

# Swarming the Aisles

## RATING TOP RETAILERS ON BEE-FRIENDLY AND ORGANIC FOOD



## Executive Summary

Bees and other pollinators are responsible for one in three bites of food we eat. Without them, grocery stores would run short of some of our most important and nutritious foods, from nuts and berries to tomatoes and coffee. Bees contribute an estimated \$20 billion to the U.S. economy and \$217 billion to the global economy.

But pollinators are in great peril, as their populations are declining around the world. Forty percent of all pollinating species are on the brink of extinction. A growing body of scientific evidence points to the world's most widely-used insecticides, neonicotinoids, as a leading factor in pollinator declines, and glyphosate, the most widely used herbicide worldwide, as a key culprit in monarch declines.

To protect pollinators, we must eliminate pollinator-toxic pesticides from our farming systems and expand pollinator-friendly organic farming that is healthier for bees, butterflies, people and the planet.

Organic farms support 50 percent more pollinator species than conventional farms while also protecting and regenerating the water, soil and other resources that we need to produce healthy food for generations to come.

**80 percent of Americans believe it is important to eliminate neonicotinoids from agriculture. Among Americans who grocery shop for their household, 73 percent believe it is important for grocery stores to sell food grown without neonicotinoids, and 65 percent would be more likely to shop at a grocery store that has formally committed to eliminating neonicotinoids.**

Across the country consumer demand for organic food is skyrocketing, concern about pesticides is mounting, and the need to expand regenerative farming systems is more pressing than ever. Since the 1990's, organic food sales in the United States have shown double-digit growth and have generally exceeded 10 percent growth even since the downturn in the American economy in 2008. The total U.S. organic sales were \$43.3 billion in 2015, and of that, \$39.7 billion were organic food sales, up 11 percent from the previous year.

Yet, less than one percent of total U.S. farmland is in organic production. Expanding organic farming in the U.S. presents a huge opportunity to protect pollinators, deliver economic benefits for America's farmers and generate major conservation benefits for our nation, but farmers will need policies and market opportunities to support their transition.

Food retailers have a crucial role to play in advancing a sustainable food system that protects the wellbeing of pollinators, people and the planet. Their policies and purchasing practices can support farmers who are using fewer pollinator-toxic pesticides and are practicing organic and other sustainable methods.

Changes in the food retail industry to reform supply chain practices to be more sustainable have been met favorably by consumers. A 2016 YouGov Poll commissioned by Friends of the Earth and SumOfUs, found that 80 percent of Americans believe it is important to eliminate neonicotinoids from agriculture. Among Americans who grocery shop for their household, 73 percent believe it is important for grocery stores to sell food grown without neonicotinoids, and 65 percent would be more likely to shop at a grocery store that has formally committed to eliminating neonicotinoids instead of their usual grocery store (if prices and distance were the same). The poll also revealed that 59 percent of American grocery shoppers believe it is important for grocery stores to sell organic food, and 43 percent would be more likely to

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shop at a grocery store that sells more organic food than their current usual grocery store.

In this report, Friends of the Earth evaluated food retailer's policies and practices regarding organics, pollinator protection and pesticide reduction. To create this industry scorecard, which highlights industry leaders and laggards, we conducted a retailer survey (see Appendix III) and reviewed publicly available information from 20 of the largest food retailers in the U.S., as ranked by total U.S. sales.

**Few major food retailers have adopted clear goals or metrics outlining policies to significantly increase organic food offerings in the future.**



The results of our analysis show that, while consumer demand for organic and sustainable, pesticide-free food items is increasing and major food retailers have started to increase their organic food offerings, few major food retailers have adopted clear goals or metrics outlining policies to continue to significantly increase organic food offerings in the future. More than half of these retailers do not publicly disclose company offerings and sales of organic food. In particular, few retailers demonstrate dedication to providing an abundance and wide variety of domestically produced organic foods. We also found that the vast majority of retailers have not adopted policies to eliminate or reduce pollinator-toxic pesticides from their company supply chains to protect bees and other pollinators essential to food production:

- Most top U.S. food retailers do not have a publicly available policy to reduce or eliminate pesticide use to protect pollinators. Of the top 20 food retailers, 17 received an “F” in this category. Only Aldi, Costco and Whole Foods received grades of “B” or “C” in this category.
- Four of the top food retailers, Albertsons, Costco, Target and Whole Foods, have adopted a publicly available company policy or outlined a publicly available company metric or goal regarding commitment to increase overall certified organic food offerings and disclose data on the current percentage of organic offerings or organic sales.
- In addition to Albertsons, Costco, Target and Whole Foods, three of the top food retailers, Aldi, Food Lion (part of the Delhaize Group) and Kroger disclosed data on the current percentage of organic offerings or organic sales.
- Nine of the 20 retailers received “C” grades in the “organic policy” category. These retailers outlined the number of organic products offered at the store and/or define the term “organic” on their website; however, they do not publicly disclose the current percentage of organic offerings or sales or have a publicly available commitment to increase overall certified organic food offerings.
- Four of the retailers have not adopted any policies regarding certified organic food, do not mention certified organic food in any publicly available sources or information regarding the topic isn’t available in other publicly available sources.
- Four of the retailers, Costco, Target, Walmart and Whole Foods responded to Friends of the Earth surveys, calls and letters and disclosed in writing and via other communications all relevant information.
- Sixteen of the top food retailers were predominately unresponsive to our requests for information via surveys, calls and

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letters; primary sources of information for this scorecard include publicly available information, including company websites, company annual reports, SEC filings, corporate social responsibility and sustainability reports, press coverage and industry analyses.

Friends of the Earth encourages food retailers to create pollinator-friendly policies, phase out pollinator-toxic pesticides in company supply chains and increase offerings of USDA certified organic food and beverages with an emphasis on sourcing from domestic, regional and local producers. We also seek to promote greater transparency about sustainable purchasing policies in the U.S. food retail industry and to empower consumers with information they can use to make pollinator-friendly purchases.



## Recommendations for Food Retailers:

- Establish a pollinator protection policy that includes the phase out of pollinator-toxic pesticides, including neonicotinoids and glyphosate, in the company's supply chain, and encourage suppliers to employ alternative pest management strategies that focus on pest prevention through cultural, biological, structural and mechanical means and the use of least-toxic alternatives

(approved for organic production or exempt from federal registration), as a last resort. See attachment for a list of pesticides of special concern.

- Publicly disclose current organic offerings or sales.
- Increase USDA certified organic food and beverages to 15 percent of overall offerings by 2025, prioritizing domestic, regional and local producers.
- Support government and market initiatives to help farmers transition to organic production.
- Publicly disclose company policies and progress related to these actions.

## Recommendations for Individuals:

- **Take action and raise your voice locally:** Let your local food retailer know you want to purchase food grown without pollinator-toxic pesticides and support retailers that prioritize offering organic food and beverages.
- **Buy pollinator-safe food:** Avoid buying food grown with pollinator-toxic pesticides and prioritize purchasing organic food and beverages.
- **Support public policies** that eliminate use of neonicotinoids, glyphosate and other pollinator-toxic pesticides and that support the expansion of organic and ecological farming in the U.S.
- **Join Friends of the Earth's BeeAction campaign** at [www.foe.org/beeaction](http://www.foe.org/beeaction).

*For a full set of recommendations for retailers, institutional purchasers, cities, counties, states, the EPA, Congress and consumers, along with all findings and methodology, please see the full report which is available at [www.foe.org/beeaction](http://www.foe.org/beeaction).*



## Food retailer grades

| Food Retailer   | Organic Offerings and/or Policy | Pollinator Protection Policy | Transparency | Final Grade |
|---|---------------------------------|------------------------------|--------------|-------------|
|    | A                               | F                            | C            | C+          |
|    | B                               | C                            | D            | C+          |
|    | A                               | C                            | A            | A           |
|    | C                               | F                            | C            | C-          |
|    | B                               | F                            | C            | C           |
|    | C                               | F                            | C            | C-          |
|    | C                               | F                            | C            | C-          |
|    | C                               | F                            | C            | C-          |
|  | B                               | F                            | C            | C           |
|  | C                               | F                            | C            | C-          |
|  | C                               | F                            | C            | C-          |
|  | C                               | F                            | D            | D+          |
|  | C                               | F                            | C            | C-          |
|  | F                               | F                            | F            | F           |
|  | D                               | F                            | F            | D-          |
|  | A                               | F                            | B            | B-          |
|  | D                               | F                            | F            | D-          |
|  | F                               | F                            | F            | F           |
|  | C                               | F                            | A            | C+          |
|  | A                               | B                            | A            | A           |

## **Key findings include:**

- Most top U.S. food retailers do not have a publicly available policy to reduce or eliminate pesticide use to protect pollinators. Of the top 20 food retailers, 17 received an “F” in this category. Only Aldi, Costco and Whole Foods received grades of “B” or “C” in this category.
- Four of the top food retailers, Albertsons, Costco, Target and Whole Foods, have adopted a publicly available company policy or outlined a publicly available company metric or goal regarding commitment to increase overall certified organic food offerings and disclose data on the current percentage of organic offerings or organic sales.
- In addition to Albertsons, Costco, Target and Whole Foods, three of the top food retailers, Aldi, Food Lion (part of the Delhaize Group) and Kroger disclosed data on the current percentage of organic offerings or organic sales.
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- Four of the retailers have not adopted any policies regarding certified organic food, do not mention certified organic food in any publicly available sources or information regarding the topic isn’t available in other publicly available sources.
- Four of the retailers, Costco, Target, Walmart and Whole Foods responded to Friends of the Earth surveys, calls and letters and disclosed in writing and via other communications all relevant information.
- Sixteen of the top food retailers were predominately unresponsive to our requests for information via surveys, calls and letters; primary sources of information for this scorecard include publicly available information, including company websites, company annual reports, SEC filings, corporate social responsibility and sustainability reports, press coverage and industry analyses.

## **How companies shape up**

Information from companies for each grading category in this section and throughout the report comes from companies’ responses to the survey, follow-up calls and emails, as well as public statements, publicly available information on retailer websites, corporate social responsibility reports, annual reports, SEC filings and media coverage. The report’s authors encourage food retailers to contact them directly with additional information concerning policies and practices related to organics, pollinators and reduction of pesticides, and to make such information publicly available.

