

green grocers

how supermarkets can help
make greener shopping easier

by **Lucy Yates**



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The content of the report and the views expressed within it are those of the NCC.

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Executive summary

Supermarkets – where most of us buy our food – have an important role in helping us do our bit for the environment. Since our last *Greening supermarkets* report in 2006¹, we have seen environmental issues rise higher on the agenda, with announcements from a number of big retailers. These announcements have covered a variety of issues, from reductions in unnecessary packaging to new ‘green’ labelling schemes for products, such as carbon labelling and aeroplane stickers on airfreighted goods.

Supermarkets now face the challenge of turning their plans for greener practices into reality. The NCC welcomes their commitments and supermarkets’ enhanced focus on green issues. However, some supermarkets are doing more than others in this area and it is yet to be seen if any retailers have gone far enough to encourage and enable consumers to change their behaviour and make greener

choices. This research shows that there are further simple things that supermarkets could do to make greener choices easier for consumers.

Our supermarket survey was conducted in April 2007. This year, we continue to rate the top eight food retailers in the UK on a range of consumer-focused environmental indicators, covering climate change (seasonal food and light bulbs), waste and recycling, sustainable fish and sustainable farming. The report keeps many of the same indicators as last year, but with a few small changes (see panel, page 2).

Better scores

We found that there have been improvements since last year across the ratings. In particular, we are pleased to see that this year all the supermarkets achieved an overall rating of ‘D’ and above whereas last

year two supermarkets had scored an ‘E’ rating (Morrisons and Somerfield). We also now have three supermarkets achieving a ‘B’ (M&S, Sainsbury’s and Waitrose), rather than just one last year (Waitrose).

This year, the availability and promotion of sustainable fish has improved across all the supermarkets. We were disappointed to see some supermarkets slip in their ratings for stocking and promoting in-season vegetables and organic fresh produce. As in 2006, no retailer did well across every indicator, and each has particular areas that it could focus on to improve its performance.

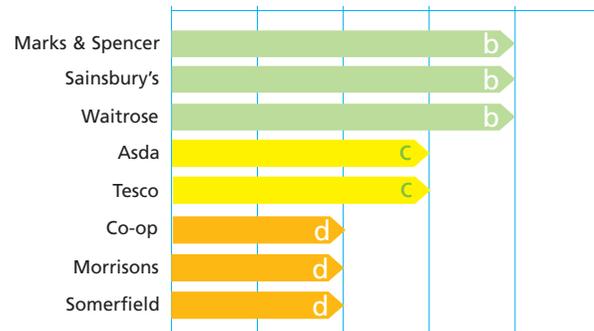
We recognise that supermarkets are doing good things behind the scenes, such as cutting the waste they send to landfill and converting their store electricity supplies to green energy. However, the largest review of the evidence yet shows that the food we eat is responsible

for 31 per cent of the average European household’s impact on climate change². This, coupled with the fact that, according to the research organisation IGD, in 2006, 72 per cent of grocery sales took place in supermarkets³, means that retailers have huge potential to help their customers make greener choices.

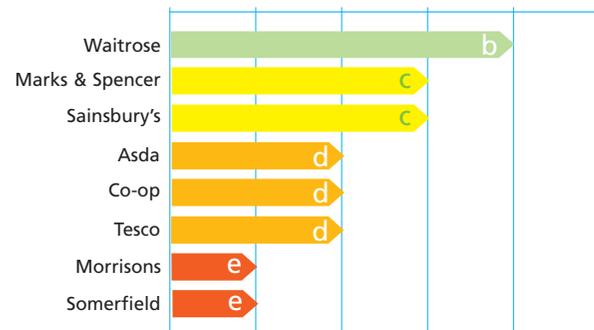
Aim higher

We want to see more supermarkets setting challenging targets on green issues. There are some good examples of this, such as the M&S ‘Plan A’. Launched in January 2007 along with the company’s 2007 annual report, Plan A is a five-year plan that holds M&S to account on 100 green targets⁴. We want to see other supermarkets following this example, providing clarity and ambition in their targets and reporting annually to improve their ratings for all our indicators.

Overall ratings, 2007



Overall ratings, 2006



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

The NCC's Greening Supermarkets indicators

1. Climate change: reducing CO₂ emissions

- ▶ Seasonal food: availability, promotion and signposting of ten in-season UK-sourced vegetables.
- ▶ Seasonality information: ability of supermarket helplines and websites to provide information on seasonal produce.
- ▶ Energy-saving light bulbs: the provision and promotion of energy-efficient light bulbs; and the cost of, and price differential between, these and less efficient equivalents.

2. Waste: action to reduce, re-use and recycle

- ▶ Recycled content, and content certified by the Forest Stewardship Council (FSC): proportion and promotion of recycled and FSC-certified content in breakfast cereal packaging, toilet paper, kitchen towels.
- ▶ Carrier bags: incentives to reduce use – or encourage re-use – of carrier bags, including offers of 'bags for life'.

3. Sustainable fish: supporting sustainable sourcing

- ▶ Availability and promotion of sustainably sourced fish, including those with Marine Stewardship Council (MSC) certification⁵; information, including fish species, for standard own-brand fish fingers.
- ▶ Ability of in-store staff and customer helpline to provide information on fish sustainability.

4. Sustainable farming

- ▶ Organics: provision and promotion of organic options in ten food products.
- ▶ Pesticides: the promotion of produce from certified farming methods that use fewer chemicals and promote biodiversity, such as products certified by the organisation Linking Environment And Farming (LEAF)⁶; and the communication of pesticide reduction policies.

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 during telephone helpline and website surveys conducted in April 2007. The overall company ratings give equal weight to each of the four 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 North-east of England centred on Newcastle, and one in the Southeast, focusing on stores close to urban centres, in a broad cluster touching 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 to reflect the shopping experience of consumers in our two areas.

In addition, we wrote to companies asking for details of their relevant policies (details of which are available at www.ncc.org.uk/nccpdf/misc/green_grocers_appendix.pdf). We present our findings in the context of what companies told us, but our ratings are based entirely on what was found in store to ensure that our conclusions continue to reflect the everyday shopping experience of consumers.

There are some minor modifications to last year's report, as follows:

- To the climate change indicator, we added the provision and promotion of energy-efficient light bulbs; and the cost of, and price differential between, these and less efficient equivalents.
- For the waste indicator, we added a section on trees, looking at recycled and FSC-certified content in cardboard packaging and paper products. We also renamed our previous 'nature' indicator 'sustainable fish'.
- To the sustainable fish indicator we added a new aspect looking at the fish species used in standard own-brand fish fingers and any information provided about the source and sustainability of those fish ingredients.
- For the climate change indicator, we updated the list of ten seasonal vegetables to reflect the time of year the survey was conducted.

As in 2006, we also collected the following further information to provide additional qualitative commentary. However, this data was not included in the ratings:

- Using aggregate UK fruit import data from HM Revenue and Customs, we compared supermarkets on the full range of fruit they stock and promote, assessing how far the fruit has travelled and how likely it is that this fruit will have been airfreighted. This information gives a useful snapshot of each supermarket's relative reliance on carbon-intensive produce, as well as giving information on how much produce comes from less wealthy countries.
- Researchers recorded whether any of the fruit in each supermarket was marked as 'Fairtrade'. This information gives a reasonable impression of each supermarket's commitment to supporting fairly traded produce from less wealthy countries.

The NCC's Greening Supermarkets Challenge

We think supermarkets can do much more to help their customers to make greener choices. We therefore make recommendations in the following areas:

Climate change

We urge supermarkets to:

- ▶ Source, clearly identify and promote UK seasonal produce all year round, in order to help consumers eat seasonally.
- ▶ Promote and stock a wider range of energy-saving light bulbs. Reduce the price differential of energy-efficient light bulbs. Phase out the sale of non-efficient bulbs altogether, well before the government's target date of 2011.

Waste

We urge supermarkets to:

- ▶ Go beyond the industry standard for reducing the use of plastic carrier bags, by providing customers with incentives to re-use carrier bags, and by and phasing them out of use completely.
- ▶ Make greater use of recycled and FSC-certified materials. For example, in packaging and mainstream paper products, set targets for 100 per cent recycled and FSC-certified content.
- ▶ Communicate with consumers about the need to reduce, re-use and recycle, for example by putting information on all packaging on how best to dispose of it.

Sustainable fish

We urge supermarkets to:

- ▶ Set ambitious targets for sustainable sourcing, including 100 per cent sustainably sourced fish.
- ▶ Communicate with customers about sustainable sourcing, particularly sustainably sourced fish and MSC certification. Take non-sustainable fish off the shelves and explain to customers why these species are no longer available.

Sustainable farming

- ▶ Set stricter targets for increasing the range of organic and other low chemical food options.
- ▶ Set ambitious targets for eliminating chemicals perceived as risky, including pesticides from food production, and for minimising pesticide residues in food. Communicate these strategies to farmers, suppliers and customers.

Additional issues

We have identified other areas where supermarkets could help consumers make greener choices, but which we chose not to cover in this report.

They are:

- ▶ Online shopping: supermarkets could create more sophisticated search facilities to allow searches for UK in-season produce, MSC-certified fish and organics.

There are already some good examples, such as Sainsbury's online shopping facility. A search for the term 'seasonal' returns lists of UK produce, flagged 'Best of British'. Additional information is also provided on these products, including useful information about food provenance.

- ▶ Delivery options: expanding delivery fleets to green vehicles (for example, renewably powered electric or waste oil) both for goods delivered to the store from depots and from the store to customer's homes.
- ▶ Customer transport to and from stores: encouraging alternatives to car use, such as buses or online ordering.

The way that customers travel to and from the supermarket is a major component of the overall environmental impact of food. It has been estimated that the carbon dioxide emissions generated by people driving their food shopping home could equal those generated by the commercial transportation of food within the UK⁷.

- ▶ Training staff: specialist staff in store and staff on helplines to be able to answer basic questions about green issues. Training also needs to be extended to buyers and senior management to get sustainability ingrained in the business.

Examples of good practice show that this can be achieved. Staff at the fish counters in Waitrose had a high level of understanding about MSC certification and sustainable fish, and had a booklet to give out to customers. Its helpline also gave accurate information on UK in-season produce.

- ▶ Seasonality: clarity around what is meant by the term 'seasonal' and accurate use of it to avoid misleading consumers.

We want supermarkets to be clearer with their customers about what is meant by 'seasonal produce'. There must also be clarity around growing methods. For some UK produce, growing seasons have been extended through heated greenhouses, which may cancel out the benefit of local sourcing.



The report cards



Name: Asda		Date of report: April 2007	
Comments	Rating		
<p>Climate change</p> <p>Seasonal UK-sourced food</p> <p>Showing potential: 64% of in-season veg was UK-sourced. However, ground has been lost since last year's survey, with 69% achieved in 2006.</p>	C		
<p>Energy-saving light bulbs</p> <p>Showing potential: non-efficient bulbs dominated the display but there was some choice in energy-saving equivalents. There was a price promotion on 11W and 20W energy-saving bulbs.</p>	C		
<p>Waste</p> <p>Reduce, re-use, recycle</p> <p>Good: progress being made by offering FSC-certified toilet paper as the main own-brand product. There is still work to do on declaring recycled content of breakfast cereal packaging.</p>	B		
<p>Sustainable fish</p> <p>Showing potential: there is some improvement since last year with more MSC options but there is still more that could be done. However, Asda did sell MSC-certified 'Smart Price' value fish fingers, with information prominently displayed.</p>	C		
<p>Sustainable farming</p> <p>Showing potential: this year the number of organic lines has increased from 10% in 2006 to 18% in 2007. However, more could be done to promote these items.</p>	C		
<p>Overall comments and score</p> <p>Showing potential: rating has improved since last year - from a D to a C. Improvements made in FSC certification of paper products but more needs to be done to promote UK in-season produce.</p>	C		

Name: Co-op		Date of report: April 2007	
Comments	Rating		
<p>Climate change</p> <p>Seasonal UK-sourced food</p> <p>Showing potential: some good progress since last year, with the proportion of UK in-season vegetables up from 55% to 76%. However, little promotion of seasonality in store, and the helpline and website provided no information on this aspect of sourcing.</p>	C		
<p>Energy-saving light bulbs</p> <p>Poor: the north-east store did not have any energy-saving bulbs and the south-east store had only one, costing £6.49, 22 times the price of the non-efficient bulbs.</p>	E		
<p>Waste</p> <p>Reduce, re-use, recycle</p> <p>Showing potential: more recycled toilet paper than in 2006. However, no plastic bag recycling points in store and, although the company is meeting the industry standard for carrier bags, it is not giving customers any disincentive to use new carrier bags.</p>	C		
<p>Sustainable fish</p> <p>Room for improvement: availability had increased since last year but more could be done to highlight MSC-certified products to customers and to give better information via staff in store, on the helpline and on the website.</p>	D		
<p>Sustainable farming</p> <p>Room for improvement: the proportion of organic lines has dropped from 13% to 9% in 2007. While a few organic products were offered in each store, many more non-organic products were on sale.</p>	D		
<p>Overall comments and score</p> <p>Room for improvement: improvements have been made with the proportion of UK-sourced vegetables but there still needs to be more promotion of these to customers. Unsatisfactory drop in amount of organic products offered in store.</p>	D		





Name: M&S
 Date of report: April 2007

Comments	Rating
Climate change Seasonal UK-sourced food Room for improvement: little change in the proportion of UK in-season produce (55% in 2006 and 56% in 2007). Some promotion of seasonal produce through Union Jack stickers but confusing messages given through 'spring offers' on spinach from Spain and Portugal.	D
Energy-saving light bulbs No light bulbs sold in these stores, so rating not applied.	n/a
Waste Reduce, re-use, recycle Showing potential: good communication of recycled content on cereal packaging and offering 100% recycled kitchen towel and toilet paper (though no FSC-certified options). However, doing no more than meeting the industry standard for plastic bags - no disincentive to use new carrier bags and no plastic bag recycling points in store.	C
Sustainable fish Excellent: the majority of fish products carried sustainability information and statements of the company's commitment to stock fish from well managed fisheries. The website had excellent information about sustainable fish.	A
Sustainable farming Showing potential: the proportion of organic products was around the same as last year, decreasing by only half a percent (from 16% to 15.5%). In some categories there were more products available, such as bread and tea, but in others, such as lettuce and potatoes, there were fewer.	C
Overall comments and score Good: excellent score for sustainable fish, but could have done better by having more UK-sourced, in-season vegetables and by doing more to provide disincentives to use new carrier bags.	B

Name: Morrisons
 Date of report: April 2007

Comments	Rating
Climate change Seasonal UK-sourced food Showing potential: a high proportion of UK in-season vegetables, matching the 2006 level of 71%. However, no promotion of seasonality in store, and the customer helpline did not have any information.	C
Energy-saving light bulbs Good: some promotions on energy-saving bulbs, with the cheapest sold at 99p. Energy-saving bulbs were just twice the price of non-efficient bulbs, one of the lowest differentials in the survey.	B
Waste Reduce, re-use, recycle Poor: there was no improvement from 2006, with still no declared recycled content on packaging and no FSC-certified content. The only store not to offer a 'bag for life'.	E
Sustainable fish Showing potential: significant improvement on number of MSC-certified products and good information from the north-east store. However, no information was available on the helpline or in the south-east store.	C
Sustainable farming Room for improvement: a slight drop from 11% to 9% of organic produce because there were no organic options in several product categories such as pears and tea.	D
Overall comments and score Room for improvement: a better score than last year but still areas that need more attention, such as encouraging re-use of carrier bags, and more organic produce. However, there was significant improvement in the number of MSC-certified products stocked, and the stores had a high percentage of UK in-season vegetables.	D





Sainsbury's	
Name:	April 2007
Date of report	
Comments	Rating
<p>Climate change</p> <p>Seasonal UK-sourced food</p> <p>Showing potential: the proportion of in-season UK produce increased marginally from 59% in 2006 to 60% in 2007. The website had an impressive amount of information about seasonal food and more information on provenance than any other supermarket.</p>	C
<p>Energy-saving light bulbs</p> <p>Showing potential: there were some promotions on energy-efficient products, and the cheapest efficient bulb was £2.09. However, the Basics non-efficient bulb was the cheapest in the survey at 8p so there is a larger price differential between efficient and non-efficient options.</p>	C
<p>Waste</p> <p>Reduce, re-use, recycle</p> <p>Good: this year, there were more FSC-certified toilet paper and kitchen roll options, and an expanded use of the FSC logo. A special 'bag for life' promotion was in operation at the time of the survey.</p>	B
<p>Sustainable fish</p> <p>Good: had a good range of own-brand MSC-certified foods including an MSC-certified children's fish product with information displayed prominently on the label. Staff were well trained and informative, and there was some information available on the website.</p>	B
<p>Sustainable farming</p> <p>Showing potential: from a leading position in 2006, when it had a reputation for promoting organic produce, Sainsbury's has disappointingly reduced its organic options in our key organic categories, from 21% to 12%.</p>	C
<p>Overall comments and score</p> <p>Good: top of the 'big four' retailers. Strong rating for sustainable fish, with a good range of own-brand MSC-certified products. However, there was a disappointing drop in organic produce and there is room for more UK in-season vegetables.</p>	B

Somerfield	
Name:	April 2007
Date of report	
Comments	Rating
<p>Climate change</p> <p>Seasonal UK-sourced food</p> <p>Good: had the largest proportion of in-season UK produce, also representing the greatest increase, from 62% in 2006 to 80% in 2007.</p>	B
<p>Energy-saving light bulbs</p> <p>Showing potential: no price promotions in store and only a few options available in both efficient and non-efficient bulbs. However, at £1.99 the energy-efficient option had one of the lower price differentials that we found in stores.</p>	C
<p>Waste</p> <p>Reduce, re-use, recycle</p> <p>Room for improvement: marginally leading the way by offering incentives to bring back used bags: a free 'bag for life' for bringing back five bags. However, there was no improvement on 2006 when it came to declaring the amount of recycled content in cardboard packaging or recycled paper products.</p>	D
<p>Sustainable fish</p> <p>Room for improvement: some progress has been made, with more MSC-certified products found in store. However, these were not prominently displayed or promoted, and staff could not provide any information about them.</p>	D
<p>Sustainable farming</p> <p>Room for improvement: the number of organic lines has increased from 4% to 7%. Although this figure is still the lowest in our whole survey, it does show progress.</p>	D
<p>Overall comments and score</p> <p>Room for improvement: an increased score from last year's E. There has been particular progress in UK, in-season produce - it had the largest proportion of such products and showed the greatest increase on last year (from 62% to 80%). Let down by lack of information in store and on helplines.</p>	D





Name: Tesco		Rating
Date of report: April 2007		Rating
Comments		Rating
Climate change	Seasonal UK-sourced food	C
	Showing potential: the proportion of in-season vegetables had increased since last year's survey - from 61% to 66%. However, the term 'new season' was used for both UK and imported produce. No information available via helpline but some present on website.	
	Energy-saving light bulbs	B
	Good: own-brand Tesco value energy-efficient light bulbs were only 81p in the south east, five times the price of the non-efficient (price at 1.6p), and the cheapest efficiency was displayed on the shelves in the south-east store.	
Waste	Reduce, re-use, recycle	C
	Showing potential: marginally leading the way by offering incentives to bring back used bags: Tesco was offering Clubcard points for the re-use of bags. However, no improvement since 2006 on declared recycled content of packaging, kitchen paper and toilet roll.	
	Sustainable fish	D
	Room for improvement: There was a small improvement on the amount of MSC-certified fish but these were not prominently displayed or promoted. Sold the largest number of potentially 'at risk' fish species in the survey.	
	Sustainable farming	B
	Good: the number of organic lines has increased from 16% to 20%, with an improvement across nearly the whole range.	
Overall comments and score		C
Showing potential: good progress in many areas, particularly in increasing organic lines from 16% to 20%. It was impressive that Tesco offered the cheapest energy-efficient light bulb in the survey but they were let down by a lack of information in store and on helplines.		



Name: Waitrose		Rating
Date of report: April 2007		Rating
Comments		Rating
Climate change	Seasonal UK-sourced food	B
	Good: the proportion of UK in-season produce has increased from 53% to 62%. Some good promotions, particularly a large stand of vegetables from Yorkshire farms in the Newcastle store. The helpline was the only one in our survey to be able to give accurate information on UK in-season produce.	
	Energy-saving light bulbs	C
	Showing potential: the cheapest energy-efficient bulb was £1.49, with non-efficient bulbs being three times cheaper.	
Waste	Reduce, re-use, recycle	C
	Showing potential: about half of the own-brand cereal packaging has a high recycled content and an own-brand kitchen towel had an eco label awarded by the EU. However, there was no disincentive for using carrier bags.	
	Sustainable fish	A
	Excellent: fish counter staff were very helpful and knowledgeable and also provided a Waitrose leaflet on fish ('very useful guide to fish'). Information provided on the website was in-depth and clear.	
	Sustainable farming	A
	Excellent: the amount of organic and LEAF-Marque certified products has increased from 19% to 23% since last year.	
Overall comments and score		B
Good: a top retailer for the second year in a row, with excellent policies on sustainable farming and fish. Could do more to increase the amount of in-season, UK-sourced produce.		



TESCO
QUALITY
BRITISH
PRODUCE



Only open prior to opening

Do not break

Do not break

Blessed

FOR

QUALITY
BRITISH
PRODUCE

1 Climate change

What is the issue?

We set out to measure and compare supermarkets on how well they help consumers reduce their CO₂ emissions through the products they buy.

Seasonal food

The largest review of the evidence yet shows that the food we eat is responsible for 31 per cent of the average European household's impact on climate change⁸. There is an opportunity, if done right, to promote seasonal food as an effective and enjoyable way to tackle climate change. Supermarkets can have a key role in this, stocking and promoting UK seasonal food to their customers.

Energy-efficient light bulbs

We also looked at the provision and promotion of energy-efficient light bulbs; and the cost of, and price differential between, these and less

efficient equivalents. Energy-saving light bulbs use a quarter of the electricity of ordinary bulbs to generate the same amount of light⁹. If every home in the UK installed three energy-saving bulbs, it would save enough energy to run the country's street lights for a year¹⁰.

What we did

We rated companies on*:

- ▶ the percentage of UK seasonal produce within our ten in-season categories;
- ▶ our judgement of their promotion of in-season vegetables;
- ▶ the results of our telephone helpline and website surveys;
- ▶ the provision and promotion of energy-efficient light bulbs; and
- ▶ the cost of, and price differential between, these and energy-efficient equivalents.

* averaged across the two stores surveyed

Seasonality

We gave a mark out of ten for each store, according to the following criteria:

- how much seasonal produce was available to buy in store (maximum five points);
- the degree to which seasonal produce was promoted in store (maximum three points);
- whether information about seasonal produce was available on customer helplines (one point); and
- whether information about seasonal produce was available on the website (one point).

Our survey took place in April 2007. Last year's survey was in March 2006, so this year we updated our list of vegetables based on advice from the UK industry's Fresh Produce Consortium on what supermarkets might reasonably be expected to sell during the survey period.

Our ten were:

- ▷ purple sprouting broccoli
- ▷ cabbage (red, savoy and white)
- ▷ spring greens
- ▷ carrots
- ▷ cauliflower
- ▷ celeriac
- ▷ onions
- ▷ parsnips
- ▷ potatoes
- ▷ swede.

Transportation

As in 2006, we recorded the declared country of origin for all fresh fruit in the supermarkets surveyed. Using aggregated UK fruit import data collected by HM Revenue & Customs¹¹, we assessed how far the fruit had travelled and the likelihood of it having been imported by air, which is the most fuel and carbon-intensive mode of transport. We also looked at how much of the non-EU fruit was from

countries that have a low or medium Human Development Index (HDI) rank¹², indicating relative poverty. Further, we looked at how much produce was certified Fairtrade, guaranteeing a fair price to producers in poor countries. We used this data purely to provide additional context for broad sustainability issues. However, these factors were not included in the rating because we cannot be certain about whether any particular product has been airfreighted.

What we found

Seasonal food

Using average figures across the two stores – and moderated by responses from telephone helplines and seasonality information found on the supermarket websites – differences between the supermarkets emerge.

Somerfield had the largest proportion of in-season UK produce at with 80 per cent, closely followed by the Co-op with 76 per cent and Morrisons with 71 per cent. M&S and Sainsbury's had the lowest, with 56 per cent and 60 per cent respectively.

As with last year, there is room for improvement for all the supermarkets, with a significant proportion of vegetables being imported that could be sourced within the UK. All the supermarkets sold imported produce in the categories surveyed when there was UK produce available. We found parsnips and carrots from Israel (Waitrose), potatoes from Egypt and Honduras (Asda), and onions from Argentina (Asda, Co-op, M&S, Sainsbury's and Tesco)

Tesco had the highest proportion of fruit likely to have been imported by air, up from seven per cent in 2006 to 15 per cent in 2007. The Co-op had the lowest proportion of fruit

likely to have been airfreighted (only one out of 33 fruits).

We were disappointed to see that M&S had increased the amount of long-distance vegetables from two per cent to 18 per cent, on lines for which UK in-season produce was likely to be available, such as potatoes, parsnips, carrots and onions.

Sainsbury's had the greatest proportion of Fairtrade fruit, at ten per cent. The Co-op was joint second with Morrisons – both had six per cent of their fruit as Fairtrade. Tesco had only 3.5 per cent being Fairtrade and Somerfield only two per cent.

No supermarket shone in terms of promoting seasonal food in all of the places surveyed – that is, in store, through the helpline and on the website. Generally, information and promotion was patchy.

However, there were some good examples, such as the Sainsbury's website, which had an impressive

amount of information about seasonal food, promoted with videos of Jamie Oliver, and highlighted in the online shopping facility.

The M&S website provided clear information on the importance of buying seasonal produce but it could do more to identify what the products are at particular times of the year.

Retailers such as Asda and Co-op had 'British-grown' signs and Union Jack flags on packaging but our researchers reported that this was not very prominent.

Waitrose had a large stand of vegetables from Yorkshire farms in Waitrose (in the north-east store). However, we also found a sign in the Waitrose south-east store next to the plums, which read:

'the best the world has to offer: as a stone fruit season ends in one country, it begins in another, which is why we follow the harvest around the world selecting different varieties, to bring you the best quality in stone fruit'.

This type of promotion could send misleading messages to consumers about the benefits of selecting in-season products.

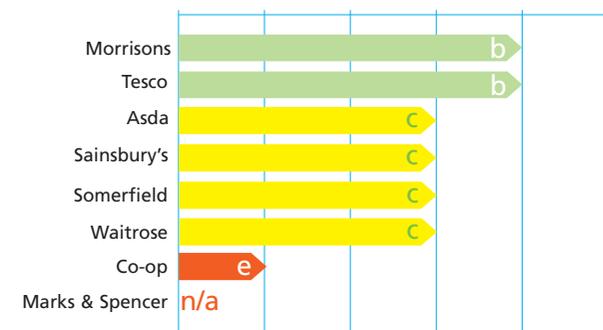
The information available from helplines was also disappointing. As in 2006, Waitrose was the only retailer to be able to give us accurate information. Sainsbury's and M&S gave some good information but our analysis showed that some of it was inaccurate, listing items that were not in season. Staff from Asda, Co-op, Morrisons, Somerfield and Tesco could provide no information at all.

Our surveyors found no information about food transport except for some airfreight stickers on fresh produce in Tesco and M&S. However, there was no explanation about what the stickers meant and their use is potentially misleading for consumers because it may not give a true reflection of the environmental impact of a product.

Retailer ratings for seasonal vegetables



Retailer ratings for energy-efficient light bulbs



Greenpeace light bulbs campaign

Greenpeace wrote to all major lighting retailers in early 2007 asking whether they:

- ▶ support the principle of mandatory minimum efficiency standards for energy-using products
- ▶ would support a ban, at UK or EU level, on sales of all incandescent light bulbs
- ▶ would eliminate incandescent light bulbs from their range, and, if so, by when.

Greenpeace produced a league table of light bulb retailers, demonstrating which retailers are taking the lead and which are lagging behind. The retailers were ranked only on their stated commitment to remove non-efficient light bulbs from sale.

Commitment to ending sales of incandescent light bulbs

A – end 2007	Currys
B – end 2008	—
C – end 2009	Habitat
D – end 2010	Asda, Morrisons, Sainsbury's
E – end 2011	Tesco, B&Q, Homebase, John Lewis, Waitrose, Co-op, Wickes/Focus
F – no commitment or post-2012	Ikea, Somerfield
Worst	Woolworths

Greenpeace is calling on all UK retailers to make a public commitment to an early and total phase-out of non-efficient light bulbs.

Energy-efficient light bulbs

M&S did not sell light bulbs in either store so are excluded from the rating for this part of the indicator.

We looked at 226 bulbs in total across all remaining 14 stores, of which 54 (about a quarter) were energy-saving options. Only Morrisons and Tesco had own-brand bulbs. Morrisons had three types of 11W own-brand bulbs; Tesco had one own-brand 11W bulb in its low-cost 'Value' range.

Our overall impression was that for inefficient light bulbs, there is a huge range of choice in terms of colour, fitting and shape. They were also often incredibly cheap. In comparison, the energy-saving light bulbs were often in small displays with little promotion.

In Sainsbury's, a single 'Basics' inefficient light bulb, 60W, cost 8p – the very cheapest light bulb in

the survey. In other stores, non-efficient light bulbs were also very cheap, with Tesco and Asda selling them for 16p.

Tesco and Morrisons were the only stores to offer an energy-saving light bulb in a low-price range. One of Tesco's 11W energy-saving light bulbs cost 81p. All three Morrisons energy-saving light bulbs were also quite cheap – 99p for 11W and 20W. Asda, Morrisons and Tesco all had special offers on the energy-saving light bulbs.

Looking at the cheapest option in each rating (60W and 100W and their equivalents), we can say that:

- in Morrisons, the energy-saving option was only twice as expensive as the non-efficient bulb in the south-east store.
- in Asda, the cheapest energy-saving bulbs were eight times more expensive than the cheapest non-efficient bulbs.

- in the Co-op, only one energy-saving bulb was sold, in one of the stores. It was 22 times more expensive than the cheapest non-efficient bulbs.
- in Somerfield, the cheapest energy-saving bulbs were four times more expensive than the cheapest non-efficient bulbs in the north-east store.

The initial purchase price of energy-saving bulbs is higher than that of a traditional incandescent bulb, which may dissuade people from buying them. Part of our rating looked at the price differential between the different types of bulbs to try and encourage retailers to make efficient options more attractive to consumers. Although very cheap inefficient bulbs could be seen as a good deal, retailers should give more prominence to energy-saving light bulbs and promote the cost saving

and environmental benefits of these products, while offering a wider range of fittings and shapes. The cheaper price sends a message that is inconsistent with what the retailers say they want to encourage.

What the companies told us

All the supermarkets in our survey were keen to assure us of their commitment to sourcing and promoting British produce. Sainsbury's told us that, in its stores, of the food that can be grown in this country, 90 per cent of it is sourced from the UK. There were some good examples of how the retailers were working to encourage and support more locally and regionally sourced foods (particularly Co-op, M&S, Morrisons, Sainsbury's and Waitrose). Sainsbury's has launched a new scheme, 'Farm Promise' in which it works with apple farmers to help increase British fruit growing and boost UK

agriculture. Waitrose has launched a promotion for regional fruit and vegetables displayed in dedicated areas in 86 stores in seven regions.

Companies were more aware of issues around airfreighting than they were last year. However, only Tesco told us of a specific target for airfreight - it has committed to restricting air transport to less than one per cent of its products. Morrisons, Tesco and M&S told us that they are already labelling produce that is airfreighted.

Some retailers told us that they aim to sell 100 per cent British produce in certain categories. However, this is sometimes inconsistent with what was found in store. For example, M&S told us it sells 100 per cent British carrots, but we found some from Israel (organic) and Holland (pre-packaged).

All supermarkets told us they are reducing the CO₂ emissions and energy use of their transportation by improving road haulage efficiency. Some also told us of moves towards 'greener' vehicles, such as Sainsbury's electric online delivery trucks and the Co-op's double-decker trucks with solar panels.

All retailers were aware of the importance of stocking energy-saving light bulbs and some (Asda, Co-op, Morrisons, Sainsbury's and Waitrose) told us of their aim to phase out incandescent bulbs in time for, or before the government's target in 2011. Tesco told us that it had set itself a target of selling ten million energy-saving bulbs in the coming year as part of the 'We're in this together' coalition.

2 Waste: action to reduce, re-use and recycle



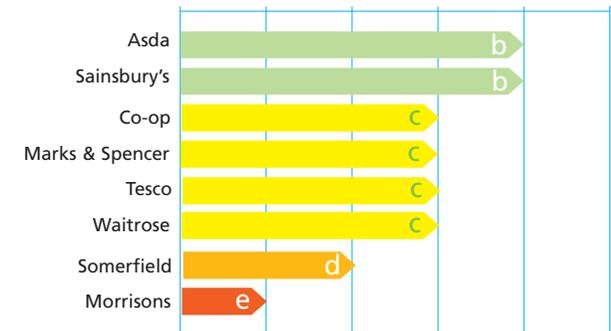
What we did

As in 2006, we set out to measure retailers on how they encouraged and enabled their customers to reduce, re-use and recycle. We have rated supermarkets on:

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

The rating mechanism is the same as in 2006, giving each of the three elements equal weight and also providing commentary on how supermarkets encourage their customers to re-use and recycle in store and on-site.

Retailer ratings for waste



What we found

Carrier bags

The majority of supermarkets have now adopted the government's 2007 voluntary agreement and are working on a basis of an 'industry standard' practice (see panel over page). This code of practice consists of not charging for normal carrier bags; and charging 10p for a 'bag for life'. However, it does not include strong incentives to re-use bags.

Tesco and Somerfield are leading the way by offering incentives to bring back used bags: at the time of the survey, Tesco was offering Clubcard points for the re-use of bags; Somerfield offered customers a free 'bag for life' for bringing back five bags.

Meanwhile Asda has launched a special 'Bag for Life' website (www.asda-bagforlife.co.uk), promoting a green school-voucher scheme for customers who re-use

their bags. Sainsbury's was giving away 'bags for life' free of charge during the survey, but only for one day (27 April 2007.)

The Co-op, M&S and Waitrose are meeting the industry standard but not giving customers any incentive to re-use carrier bags. Looking at what other retailers are doing, this industry standard now appears to be not demanding enough and retailers should be going further.

All of the supermarkets (except Morrisons) offered a 'bag for life', all costing 10p for a standard plastic strong bag that can be replaced when worn out.

We did not find any bag-less checkouts at the stores we visited. Removing bags from the checkouts would be a strong incentive to customers to reduce their use of carrier bags.

Customer information

Overall, we are disappointed to report that there was little progress in recycled material and FSC-certified content in products since the 2006 results. However, we do offer praise to Asda, Co-op, M&S and Sainsbury's for some improvements in their performance with recycled and FSC-certified content. We are also aware of initiatives to increase the use of recycled and biodegradable plastics in packaging, although these were not included in our survey.

M&S and Sainsbury's are leading the way. The majority of M&S cereal packaging declared that it was made from a minimum of 50 per cent recycled material, some even more (85 per cent and 98 per cent). This year, Sainsbury's had more FSC-certified toilet paper and kitchen roll options than in 2006 and its expanded commitment to the FSC logo is good progress.

Asda is also making progress, now offering FSC-certified toilet paper as the main own-brand product. However, we found no declared recycled content of breakfast cereal packaging, so there's still work to do.

There was no improvement for Tesco, Somerfield or Morrisons since 2006.

As in 2006, the stores could do more to promote re-use or recycling. A few supermarkets (notably M&S, Tesco and Somerfield) had some promotional posters relating to waste reduction. However, only the M&S poster with a description of 'Plan A' was described by the researcher as prominent and eye catching.

The Co-op and M&S were the only supermarkets not to have plastic bag recycling points in store.

In some stores, such as Sainsbury's and the Co-op, we found recycling bags for household items such as mobile phones, inkjet printer cartridges and batteries.

Carrier bag agreement

In February 2007 the UK government's Department for Environment, Food and Rural Affairs announced a voluntary agreement was with UK retailers to reduce the overall environmental impact of carrier bags by 25 per cent by the end of 2008¹⁴.

In line with this agreement, retailers will be reducing the environmental impact of bags by:

- ▶ encouraging customers to reduce significantly the number of carrier bags they use;
- ▶ reducing the impact of each carrier bag (for example, by using less material and/or incorporating recycled content); and
- ▶ enabling the recycling of more carrier bags.

Signatories have agreed to:

- ▶ work jointly with government and the organisation Waste and Resource Action Programme (WRAP) to monitor the environmental impact of carrier bags, and to agree a baseline figure from which to measure reduction;
- ▶ work with the government and WRAP to reduce the overall environmental impact of carrier bags by 25 per cent by the end of 2008; and
- ▶ review their experiences by the end of 2008 in order to determine what would be required in order to make a further reduction by 2010.

What the companies told us

All companies told us of their commitment to reducing waste, avoiding excess packaging and supporting recycling. Tesco aims to reduce by 25 per cent, and Morrisons and Co-op by 15 per cent, the amount of packaging on their own-brand products by 2010. With no national standard for labelling packaging with recycling information, some retailers (M&S, Sainsbury's and Waitrose) told us that they are working to develop such a standard to give a consistent message to consumers.

Supermarkets told us that, wherever possible, they will offer recycling facilities in and around their stores, unless a setting prevents it. Tesco has developed automated recycling units that sort plastic, metal and glass so that customers don't have to. The units then shred the waste so more can be stored, reducing the frequency of collection, therefore reducing the environmental impact

of transporting the material. Some retailers told us they are also providing recycling services for batteries, mobile phones and printer cartridges (Sainsbury's and Tesco).

All retailers have signed up to the government's initiative to reduce the overall environmental impact of carrier bags by 25 per cent by the end of 2008. However, some retailers have gone further than this, with Sainsbury's having an objective to reduce the environmental impact of their carrier bags by over 50 per cent by the end of 2008.

Both Sainsbury's and Tesco told us that their home delivery drivers also collect customers' plastic bags to take back to the store and recycle. Tesco have also offered customers the opportunity to collect Green Clubcard points if they choose to accept their home shopping without carrier bags at all, although this was a time-limited offer and is now finished.

The Co-op told us that from May 2007, just after our survey was completed, all own-brand household tissue products will be FSC-certified, including those that are 100 per cent recycled. Sainsbury's also told us that from May 2007, 100 per cent of its own-brand tissue products would either be 100 per cent recycled or from FSC-certified sources.



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3 Sustainable fish

What we did

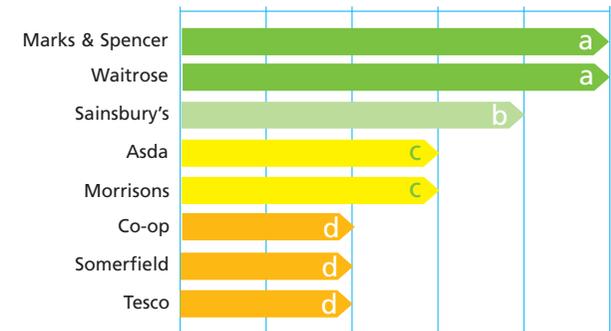
We set out to measure and compare supermarkets on how well they help customers to choose sustainable fish products. After a review of last year's survey, and in discussion with the MSC and Greenpeace, we added a new aspect to our fish indicator. We looked at the fish used in standard own-brand fish fingers as an indicator of whether supermarkets are integrating sustainable fish into everyday products, moving beyond the niche market.

We rated supermarkets on:

- ▷ the availability and promotion of sustainably sourced fish (including those with MSC certification); and the fish species and information for standard own-brand fish fingers.
- ▷ information available about fish sustainability from in-store staff and the customer helpline.

As in 2006, we looked at whether supermarkets were stocking any species that have been identified as 'at risk', specifically: Dover sole, marlin, monkfish, shark (including dogfish), skate and swordfish. However, this information was not included in the rating.

Retailer ratings for sustainable fish



What we found

There have been some improvements in the availability of MSC-certified products in all stores but little noticeable improvement in the promotion of these products in store, either by prominent displays or price promotions, since 2006.

This improvement in availability is, in part, because of a change in some supermarkets' policies, but it is also largely affected by two other factors. These are, firstly, the significant steps taken by the MSC over the past year to widen the number of products and suppliers that have been certified as sustainable. Secondly, it is down to the shift of one large mainstream manufacturer – Young's – in increasing the amount of MSC-certified sustainable fish products they provide to the supermarkets. Young's accounted for the majority of the MSC-certified products we found in our survey (58 out of 75 – over three-quarters of the products).

M&S and Waitrose are leading the way. These two are the only retailers that consistently provided sustainability information and method of catch on the majority of fish products that they sell. All M&S fish ready meals had a 'look behind the label' statement on the back relating to environmental issues and sustainability. Waitrose fish products had a 'sustainably sourced' statement on the packaging.

M&S and Waitrose were also the only supermarkets to provide sustainability information on their fish fingers, though none had MSC certification. Asda did sell MSC-certified 'Smart Price' value fish fingers made from sustainably sourced pollock, with the information prominently displayed on the front of the packet. No MSC-certified products were found in standard own-brand fish fingers in any of the other supermarkets.

Again, as in 2006, we expected customers to be able to ask for information and advice at the fresh fish counter about how and where fish had been caught, and whether it was sustainably sourced. In Waitrose, the researcher noted that she had been very impressed with how well trained and well informed the staff member had been. He was able to discuss MSC certification with the researcher and provided a Waitrose leaflet on fish, *Very useful guide to fish*.

However, in the other retailers, store staff appeared inadequately trained and could not answer questions on the MSC logo or give researchers information on sustainable fish. It was concerning to note that in some supermarkets (such as Asda and Tesco), while staff understood terms such as 'sustainable fish', they gave information very likely to be inaccurate, with sweeping generalisations such as 'it is all sustainable'.

M&S stores did not have a fresh fish counter so the researcher talked to staff at the customer service desk. In the north-east store, the member of staff had good knowledge about the MSC logo and offered more information, unprompted, on the retailers' environmental commitments in its 'Plan A'.

Somerfield did not have a fresh fish counter either, so researchers went to the customer service desk and spoke to the member of staff that dealt with fish products, as well as to the store manager. However, none of these staff could give any information about sustainability or the MSC logo.

Sainsbury's is making good progress and stocked the largest number of own-brand MSC-certified products – about half of all the own-brand MSC-certified products found in the whole survey (eight out of 17). At its fresh fish counter, one of the two MSC-certified products (wild Alaskan salmon) was on special offer

at 25 per cent off. This promotion was prominently displayed.

We found some fish species on sale that are potentially at risk of extinction, including skate (Co-op, Morrisons and Tesco); three types of monkfish (Morrisons, Sainsbury's and Tesco); swordfish (M&S); and Dover sole (Sainsbury's and Tesco). Tesco sold the most types of potentially 'at risk' species – six products in total.

Customer helplines were generally disappointing and staff could not answer questions on sustainable fish. The exception to this was Waitrose where, just as in the stores, the helpline assistant responded quickly and easily to the questions about fish and sustainability.

The experience of looking at company websites was more varied. Waitrose and M&S provided in-depth, well-presented information. Tesco and Asda also had some good information about their company

policies on their websites. We could find no information on sustainable fish on Somerfield's website.

We know that some supermarkets, such as Morrisons and Asda, are working behind the scenes to increase the sustainability of the fish they sell. However, we feel that supermarkets could be doing more to inform their customers and staff about sustainable fish.

What the companies told us

Sustainable seafood sourcing, as we found last year, is still very much a work in progress. Some retailers have specific targets for their sustainable fish sourcing, such as Asda, M&S and Sainsbury's. M&S says it will ensure that all the fish it sells is MSC-certified or, where such certification isn't available, another equivalent independent standard. Asda has pledged that in three to five years all its own-brand fish

products (fresh and frozen) will be certified by the MSC. Sainsbury's aims to convert all of its top five selling fish species, which last year represented 80 per cent of its sales, to 'green status' by 2010.

All retailers except Somerfield told us of their detailed sustainable fish sourcing policies. Waitrose has developed its own rigorous policy on sustainable fishing in the absence of sufficient MSC-certified fish being available. The retailer makes this information available online and in store through its leaflet, *Very useful guide to fish*. Earlier in 2007, Waitrose came top of the 'Sustainable Seafood Supermarket League Table' issued by the wildlife charity, the Marine Conservation Society¹⁵.

M&S and Morrisons told us they do not sell any fish that are on the list of 35 species to avoid that has been compiled by the Marine Conservation Society. Sainsbury's has developed a red, amber and

green system to assess fish, and doesn't sell any red-rated fish, no matter where it comes from. Waitrose also excludes specific endangered species and explains its reasons to customers on its fish counters and website.



4 Sustainable farming

What is the issue?

As in 2006, we measured and compared supermarkets on how well they encouraged and enabled their customers to choose organic and/or other certified farming methods that use fewer chemicals and promote biodiversity. As with many other sustainability issues dealt with in this report, the presence and use of harmful chemicals are largely invisible to consumers. There would be no way for customers to ‘vote with their feet’ or understand the potential effects of these chemicals, unless supermarkets make them visible through labelling or other information, and therefore available for scrutiny and comparison.

What we did

As in 2006, we measured:

- ▶ the provision and promotion of organic options in ten ‘products of concern for pesticide use’ in the fresh produce sector
- ▶ the promotion of other produce from certified farming methods that use fewer chemicals and promote biodiversity, such as Linking Environment and Farming (LEAF) Marque products; and the communication of pesticide reduction policies.

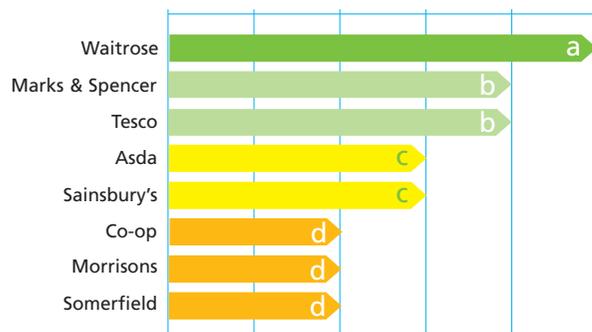
As in 2006, our researchers recorded information about the following ten products on sale in each supermarket, chosen with advice from the independent pesticides charity, the Pesticide Action Network:

- ▶ apples
- ▶ bananas
- ▶ bread
- ▶ celery
- ▶ cocoa/hot chocolate
- ▶ lettuce (whole)
- ▶ oranges
- ▶ pears
- ▶ potatoes
- ▶ tea.

Researchers recorded how many varieties of each food type were available, how many were organic or LEAF-Marque certified, and which products were prominently displayed or on special promotion.

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-Marque options and customer information (including pesticide policies) on conventional produce.

Retailer ratings for sustainable farming



What we found

Our researchers noted that, in general, there was very little choice when it came to organic options in most categories and in most stores. The pattern was usually one of abundant choice in the non-organic varieties, and one or two organic options that were rarely on price promotion.

For example, in the bread and tea categories, some stores did have a selection of organic options available, but these options were sometimes swamped by the sheer variety, range of flavours, pack-sizes and other options that competed for attention. There was disappointingly little progress across the majority of supermarkets, with Waitrose, Tesco and Asda being the only exceptions.

There was little promotion of the benefits of organic farming, nor of the environmental benefits that might act as an incentive to select organic options – even less than in

2006. However, there are some examples where supermarkets gave their customers an indication of their policies and practices in this area.

For example, the Co-op has a pesticide declaration on its packed salad, stating ‘conventionally grown; reducing, banning and controlling pesticide use’. All of the organic fruit and vegetables in Morrisons were displayed with a sign ‘fruit and vegetables grown without using artificial fertilisers’ and organic food was promoted as ‘a healthier choice’.

We found that Waitrose was taking the lead in the ten products we surveyed, and it has increased the amount of organic and LEAF-Marque certified produce in its stores from 19 per cent to 23 per cent, approaching our target of 25 per cent of products from sources certified as low-chemical farming.

Tesco has increased the number of organic lines it sells, from 16 per cent to 20 per cent and Asda has

increased its organic lines from ten to 18 per cent in 2007.

The proportion of organic lines in Sainsbury's had decreased in 2007, from 21 per cent in the categories surveyed, to 12 per cent. Morrisons and the Co-op have also lost some ground, reducing the amount of organic produce available from eleven per cent to nine per cent, and 13 per cent to nine percent respectively. These figures reflect the fact that there were no organic options available in some product categories where there previously had been.

Somerfield has increased the number of its organic lines from four per cent to seven per cent of the categories we surveyed. Although this is still the lowest level in all of the retailers surveyed, it does show progress.

What the companies told us

Many retailers told us about their targets for increasing sales of organic food. M&S aims to triple its sales; Sainsbury's aims to increase sales by 20 per cent, Morrisons by 40 per cent. The Co-op states that it has a clear strategy for increasing its focus on organics. Asda told us that it is Britain's fastest growing organic retailer, having more than doubled its range of organic product lines in the last eighteen months, and the retailer states that it will have 1,000 products by the end of 2007. Waitrose also has a wide range of organic products, with over 2,000 lines.

Several retailers have farm assurance and pesticide reduction networks. Waitrose told us that all growers who wish to sell their produce to Waitrose are asked to become members of an assurance scheme, which has a heavy emphasis on pesticide controls.

Tesco told us that it has developed a scheme called 'Nature's Choice', which puts some controls on pesticide use. All 12,000 growers that supply Tesco must be registered and comply with its standards. M&S has developed a pesticide residue reduction network that has begun to work with 40 suppliers. Somerfield is working with the Assured Produce Scheme (an industry-wide initiative addressing issues related to the production of fruit, salads and vegetables), to promote alternatives to routine pesticide use.

Sainsbury's told us that it will seek to challenge the demand for cosmetic perfection in fruit and vegetables by showing customers that a reduction in pesticides can often result in less uniform-looking produce. It is also working with the Operation Bumblebee campaign, to help reverse the decline of the bumblebee. This campaign encourages farmers and growers to set up habitats for bumblebees by sowing and managing uncropped areas within fields.

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