged produce. Sometimes our researchers only found origin information by closely examining the crates in which the fruit was displayed.
- Morrisons had the highest proportion of ‘long distance’ fruit with 71 per cent of its fruit imported from outside the EU. Co-op (57 per cent), and Asda (60 per cent) had the least.
- We found it impossible for shoppers to tell how produce is transported – for example, whether it has been airfreighted. Morrisons was the only supermarket to mention the means of food transport. Two products (pomegranates from India and apples from the USA) indicated on a shelf label that the fruit had

been air-freighted, though it was not clear why only these two products had been selected.

- Waitrose and M&S had the largest percentages of fruit likely to have been airfreighted (22 per cent and 18 per cent). Waitrose had the highest number of fruits likely to have been airfreighted (18), including apricots and organic strawberries and blueberries from New Zealand. For M&S, this included Egyptian peaches, Mexican raspberries and blackberries, and Australian nectarines.

Retailer ratings for seasonality



What the companies told us

All of the supermarkets in our survey were keen to assure us of their commitment to sourcing British produce. Both Asda and Sainsbury's told us that 90 per cent of what can be sourced in the UK is sourced here. Many also told us of ways in which they were working to encourage and support more locally and regionally sourced foods (particularly Asda, M&S, Morrisons, Sainsbury's and Waitrose). But Waitrose was the only company to share its definition of local (sourced within 30 miles of the store). Although we found very little evidence of this in-store in March, most retailers told us that they highlight and promote 'in-season' produce.

All supermarkets told us they are reducing CO₂ and energy use through transportation, by improving road haulage efficiency. Some also told us of moves towards 'greener' fuels or transport, including rail.

Generally, companies did not tell us much about their policies on airfreighting food. However, some (Co-op, M&S Somerfield, Sainsbury's and Waitrose) told us they minimise its use or are working to reduce the CO₂ impact of international sourcing. None told us they had specific targets on airfreighting.

Morrisons told us that airfreighting 'only occurs in exceptional circumstances, where there is no other viable or practical alternative or source of the product, and due to the perishable nature of the product involved'. However, we found this at odds with their shelf promotion of airfreighted US apples.



2 Waste: action to reduce, reuse and recycle



What's the issue?

Waste, and particularly packaging, rates highly on consumers' environmental concerns. The Women's Institute, for example, has made packaging waste one of its main campaigns, focusing particularly on supermarkets and grocery packaging⁽¹²⁾.

The food industry is a major user of packaging. Much of the 30 million tonnes of household waste going to landfill each year originates from what we buy at supermarkets.

Waste in landfill emits gases, including the powerful greenhouse gases methane and carbon dioxide, as well as toxic chemicals. New sites, which are needed for both incineration facilities and landfill, are becoming increasingly scarce, particularly in the Southeast.

Waste that is not reused or recycled is a missed opportunity to reduce the use of virgin resources. For example, the production of

aluminium cans from recycled cans requires just five per cent of the energy required to manufacture the cans from raw material and significantly reduces pollutants⁽¹³⁾.

Plastic carrier bags account for 3.5 to 5.3 per cent of the total plastic packaging used in the UK⁽¹⁴⁾. They are a highly visible form of waste, which, if they do not end up overflowing from our kitchen cupboards, can end up in landfill sites or as unsightly litter. It is estimated that each year we carry home between eight to ten billion plastic bags weighing 80,000 tonnes⁽¹⁵⁾. That's a staggering 400 bags a year for every household. A typical plastic bag is used an average of 30 minutes but won't biodegrade for 400 years⁽¹⁶⁾.

Other countries, such as Ireland (with its plastic bag tax), have introduced incentives to reduce use and Scotland is considering the same. Carrefour, Europe's largest retailer, has stopped giving away free carrier bags.

Supermarkets can do more to reduce, reuse and recycle their own waste and to reduce the waste burden they impose on consumers. They are also in a unique position to influence consumer behaviour through: product and packaging design; consumer communication and incentives that reduce carrier bag use; and store-based activity, including waste recycling collection points.

What we did

We set out to see how well supermarkets help customers to ‘close the loop’ on waste, through products and packaging with recycled content and promotion of ‘reduce, reuse and recycle’.

We have rated supermarkets on:

- ▶ the extent to which own-label breakfast cereal packaging has a declared recycled content;
- ▶ number of own-brand toilet paper and kitchen roll products that we found with a declared recycled content; and
- ▶ whether supermarkets were offering incentives to customers to reduce their use of single use carrier bags.

We have given equal weight to these three elements in reaching our overall ‘waste’ rating.

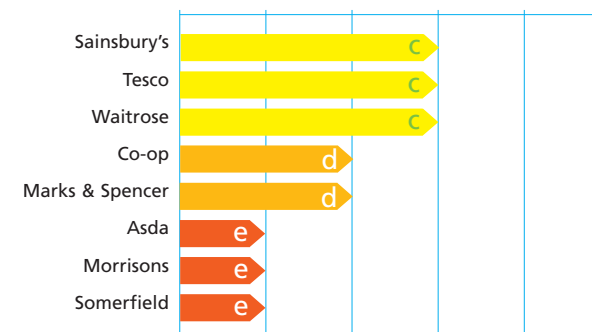
We also looked at, but did not include in our ratings, information or activities to communicate reuse or

recycling to customers, and the provision and promotion of recycling facilities in-store and on-site.

What we found

- No supermarket scored well for any of our ‘waste’ indicators, though we found Sainsbury’s, Tesco and Waitrose taking a lead compared to other retailers.
- We found that some or all of the own-brand breakfast cereal packaging from M&S, Sainsbury’s, Tesco and Waitrose included a significant recycled content.
- All retailers offered one own-brand toilet paper and kitchen roll with a declared 100 per cent recycled content, except Asda, M&S and Somerfield (toilet paper) and M&S and Somerfield (kitchen roll). Only the Co-op (for toilet paper) and Sainsbury’s and Tesco (for kitchen roll) offered more than one own-brand recycled product.

Retailer ratings for waste



- The limited range of recycled toilet paper and kitchen roll products tended to be ‘niche’ rather than mainstream products. But Asda told us that its own-brand ‘Shades’ toilet paper (which the company says is the highest-selling toilet paper in the UK) has a 40 per cent recycled content. This information is not communicated to customers on its labelling.

Carrier bags

- None of the supermarkets rewarded customers for bringing their own bags and none provided disincentives for using plastic bags, such as charging for them.
- All of the supermarkets (except Morrisons) offered a ‘bag for life’ or a ‘strong bag’ for a charge (ranging in cost from 10p to 50p).

- Tesco was the only supermarket to promote these, offering a price discount (5p rather than 10p) and advertising them at most checkouts, encouraging customers to ‘save the planet’.

Reuse and recycling

- We found that none of the stores were promoting the value of reuse or recycling to customers through posters, leaflets or other information in-store.
- None of the litter bins in-store were divided to allow customers to separate out different materials, such as glass, cans and plastic bottles. Both of the Tesco stores and one of the Sainsbury’s and Somerfield stores had bins for recycling carrier bags.
- Researchers often reported on unattractive recycling facilities in car-parks, poorly signposted and in out-of-the-way locations,

surrounded by litter. It was not always clear whether these were the responsibility of the supermarket, the local authority or charities.

Customer information

- Waitrose, Co-op, Sainsbury’s and Tesco were notable in that some of their own-brand recycled products carried more detailed customer information:
 - Waitrose has been awarded the European ‘Eco Label’ for its recycled toilet paper and kitchen roll, and described its principles on the back.
 - Co-op has won the Green Apple Award for directing its waste office paper into making recycled paper products. This was described in detail on the back of recycled product packaging.

- Sainsbury’s ‘Revive’ products explained that use of 100 per cent recycled paper helps ‘to make a more effective use of natural resources’.
- Tesco included the following on the packaging of its recycled kitchen towels: ‘This kitchen towel is made from recycled paper and therefore helps reduce the amount of waste which is land-filled’.

What the companies told us

All companies told us of their commitment to reducing waste, avoiding excess packaging and supporting recycling. Tesco told us it wants to be first for recycling and double the amount customers bring to stores to recycle. It intends to introduce automated front-of-store recycling machines that sort plastic, metal and glass. Asda says it supports the ‘Big Recycle’ initiative to promote the environmental benefits

of recycling to customers ('Asda making recycling easy').

Sainsbury's and Waitrose told us they clearly signpost recycling options on packaging. Sainsbury's says it is the first UK retailer to label 'sorry – not recyclable'.

Three companies told us of specific targets to reduce the use of carrier bags:

- Asda is piloting a single-bag dispenser system to reduce the use of carrier bags by 40 per cent;
- Tesco aims to reduce its use of carrier bags by 25 per cent (one million fewer bags) by 2008 and has introduced a clubcard incentive scheme to reward customers for reusing bags; and
- Sainsbury's has a target to reduce carrier bag use by five per cent.

Others, including M&S and Morrisons, are currently trialling reuse initiatives.

Sainsbury's, Somerfield and Tesco have recycling facilities for carrier bags. Asda and Morrisons say they are introducing these into stores. Last year, Sainsbury's says it collected 100 million bags.

Some companies (Co-op, Somerfield, Tesco) told us their bags are made from degradable plastic. Co-op and M&S told us they are already using or trialling compostable packaging and bags made from starch.

All companies told us they provided reusable bags, including 'bags for life'. Sainsbury's and Waitrose each told us that the 'bags for life' they sell avoid the unnecessary use of over 50 million conventional carrier bags a year.

Closing the loop

- ▶ Asda, M&S and Co-op have participated in 'Closing the Loop' projects to turn supermarket waste into products and packaging. For example, all waste paper from the companies' offices is recycled into toilet paper.
- ▶ Asda told us that its own-brand 'Shades' toilet paper, which is the highest selling toilet paper in the UK, has a 40 per cent recycled content.
- ▶ Co-op told us that paper from its offices is recycled into 100 per cent recycled toilet paper and kitchen towels – accounting for 890 tonnes of post-consumer waste annually.
- ▶ M&S has also developed single-use drinks bottles, with 30 per cent recycled content declared on the label of smoothies and some fruit juices.

3 Nature: supporting sustainable sourcing



What's the issue?

The increasing global demand for farmland results in the loss of millions of acres of forest and other valuable habitats as land is cleared to rear livestock and grow crops. Palm oil and soya are two crops that are currently under the spotlight for causing rainforest loss. This demand, combined with the demand for forest products – including paper – has resulted in the loss of nearly half of the world's original forests⁽¹⁷⁾. The loss of forests results in threats to nature (biodiversity) and to vital ecological processes, such as carbon sequestration and water storage.

The story for seafood is similar: over-fishing, indiscriminate fishing techniques, capture of young and breeding fish, and the destruction of ecosystems have left over three-quarters of the world's commercial fish species either fully or over-exploited or fully depleted⁽¹⁸⁾. Worldwide, up to 90 per cent of

stocks of large, predatory fish have already been lost, including cod, tuna, halibut and swordfish.

Supermarkets can ensure that they responsibly source products to reduce impacts on ecosystems. Over 90 per cent of the seafood bought in the UK is through supermarkets⁽¹⁹⁾.

They are also in a position to communicate their policies to customers and help raise awareness. The Marine Stewardship Council (MSC) for fish⁽²⁰⁾, and the Forestry Stewardship Council (FSC) for wood and paper products⁽²¹⁾, certify 'sustainable' sources and licence their logo for use on sustainably sourced products.

We rated companies on:

- ▷ Fish: information to consumers; support for sustainably sourced fish, including that certified by the Marine Stewardship Council (MSC).
- ▷ Trees: availability of wooden kitchenware, toilet paper and kitchen towels with Forestry Stewardship Council (FSC) certification.

What we did

We have explored two areas – supermarkets' support for sustainably-sourced fish and for sustainable forests – to rate how well they help customers make more sustainable choices.

For fish, our researchers trawled the fresh fish counter, frozen food aisles and chilled ready meal displays in search of the availability, promotion and explanation of sustainably sourced fish, including MSC-certified

fish and fish products. They also noted what information was available to customers, including the origin of the fish on sale. This included asking questions about fish sustainability at the fresh fish counter or helpdesk. We asked: 'How can I tell if any of these fish are sustainable?' If staff did not understand the question, this was followed by an explanation. We then asked whether they had any leaflets or other information.

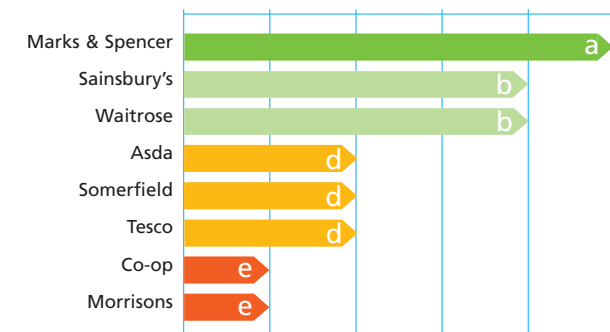
We have rated supermarkets using our judgement of the information they provided (including at the fresh fish counter) and on their commitment to sourcing from sustainable stocks, including availability of products with the MSC logo.

We also looked at whether supermarkets were selling at-risk species, but have not rated supermarkets on this element as we were not able to determine accurately from our survey the source and method of capture of potentially at-risk species.

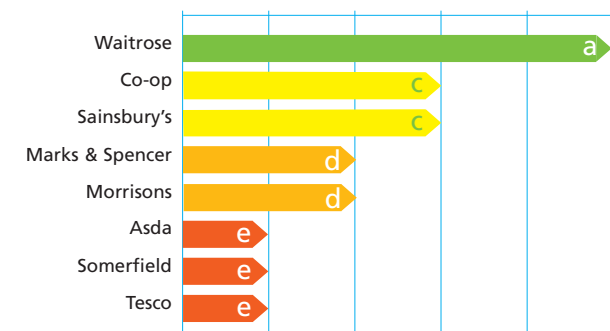
In consultation with Greenpeace, we included Dover sole, marlin, monkfish, shark (dogfish), skate and swordfish in our list. We also wanted to look at more popular consumer choices – cod, haddock and wild salmon – but we were not generally able to distinguish between those from sustainable and unsustainable sources.

Our trees indicator is designed to gauge supermarkets support for sustainable forests. We looked for availability and promotion of FSC-certified wooden kitchenware, such as wooden spoons, chopping boards, salad bowls and mug trees, and calculated the percentage that were FSC-certified. We recognise that these are a small part of supermarket sales, but they are likely to be indicative of overall company policy. We also looked for declared FSC-certified content in products such as toilet paper and kitchen rolls and gave an additional score for where we found this.

Retailer ratings for fish



Retailer ratings for wood



What we found

Fish

- It is currently very difficult for most shoppers to be confident in choosing sustainable fish. With some exceptions, we found little consumer information and a limited range of MSC-certified, 'sustainably sourced' products.
- M&S led the way. It was the only retailer to draw customers' attention to the issue. M&S policy is prominent on packaging and in-store with posters and leaflets: 'All M&S products, including our sandwiches and ready meals, only contain fish from well-managed stocks'. M&S has no fresh fish counters, but staff were helpful and able to point to useful information on the back of packs, and, for company policies, the M&S website. Greenpeace and the MSC both rate M&S as the top UK retailer for responsible fishing.
- Sainsbury's and Waitrose are also making good progress. Sainsbury's had the widest range of MSC options available (still just eight out of 72 fish products), including some alternatives to popular species such as cod. But we found little promotion of products and no additional information available – though the fresh fish counter in the Southeast Sainsbury's did have a notice explaining that skate was no longer available due to sustainability concerns. Waitrose stocked five MSC products (out of 63). Waitrose fish counter staff were the most knowledgeable in our survey, being able to offer information on fish and sustainability and having printed materials to back it up.
- We found very few MSC-certified products across the whole survey – eight in Sainsbury's, five in Waitrose, three in Somerfield, two in Asda and one in Tesco. Around 150 fish products were surveyed in Tesco alone. We found MSC-certified Pacific and Alaskan salmon, hake, and Alaskan pollock. All carried the MSC logo and wording: 'This product comes from a fishery which has been certified to the Marine Stewardship Council standard for a well-managed and sustainable fishery.' In none of these stores did we find any additional material to explain the significance of the logo or draw a new customer's attention to its benefits, nor were products on special promotion.
- We expected specialist information and advice at the fresh fish counter. But no retailer was able to provide good information in both of the stores surveyed. Staff at Waitrose, Sainsbury's and M&S were able to provide helpful information in one of the stores surveyed. In general, fish counter and other staff appeared insufficiently trained and few understood the question, even when explained.
- Origin information was generally given on fresh and frozen fish, but less consistently on fish used in ready meals. Where information was provided, it was usually without any indication as to the meaning or significance of the statement. For example, most fish was described as coming from a particular area, such as from the Northeast Atlantic, but there was rarely information as to the method of catch or whether the stocks in that area were sustainably managed.
- We found some potentially at-risk species on sale, including marlin, swordfish, monkfish, skate and Dover sole. Less surprisingly, we also found cod, haddock and salmon in all stores. However, we did find some retailers introducing customers to hoki and pollock as white fish alternatives, and a few MSC-certified salmon products were available in several stores.

Trees

- All retailers, except Asda, M&S and Somerfield, carried some FSC-certified wooden products.
- Though we only found a small range of wooden kitchenware in Waitrose (six different products in total), all were FSC-certified. The John Lewis Partnership – which includes Waitrose – has been recognised for its sustainable forestry policy and practice.
- We found Co-op (32 per cent), Morrisons (24 per cent) and Sainsbury's (24 per cent) showing potential.
- Lagging behind were Tesco (five per cent), Asda (0 per cent), M&S (0 per cent) and Somerfield (0 per cent).
- We also found support for FSC on:
 - Co-op quilted bathroom tissue
 - Sainsbury's own-brand 'Ultra Wipes'
 - M&S sandwich packs.

What the companies told us

Fish

It is clear that sustainable seafood sourcing is a work in progress for all the retailers.

All told us that they are committed to sourcing from well-managed fisheries and most expressed their commitment to working with the MSC. All told us that they had, or were in the process of, delisting various at-risk species. Many told us they are developing new policies. For example, Asda – which has been the focus of Greenpeace campaigning – has announced the ambitious target that within the next three to five years it will only stock wild-caught fresh and frozen fish from fisheries that meet MSC standards.

Sainsbury's originally committed to aiming for 100 per cent MSC-certified fish by 2010, but has recently reconsidered its policy due to slower than anticipated progress

of MSC certification. However, it still aims to source all fish from sustainable sources (no target date shared with us). The company intends to remove all 'red-rated' at-risk species by the end of 2006.

Trees

All companies told us they were committed to the responsible sourcing of forest products. The Co-op, M&S and Sainsbury's told us they were members of WWF Forestry Trade Network, which commits them to sourcing increasing amounts of FSC-certified products.

Asda told us that their own-brand toilet tissue, 'Shades', has 60 per cent FSC-certified content, but Asda chooses not to label its product with this customer information.

M&S told us that they have the first FSC-certified cardboard packs in the UK, used on all 80 million packs of cut sandwiches sold by M&S, and

which replace plastic packaging. They are working towards FSC certification for tissue paper products.

Waitrose told us that its own-brand tissue and toilet paper is either FSC-certified paper, 100 per cent recycled, or has achieved the EU Ecolabel standard.

4 Sustainable farming

What is the issue?

Modern intensive farming has been criticised for its impact on the environment. Farmland wildlife has experienced serious decline, soil quality has deteriorated and agriculture is now the second largest polluter of water in the country⁽²²⁾. It has been calculated that a switch to organic production could save £1.13bn per year in negative environmental impacts⁽²³⁾.

There is a growing market for food produced to higher environmental standards, including organic. The environmental benefits of organic agriculture include higher levels of biodiversity, lower environmental pollution from pesticides and less waste. Lower use of energy also contributes to reductions in CO₂ emissions⁽²⁴⁾.

Many consumers are concerned about the effects of pesticides on the environment and human health. Some pesticides are of special concern due to their propensity to persist (that is, to not break down in the environment into less harmful chemicals) and to accumulate through the food chain. This can have adverse effects on wildlife and biodiversity, and on food production workers, their families and the environment. Supermarkets can help minimise our, and the environment's, exposure to potentially harmful or risky chemicals.

To rate supermarkets on how well they help customers to choose products that have less environmental impact, we have examined two areas: provision of produce from organic and other low-input farming systems (such as LEAF⁽²⁵⁾); and practices on communicating pesticide reduction strategies.

What we did

We looked for the availability of organic options for the following ten selected products:

- ▷ Apples
- ▷ Bananas
- ▷ Bread
- ▷ Celery
- ▷ Cocoa/hot chocolate
- ▷ Lettuce (whole)
- ▷ Oranges
- ▷ Pears
- ▷ Potatoes
- ▷ Tea.

We selected these products in consultation with the Pesticides Action Network (PAN) UK⁽²⁶⁾. All have been associated with pesticide concerns in agricultural use, including pollution, bio-accumulation and adverse effects on wildlife. Our list also includes commonly-bought products that are associated with pesticide problems in developing countries – bananas,

coffee, tea and chocolate – foods that are regularly bought by UK consumers.

PAN UK advised that encouragement for consumers to favour organic or other 'low chemical' options in these food categories would help to reduce specific pesticide risks, both for farmers and the environment.

We also looked for in-store customer information about pesticide policies or organic produce. We rated companies on the percentage of surveyed products that were organic (with a target of 25 per cent) and also gave additional points for LEAF options and customer information (including pesticide policies) on conventional produce.

What we found

- Sainsbury's and Waitrose are taking a lead. Sainsbury's had the highest percentage of organic products in our categories (21 per cent). It was the only supermarket to have one for all ten products, available in both stores surveyed. We also found customer information on responsible pesticide use on some non-organic products. Waitrose had 19 per cent organic products and a good range of well promoted LEAF-certified produce.
- M&S and Tesco had a reasonably good range (16 per cent). Somerfield provided the least organic choice (four per cent).
- We found a range of LEAF-labelled produce in Waitrose and, to a lesser extent, in Asda and the Co-op.
- Overall, there were very few price promotions on organic products compared to conventional products.
- Co-op declared its pesticide policy on packs and posters; M&S had

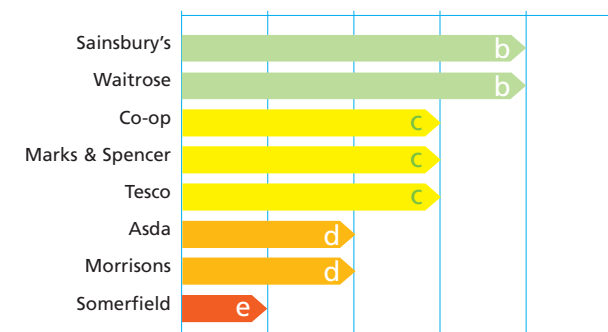
in-store posters explaining its pesticide reduction policy.

- Generally, there was little explanation of organic or LEAF principles in-store, although the Southeast Asda store carried signs explaining basic organic principles.

What the companies told us

- All supermarkets said they were committed to reducing pesticide residues and some (Co-op, M&S, Sainsbury's and Tesco) that they have banned suspect chemicals.
- Co-op, M&S and Sainsbury's said they are committed to publishing their residue testing data.
- Sainsbury's told us it is the leading organic supermarket; and Asda, that it is trebling its range of organic food this year.
- M&S told us of its support for LEAF. Waitrose says it is the only retailer to insist all its British growers adopt it.

Retailer ratings for organics and pesticides



Appendix Summary of retailers' company policies

Asda

Overall policy/targets

Asda's main environmental objectives are:

- to reduce its energy consumption and greenhouse gas emissions
- zero waste to landfill by 2010
- absolute reductions in packaging weight by end of March 2010.

1. Climate change

Seasonality

- Asda aims to buy UK produce subject to availability, quality and food safety; ninety per cent of what can be sourced in the UK, is. Asda was the first UK supermarket to stop importing carrots, through extending the growing season.
- Asda sells over 1,500 products from over 300 small and micro UK-based producers who supply to eight 'food hubs' around the country.
- Asda magazine runs monthly *In Season* features, recipes and stories on local producers.

Transport

Asda is working to reduce its CO₂ emissions. Its distribution lorries – among the most fuel-efficient on UK roads – are being converted to run on a bio-diesel mix, which will reduce emissions by three per cent. Use of rail freight has reduced road miles by five per cent (4.5

million miles) since 2003. A projected deep sea port in Teeside will further reduce road miles by 1.5 million. Asda's delivery trucks collect from suppliers on their return journeys, saving 0.5 million miles.

Energy

Asda intends to operate 2MW wind turbines on all its distribution centres by the end of 2007, as part of a drive to reduce its carbon emissions by 80,000 tonnes (from a 2001 baseline, as part of the UK Emissions Trading Scheme) – and is working towards 100 per cent renewable energy. Asda's 'Carbon Club' helps to identify opportunities for energy efficiency in its supply chain.

2. Waste

Packaging

Asda's policy limits the weight and volume of packaging to the minimum necessary for safety, hygiene and quality.

Asda is signed up to the 'Courtauld Commitment', working with the government's Waste Resources Action Programme (WRAP) to:

- design out excess packaging waste by the end of March 2008
- deliver absolute reductions in packaging weight by end of March 2010
- tackle the amount that food consumers throw away by the end of March 2010.

Carrier bags

Asda's pilot single-bag dispenser aims to reduce carrier bag use by 40 per cent. Asda plans to introduce carrier bag recycling facilities nationwide by the end of 2006, and has reduced its reusable 'Bag for Life' from 10p to 5p.

Recycling

Asda opened four new recycling facilities this year. In 2005, Asda recycled 140,000 metric tonnes of cardboard, 500 metric tonnes of plastic packaging and 1.8m litres of vegetable oil, from back of store.

Asda has supported the Big Recycle initiative, promoting domestic recycling with the strapline 'Asda making recycling easy'.

Most stores have facilities for recycling glass, aluminum, steel and plastic, newspapers and magazines, textiles and shoes. Every store has recycling facilities for mobile phones and printer cartridges.

3. Nature

Sustainable fish

Asda no longer sells 'at risk' species: swordfish, shark, skate wings, ling, huss (dog fish) and Dover Sole. It aims within the next 3-5 years to source its wild-caught fish only from MSC-certified fisheries. Asda is working to develop 'best practice' in the fish catching and farming sectors. It is calling for the North Sea to be declared a marine conservation zone.

All its fresh fish counters promote sustainably-sourced 'Catch of the Day' fish. By September 2006, Asda aims to provide detailed labelling information on fish, including the nation of capture, rather than fisheries zone.

Trees

All Asda's hardwood garden furniture is FSC-certified. Asda's own brand 'Shades' toilet tissue (the UK best-seller) has 60 per cent FSC-certified, and 40 per cent recycled, content. This year Asda joined the roundtable on sustainable palm oil.

4. Sustainable farming

Organics/pesticides

Asda supports the development of industry-wide standards and practices, such as organic standards and sustainable packaging. It will treble its range of organic food this year.

Asda supports integrated crop management (ICM) techniques to reduce use of chemical pesticide use. Asda's 'pesticide reduction schemes' aim to reduce residues, and its suppliers work to (LOD) limit of detection levels (0.01mg/kg) rather than maximum residue limits (MRLs).

Asda advocates schemes to reduce, and set targets to eliminate, use of the more hazardous chemicals such as carbendazim, lindane, chlorpyrifos, aldicarb and vinclozolin.

Co-op

Overall policy/targets

Co-op aims to reduce its environmental impact. The company's key performance indicators include energy use, CO₂ emissions, waste and reuse/recycling, and it reports on these annually.

Co-op updated its 'Responsible Retailing' manifesto in 2004 following its biggest-ever survey into consumers' ethical concerns, including environment and sustainability.

1. Climate change

Seasonality

Co-op promotes seasonal fruits with 'new season' and 'best in season' labels, with a strong emphasis on UK products.

Transport

Co-op is developing a programme to reduce its transport impacts and CO₂ emissions. Only a minority of its products are airfreighted, and only where there is no alternative – such as perishable exotic produce.

Solar panels are fitted to roofs of about 50 Co-op trailers to provide energy for trailer batteries (mainly used to power lifting decks).

Energy

In November 2004, Co-operative Group announced its aim to power all its mainland UK sites completely by windfarm or hydropower. This will make the Co-op one of the UK's largest users of green energy.

2. Waste

Packaging

Co-op avoids packaging materials which hamper recycling. It is working with WRAP (as above) to eliminate unnecessary packaging.

Carrier bags

In 2002, Co-op introduced Britain's first degradable plastic carrier bag. Its sliced bread and fresh produce now also use degradable bags. Co-op aims to move towards compostable starch-based plastic, and already uses this technology for its organic produce packaging.

One Co-op replaceable 'Bag for Life' can save up to 35 carrier bags.

Recycling

Co-op recycles paper, glass, aluminium/steel cans and plastics from its stores, depots and offices.

Co-op's own-brand toilet paper and kitchen towels are recycled from waste paper from its offices – 890 tonnes a year. This scheme has received the Green Apple award for Environmental Best Practice.

Co-op uses recycled packaging materials for own brand goods wherever possible – such as recycled board for tissue cartons and washing powder cartons.

Larger stores provide recycling facilities for glass, paper and cans – with plastic being

introduced. Every store has recycling facilities for mobile phones and ink jet cartridges.

Co-op packaging is labelled with its constituent materials to aid recycling, and its website can help customers to locate nearest recycling facilities (where space permits).

3. Nature

Sustainable fish

Co-op aims to source its fish in line with Marine Stewardship Council, and actively avoids vulnerable species. Co-op does not purchase fish where the origin or method of catch is unknown, and does not knowingly purchase 'blackfish' – caught over-quota.

Co-op is one of only two national retailers requiring all farmed fish to be humanely stunned prior to slaughter. Its farmed prawns are sourced from well-established farms in Indonesia and Ecuador. Farms in areas of mangrove forest depletion are not used.

Trees

Co-op has a long-term aim to source all forest products from well-managed forests that have been certified to credible certification standards.

Current FSC-certified products include kitchen woodware, BBQ charcoal and some paper products, including own-brand quilted bathroom tissue and stationery (upcoming). Co-op reviews all wood products annually as a member of the WWF Forestry Trade Network.

All Co-op brand kitchenware is FSC-certified, and cutting boards are made from old trees from rubber plantations.

4. Sustainable farming

Organics/pesticides

Co-op has banned some pesticides and tightened controls on others, and reports transparently on its pesticide residue testing.

Co-op works with farmers worldwide to improve chemical controls, use more benign chemicals, and reduce reliance on chemicals. In the UK this focuses on potatoes, carrots, onions, mushrooms and cauliflowers, and overseas on coffee, pineapples, bananas, exotic fruit and vegetables. There are plans to focus also on cereals, cocoa and high risk crops (lettuce, citrus, top and soft fruit).

Marks & Spencer

Overall policy/targets

Sustainable food production and consumption are central to M&S future strategy. M&S aspires to lead in understanding retail impacts on climate change and to develop strategies. M&S is the only major retailer to publish an independent annual Corporate Social Responsibility report. M&S 'Look Behind the Label' campaign features sustainable fishing, packaging, fairtrade and animal welfare.

1. Climate change

Seasonality

M&S 'Seasons Finest' labelling promotes British produce – such as new potatoes, asparagus, tomatoes, strawberries, raspberries, apples. Seasonal fish – Cornish sardines and line-caught mackerel, Torbay sole, Scottish lobster – are highlighted.

M&S 'buy British' strategy aims to increase consumer understanding of seasonal production. All fresh chicken, turkey, duck, eggs, salmon, beef and carrots, and 65 per cent of apples and pears, are British.

M&S has regional supply chains in Ireland, Wales, Scotland and Cornwall (mainly dairy and bread). M&S sell limited quantities of local produce at certain times of the year. A future toolkit will help small suppliers to do business with M&S cost-effectively.

Transport

M&S aims to develop key performance indicators and to reduce carbon impact from its international food sourcing. None of its top 30 food raw materials – over two-thirds of food sold – are airfreighted. It has reduced imports and airfreight in some areas – for example, by extending UK growing seasons.

M&S has pioneered the hub and spoke transport distribution system utilising local depots. It was the first food retailer to use returnable plastic trays: seventy per cent of M&S foods are carried in returnable trays, the highest percentage in the UK.

Through increased vehicle capacity and fuel efficiency, more efficient delivery scheduling and driver training, M&S has cut road fuel use by 26 per cent over three years while increasing the number of stores by 44 per cent.

Energy

M&S stores use five per cent less energy, emitting nine per cent less CO₂, than in 2002/3 – despite selling more food in 44 per cent more stores. This is equivalent to 14 per cent less CO₂ emission per retail square foot, and M&S aims to reach a 30 per cent reduction.

M&S won the 2005 Sunday Telegraph/Carbon Trust Energy Efficiency Innovation Award for its system to remotely monitor and adjust store refrigeration. Since April 2006 all its stores in England and Wales use greener energy sources for both heating and

electricity. M&S aims to use 50 per cent renewable energy in its stores by 2010.

2. Waste

Packaging

M&S aims for all packaging to be recyclable or made from renewable materials and, where this is not possible, to minimise waste. M&S has signed the government's 'Courtauld Commitment' on reducing waste.

Thirty to fifty per cent of plastic in M&S smoothie bottles and salad bowls is recycled. M&S is introducing degradable cornstarch-based plastic punnets and clear sandwich pack films. M&S won the Best Retail Recycling Initiative in the 2005 National Recycling Awards and the 2005 Institute of Grocery Distribution (IGD)/Tetra Pak Environmental Award. M&S is working with WRAP to reduce the amount of packaging on ready meals.

Carrier bags

M&S offers a range of alternatives to carrier bags – for example, 2.5 million 15p reusable bags in the last year, and woven 'shoppers' for repeated reuse. M&S has worked with WRAP on carrier bag reuse initiatives.

M&S has conducted trials on degradable polythene bags made from cornstarch as an environmentally sustainable solution to degradable plastic made with heavy metal additives, which can contaminate the soil as it breaks down.

Recycling

Traditional town centre stores cannot offer car park recycling facilities. In 2002 M&S became the only major food retailer to eliminate PVC from its food packaging, to improve plastic recycling.

3. Nature

Sustainable fish

M&S commitment to sustainable fishing has been recognised by Marine Conservation Society, Greenpeace and Seafood Choices Alliance.

All M&S fish is MSC-certified or sourced from fisheries recognised as well-managed but not yet certified – for example, all cod is Icelandic – and avoids 'at risk' fish: skates/rays and rockfish were delisted in 2005. M&S policy applies to both fish sold and fish used as an ingredient. M&S sponsors 'Invest in Fish (South-West)' and has funded restocking schemes for wild Atlantic salmon and Cornish lobster.

Its farmed fish is covered by codes of practice for feed and growing. Every farm is audited for M&S animal welfare and environmental impact standards.

M&S communicates with customers on pack and website, in-store, and through advertising. M&S 'Look behind the Label' campaign included full-page adverts for responsible fish sourcing in most national newspapers.

Trees

M&S membership of the WWF-backed Forest & Trade Network commits it to reporting on its total use of wood, and sourcing more FSC-certified wood.

M&S has provided the first FSC-certified cardboard packs in the UK: its 80 million packs for cut sandwiches sold annually are now made from FSC-certified board (replacing plastic). This will be rolled out to other cardboard food packaging. Packaging for ready meals uses recycled board. M&S is working towards FSC certification for its tissue paper products.

M&S kitchenware is made from traceable rubberwood and other well-managed wood.

4. Sustainable farming

Organics/pesticides

M&S is a strong supporter of integrated crop management and a founder member of LEAF. All its suppliers work to M&S' 'Field to Fork' leading standards – including pesticide use. M&S' pesticide minimisation policy includes the use of biological control systems in crop production overseas.

M&S is reviewing its pesticide policy, having achieved many of its 2003 objectives. M&S banned 60 pesticides in 2003 and is phasing out 19 more. In 2004 it was rated the leading retailer on minimising pesticides by Friends of the Earth. M&S is working toward reduced or zero pesticide use – for example, residue-free

raspberries and apples and methyl bromide replacements in strawberry production.

M&S independent residue testing programme covers 47,500 product/active ingredient combinations annually. It was one of the first retailers to publish this data on its website.

Morrisons

Overall policy/targets

Morrisons aims to reduce its environmental impact through continuous improvement that minimises risks and negative impacts.

1. Climate change

Seasonality

Morrisons sources from the UK wherever possible. In season, it aims for 100 per cent British-sourced produce – for example, rhubarb, broccoli, courgettes and sprouts and virtually all potatoes, carrots, onions, cabbage and cauliflower. It promotes 'in season' products – for example, broccoli and rhubarb – through advertising and in-store materials.

Morrisons has many local suppliers of fresh fruit and vegetables, tailoring local products to local stores. It has worked to extend the UK growing season for certain produce. Produce is labelled with country of origin.

Transport

Morrisons avoids airfreight wherever possible, only excepting where there is no other viable or practical alternative or source of the produce, and only for perishable foods.

Morrisons is working to reduce the environmental impact of its transport fleet through maintenance, new engineering developments, fuel efficiency, driver training and, where possible, back-haulage. It has a number of compressed natural gas powered vehicles and some bulk product is transported

by rail freight. In 2006 Morrisons opened the UK's first BioEthanol E85 fuel pumps at 10 sites in England.

2. Waste

Packaging

Co-op avoids packaging materials which hamper recycling. It is working with WRAP to eliminate unnecessary packaging.

Carrier bags

Morrisons has tried various ways of encouraging carrier bag reuse, including a reward scheme, with limited success. Current focus is on responsible use and disposal. Every carrier bag carries the message: 'Please reuse this bag and help protect the environment'. It is looking at smaller bags and degradable options.

Longer-lasting charity carrier bags are available and most stores supply cardboard boxes. After a successful trial, facilities for carrier bag recycling are being rolled out to most stores.

Packaging

Morrisons has signed the 'Courtauld Commitment' to eliminate or reduce packaging, and is pursuing a number of projects with WRAP. Its fresh food 'Market Street' offers many items loose with minimal packaging. Packaging for some own-brand products includes recycled material. Stock movements use returnable baskets.

Recycling

Recycling facilities for some of the following – paper, aluminium, glass, clothing, shoes, books, CDs and plastics – are available at 329 stores.

3. Nature

Sustainable fish

Morrisons continually reviews and updates its fish policy. It is committed to buying from the most sustainable sources, wherever available. Morrisons does not sell marlin, shark, brill, ling, European hake, grey mullet, grouper, red fish, dogfish (huss), and Atlantic halibut or salmon.

Morrisons sells 22 species on the MSC's 'Fish to Eat' list and four MSC-certified products.

The source of all wet fish is stated on point-of-sale materials and packaging. Morrisons is working to improve labelling.

Trees

Morrisons is committed to purchasing timber from legal, well-managed and sustainable sources. Some paper products are manufactured using recycled materials.

4. Sustainable farming

Organics/pesticides

Morrisons sells a range of organic foods including meat, fish, poultry, eggs, bread, dairy products, fresh fruit and vegetables, cereals, wine, tea and coffee. It continually reviews the range.

Its comprehensive pesticide surveillance programme includes membership of the Assured Produce Scheme and EurepGap, which cover pesticide use, monitoring and control. Most of its fresh produce suppliers are either members of, or in the process of being accredited to, these schemes and also carry out their own pesticide residue testing programmes.

Sainsbury's

Overall policy/targets

Sainsbury's has reported on environmental KPIs for the last decade. These include renewable energy, waste, transport and packaging.

1. Climate change

Seasonality

Sainsbury's are committed to supporting British farmers – 90 per cent of what can be sourced is sourced from the UK. Sainsbury's has helped farmers extend growing seasons – for example, for strawberries, raspberries, plums, apricots, tomatoes, onions and asparagus. This includes a scheme to grow tomatoes 52 weeks a year, reusing waste CO₂ from an industrial plant. For organics it only sources outside the UK for authenticity reasons – eg, Parmesan cheese. It sources 65 per cent of own brand organic products from the UK, and aims for 70 per cent.

Sainsbury's has 3,500 local products in stores. Sainsbury's 'Supply Something New' scheme aims to help small and medium-sized local suppliers.

Sainsbury's raises awareness of seasonality with advertising and in-store activity – for example, celebrating UK apple and strawberry seasons, and Jamie Oliver TV adverts for asparagus and new potatoes. 'Try Something New Today' in-store tip cards use seasonal products. Fish, meat and delicatessen counter staff are able to communicate messages around seasonality and local products.

Transport

Most products sourced outside the UK are transported by land and sea, not air. Sainsbury's has reduced its road mileage by five per cent, and is aiming for a five per cent reduction in its transport-related carbon emissions by March 2009 (against a 2005/6 baseline).

Backhauling cuts 29,000 journeys a year in the UK. Rail freight includes 83 per cent of Italian wine, and water from Scotland.

Sainsbury's transport fleet is switching to more efficient engines and trialling gas powered vehicles to reduce environmental impact. Its internet shopping service uses electric vehicles.

Energy

Sainsbury's is aiming for a five per cent reduction in carbon emissions by 2008, against a 2004/5 baseline. It is working towards supplying ten per cent of the energy it uses from renewable sources.

2. Waste

Packaging

Sainsbury's is working to make as much packaging as possible recyclable and encourages customers to recycle. A number of projects aim to phase out PVC, utilise recyclable plastics, and introduce packaging made from compostable, renewable materials such as maize or sugarcane. Sainsbury's trial of compostable packaging on organic apples and potatoes is the first of its kind in the UK.

Sainsbury's has also reduced packaging and increased recyclability of Easter egg packaging.

Sainsbury's aims to reduce its operational waste, recover as much as is practical and dispose of the rest responsibly (for example, it donates unwanted food through a food donation scheme). It is working to replace 8,400 tonnes of cardboard with re-usable crates over two years.

These are all reflected in its KPIs.

Carrier bags

Sainsbury's aims to reduce carrier bag usage by 5 per cent, and to encourage reusable options rather than degradable bags. It offers several reusable options and sells 120,000 'bags for life' a week. This saves about 50 million standard bags a year. The profit from 'bags for life' goes into store-nominated community projects. In store recycling facilities for carrier bags collected 100 million bags (1,000 tonnes) last year.

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Recycling

Sainsbury's packaging contains information on recycling properties. Sainsbury's was the first retailer to label products 'sorry not recyclable'. It is extending its on-site recycling facilities, building on the network of local authority facilities already in situ.

Sainsbury's is the only major retailer to run a programme donating food still fit for human consumption to a range of charitable causes.

3. Nature

Sustainable fish

Sainsbury's is the UK's leading fishmonger and aims to source all its fish from sustainable sources. Sainsbury's offers the widest range of MSC products in the UK and was the first retailer to sell MSC-approved cod.

Sainsbury's delisted skate and huss in February 2006 and aims (working with MSC) to delist all red-rated fish by the end of 2006. It has communicated this to customers with suggested seasonal alternatives. By autumn 2006 it will avoid plaice, cod and haddock during their main spawning season.

Its 'New in Season' promotion celebrates fish seasonality by highlighting less well-known species – for example, Torbay Sole – when plentiful.

Its 'Try something new' campaign will feature tip cards promoting products such as oysters, sprats, redfish and halibut. In addition to on-pack information, fish counter staff will be

able to explain origin and method of capture.

Sainsbury's supports the Responsible Fishing Scheme. All UK boats supplying Sainsbury's will be certified to this scheme.

Trees

A member of the WWF Forest and Trade Network Group, Sainsbury's is committed to sourcing wood-based products from sustainably managed forests. It increased its FSC-certified products from six in 2004 to 21 in 2005 and will continue to raise the FSC-certified content of wood-based products.

4. Sustainable farming

Organics/pesticides

Following the launch of Sainsbury's 'So Organic' range in September 2005, organic sales have grown by 20 per cent. The range has also broadened, with price cuts on 100 lines. Initiatives such as 'Farm Promise' milk from farms 'in conversion' to organic are helping to grow product availability.

Sainsbury's seeks to reduce pesticides, using natural alternatives wherever possible, in its own brand. The company monitors pesticide residue year-round. Products exceeding maximum residue levels (MRL) are removed pending control measures. The number of products with any detected pesticide residue has dropped from 53 per cent in 2004/5 to 49.6 per cent in 2005/6, reducing those above the MRL by half.

Sainsbury's is developing crop action plans with twelve supplier groups to minimise pesticide residues on a dozen fruit and vegetable crops.

Somerfield

Overall policy/targets

Somerfield's key performance indicators are currently under review following the store's purchase by a private equity group.

1. Climate change

Seasonality

Somerfield magazine and in-store point of sale highlight seasonal produce. Somerfield purchases from the UK in season, provided quality meets specifications. Typically half of fruit and vegetables is UK-sourced. Somerfield works with suppliers to extend the growing season where possible, though it recognises local objections to polytunnels.

Somerfield always ensures availability out of season if there is sufficient consumer demand.

Transport

Somerfield aims to minimise airfreight primarily due to the cost. The company is working with WRAP to develop a new film to protect produce, enabling more lines to be transported by ship.

The company is reducing CO₂ emissions from its vehicle fleet through purchase of new fuel-efficient vehicles and looking into alternative fuels.

2. Waste

Packaging

Somerfield accepts any packaging of appropriate food grade. It uses recycled paper labels. Aluminium and tin cans and glass bottles have a recycled content. Recycled scrap plastic is used in plastic refuse sacks. It has no recycled plastic packaging.

Carrier bags

Somerfield has minimised the thickness of its carrier bags as far as is possible. Its bags are degradable and break down over 6-12 months. With support from WRAP, the company's trial 'bags for life' promotion will roll out to all stores later in 2006.

Recycling

Stores recover and recycle cardboard and plastic. Carrier bags are recovered in all stores and recycled.

3. Nature

Sustainable fish

Somerfield policy is to avoid and replace 'at risk' fish: it removed huss, swordfish and monkfish in 2005 and skate in 2006.

Trees

Somerfield uses FSC-certified stock for all its virgin wood products except for pine,

rubberwood and bamboo. In some cases the wood is supplier-certified as recycled or reclaimed, but cannot be FSC-certified.

For cost reasons, there is no recycled content in toilet paper, kitchen towels or tissues, except for its 'Makes Sense' facial tissues.

4. Sustainable farming

Organics/pesticides

Somerfield offers organic products where there is space and demand. The company is working with the Assured Produce Scheme (ACP) and EurepGap to minimise pesticide use. It aims to achieve 'no detectable residues' by means of good agricultural practice.

Tesco

Overall policy/targets

Tesco aims to reduce its energy use per square foot by half by 2010, against a 2000 baseline. It aims to reduce CO₂ emissions from its vehicle fleet (per case delivered) by 30 per cent, and to increase store waste recycled to 80 per cent, over the next three years.

1. Climate change

Seasonality

Tesco aims to increase its British produce. It helps small suppliers, works with farmers to extend growing seasons, and clearly labels food origins. Tesco promotes British and regional foods in-store. It aims to increase regional produce available and increase its celebration of British seasons this year.

Transport

Tesco is moving from air to sea freight wherever possible. It is improving the efficiency of its distribution fleet and aims to reduce CO₂ emissions per case of goods delivered by 30 per cent over next three years, including using rail transport instead of road.

Energy

Tesco has established a £100 million fund for sustainable environmental technology such as wind turbines, solar panels, combined heat and power and gasification. It intends to reduce its

energy use per square foot by half by 2010, against a 2000 baseline. Tesco has opened two model 'energy efficient stores'; this model will apply to all new stores.

2. Waste

Packaging

In July 2005 Tesco signed the 'Courtauld Commitment' to help reduce the growth in household waste, and its packaging strategy group is working to reduce waste throughout the business. The cardboard used for fresh pizzas has been reduced by 60 per cent.

Carrier bags

Tesco is working to reduce carrier bag use by a quarter (one million fewer bags) by 2008 and has introduced a Clubcard incentive scheme for customers reusing bags. It will introduce degradable bags to all stores by September 2006 and reduce the amount of plastic in its bags by ten per cent in 2005/6. It has increased promotion of 'bags for life' and other reusable carriers. 'Bags for life', made from 100 per cent recycled plastic, feature prominent recycling messages. Tesco.com delivery drivers are trained to ask customers to return used bags and staff are trained to use fewer bags when packing customers' shopping. All stores have prominent carrier bag recycling units.

Recycling

Tesco wants to lead on recycling and aims to encourage customers to double the amount they bring to stores to recycle: nine out of ten customers say they would recycle more if it were easier. This could account for ten per cent of the UK total needed to meet EU packaging recycling targets by 2008. Over the past two years Tesco has invested in innovative recycling machines which sort plastic, metal and glass, and plans to add 100 more in front of store this year.

Tesco has increased the store waste it recycles from 55 per cent to 71 per cent over four years, working toward 80 per cent over the next three. It is testing gasification to find clean ways to generate energy from food waste.

3. Nature

Sustainable fish

Tesco is committed to sustainability in its seafood sourcing and avoids over-fished or vulnerable stocks by sourcing from MSC-certified fisheries. Tesco works with fisheries to gain MSC certification. Tesco sells more MSC-certified products than any other supermarket. In 2005/6 all Tesco fresh fish counters were MSC-certified. Tesco aims to introduce five new MSC-certified lines in 2006/7. It also works with suppliers and the industry to improve sustainability of fisheries and fishing methods, including minimising harm to other species. Tesco promotes sustainable fish

species in store by increasing the range stocked, providing clear origin labelling, training staff in sustainability issues and promoting the MSC in-store. In March 2006 Tesco introduced organic cod.

Trees

Tesco never knowingly purchases timber from illegal sources. All sources of timber for garden furniture are either FSC-approved or members of the Tropical Forest Trust (TFT) who are committed to achieving FSC certification.

Tesco is committed to purchasing tissue and disposable paper from legal, sustainable sources. All pulp used for own-brand toilet rolls, paper towels, facial tissues, wet wipes and nappies is made from recycled waste or timber from well-managed forests; there is a choice of tissue products containing totally recycled content, 30 per cent recycled content, or virgin pulp. In 2005/6 Tesco sold 80 million rolls of 100 per cent recycled Value toilet paper. Tesco is making recycled content clearer on its labels.

4. Sustainable farming

Organics/pesticides

Tesco's integrated farm management scheme, 'Nature's Choice', ensures that fruit, vegetables and salad meet high safety and environmental standards. Ninety per cent of suppliers met the requirements. In 2005/6 and

Tesco aims to increase this to 100 per cent by 2007. The standards include use of pesticides and fertilisers, responsible use of energy, water and other natural resources, pollution prevention, and wildlife and landscape conversation.

Tesco has reviewed the use of 10,000 pesticides used on 90 crops worldwide. It has banned 260 and more strictly controlled 1,000 more.

Waitrose

Overall policy/targets

Waitrose CSR targets include energy, waste, emissions, transport and packaging.

- Waste: increase in waste recycled by 10 per cent in 2006 and reduction in waste produced per £1million turnover by 10 per cent, based on 2003 figures
- Emissions: ten per cent reduction in CO₂ emissions per £million of sales by 2010, based on 2000 figures
- Transport: fewer miles driven per £million of sales year-on-year
- Packaging: weight of packaging relative to sales not to exceed 2002 baseline.

1. Climate change

Seasonality

Waitrose has a strong policy of buying British and selecting local and regional produce – for example, during British growing season 70 per cent of apples and 100 per cent of strawberries are UK-sourced. All Waitrose milk, cream and eggs and over half of fresh vegetables are sourced in the UK.

Waitrose has more than 170 local (within 30 miles of the shop) suppliers, providing over 500 product lines. Products are clearly labelled to support local businesses and raise awareness of seasonality and food miles.

Waitrose promotes British products when in season. Its recently launched sourcing website provides information on its British, regional and local sourcing commitments.

Transport

Transport represents 19 per cent of Waitrose's carbon footprint (calculated since 2000). Although total mileage is increasing as a result of significant growth in business over the last two years, total mileage per £million of sales is decreasing year on year. Waitrose aims to produce ten per cent less CO₂ emissions per £million of sales by 2010 (based on 2000 figures). Waitrose is improving its fuel efficiency and use and evaluating the effect on food miles of local deliveries.

Energy

Waitrose aims to five per cent less energy than 2003 by 2008, and ten per cent by 2013.

2. Waste

Packaging

Waitrose has signed the WRAP 'Courtald Commitment' to minimise product packaging. Packaging consumption relative to sales has fallen – 24 per cent less in 2005 than in 2002. It is trialling biodegradable materials in its organic product ranges.

Waitrose has a commitment that the weight of its packaging relative to sales will not exceed the 2002 baseline.

Carrier bags

Waitrose aims to discourage carrier bag use and was the first UK supermarket to introduce

the reusable 'bag for life' in 1997. These are recycled into 'plaswood' furniture when replaced. Each year the Waitrose 'bag for life' saves over 50 million conventional carrier bags. Waitrose also has a biodegradable jute wine bag and heavy duty carrier bags. It is conducting trials for in-store carrier bag recycling facilities.

Recycling

Packaging includes recycled content where possible. Over 70 per cent of shops offer customer recycling facilities. All stores recycle cardboard and plastic, which representing 45 per cent of waste.

3. Nature

Sustainable fish

Waitrose sources all fish from well-managed fisheries, using responsible fishing methods. It works with MSC and delists fish where there are concerns about sustainable resources: North Sea cod and haddock fishery were delisted in 1999 and in 1996 Waitrose was the first retailer to stop selling fresh, wild Atlantic salmon. It has stopped selling marlin, wild Atlantic salmon, blue fin tuna, sturgeon products, shark, ling, dogfish, Chilean sea bass, Atlantic halibut, threatened skate and rays and orange roughy.

Over seven years it has converted all fresh and smoked cod and haddock to line-caught, greatly reducing impact on the marine environment. It also sells a wide selection of

farmed fish from well-managed sources – approximately half of all fish sold.

Waitrose is committed to increasing customer awareness of sustainability through its website, leaflets in branches and staff on service counters. Fish specialists in each branch receive comprehensive training to ensure they can speak to customers with confidence and authority.

Trees

Waitrose subscribes to John Lewis Partnership's policy to source only independently certified timber, such as FSC. Waitrose's own-brand tissue and toilet papers use only FSC-certified paper, 100 per cent recycled products or those which have achieved the EU Ecolabel standard.

4. Sustainable farming

Organics/pesticides

Waitrose offers one of the widest organic ranges – more than 1,300 products. Waitrose organic sales have a 17 per cent share of the organic market, against Waitrose's 3.8 per cent overall market share.

Waitrose uses the LEAF marque extensively and is the only retailer to insist that all its British growers adopt it.

Waitrose's policy either restricts or prohibits altogether the use of a number of agro-chemicals.

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