

Swarming the Aisles

RATING TOP RETAILERS ON BEE-FRIENDLY AND ORGANIC FOOD





Acknowledgements

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About Friends of the Earth:

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Table of Contents



Executive Summary	4
Introduction	8
The Industry	10
Sustainability in the food retailer sector.....	12
Consumer trends.....	13
Organic supply in supermarkets.....	14
Need for increased U.S. organic production.....	15
Pollinators and pesticides: A deadly combination.....	15
Leading retailers seek to protect pollinators.....	17
Organic agriculture: A key solution to the pollinator problem.....	18
Organic agriculture: Protecting much more than just pollinators.....	19
Results	20
Food retailer grades.....	22
How companies shape up.....	23
Recommendations	30
Conclusion	32
Appendices	34
Appendix I: Methodology.....	34
Appendix II: Rubric.....	35
Appendix III: Survey questions.....	38
Appendix IV: Resources for retailers.....	40
References	45

Executive Summary

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

Executive Summary

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

Executive Summary

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.

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.



Introduction



Organic farms support 50 percent more pollinator species

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. But pollinators are in great peril, as their populations are declining around the world. 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,¹ while also protecting and regenerating the water, soil and other resources that we need to produce healthy food for generations to come.

Across the country, consumer demand for organic food is skyrocketing,² concern about pesticides is mounting and the need to expand regenerative farming systems is more pressing than ever. Yet less than one percent of total U.S. farmland is in organic production.³ This report demonstrates that 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 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. In this report, Friends of the Earth evaluates food retailer 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.

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.

The Industry



The food retail industry has enormous power to shape agricultural and supply chain practices in the U.S. and around the world. In 2014, this industry, consisting of grocery stores, drug stores, convenience stores, mass merchandisers and food service facilities, sold \$5.27 trillion in retail and food service sales.⁴



The supermarket and grocery store industry comprises the largest food retail market in the U.S.,⁵ accounting for roughly \$600 billion in annual revenue from 65,000 stores. In 2015, supermarkets employed 3.4 million people, more than 1 percent of the U.S. population.⁶ Globally, grocery stores and supermarkets sell more than \$2 trillion annually,⁷ primarily selling fresh fruits and vegetables, frozen foods, fresh and prepared meat, poultry and seafood, and dairy products.⁸

Sales trends demonstrate increasing concentration among U.S. food retailers due to

mergers, acquisitions, divestitures and internal growth. The 50 largest food retailers in the U.S. generate approximately 70 percent of revenue in this sector.⁹ Food sales by the top retailers increased by 39.9 percent from 1993 to 2013 when retailers reported gross earnings of \$449.3 billion.¹⁰ In 2015, 20 of the largest food retailers accounted for roughly \$658.3 billion in sales.

Of the top 10 food retailers in the U.S., four are not traditional supermarkets. Walmart and Target are discount “big box” retailers and CVS and Walgreens are drugstores, but these companies’ food sales are greater than conventional operators.¹¹ The growth of food sales from non-traditional operators stems from the growth of supercenters, warehouse club stores and discount retailers, including dollar stores and drugstores, which have increased their food sales since the late 1990’s.¹²

Table of 20 of the largest food retailers:

Supermarket	2015 Revenue (Billions)	Number of stores in the U.S.
 Walmart	\$161.00 ¹³	5,249 ¹⁴
 Kroger	\$108.47 ¹⁵	2,778 ¹⁶
 COSTCO WHOLESALE	\$91.5 ¹⁷	698 ¹⁸
 Albertsons	\$58.73 ¹⁹	2,200+ ²⁰
 SAFEWAY	\$58.73 ²¹	1,326 ²²
 Publix	\$32.36 ²³	1,122 ²⁴
 StopsShop	\$26.32 (Parent) ²⁵	405 ²⁶
 H-E-B	\$23.00 ²⁷	329 ²⁸
 CVS pharmacy	\$20.1 ²⁹	9,600 ³⁰
 Save a lot food stores	\$17.53 (Parent) ³¹	1,361 ³²
 meijer	\$16.10 ³³	200 ³⁴
 FOOD LION	\$16.00 (Parent) ³⁵	1,110 ³⁶
 TARGET	\$15.50 ³⁷	1,797 ³⁸
 WHOLE FOODS MARKET	\$15.39 ³⁹	435 ⁴⁰
 TRADER JOE'S	\$13.00 ⁴¹	453 ⁴²
 Walgreens	\$10.70 ⁴³	8,173 ⁴⁴
 ALDI	\$10.10 ⁴⁵	1,500+ ⁴⁶
 GIANT EAGLE	\$9.50 ⁴⁷	218 ⁴⁸
 HyVee	\$9.30 ⁴⁹	240 ⁵⁰
 RITE AID	\$3.7 ⁵¹	4,561 ⁵²

Sustainability in the food retail sector

In response to increased competition in the marketplace and changing consumer demands, retailers continuously work to distinguish themselves via product offerings and demonstrated leadership in sustainability. Sustainability initiatives can help to both

maximize economic performance and meet consumer demand while embodying the retailer's commitment to protecting the planet.

For this report, Friends of the Earth analyzed and compared sustainability standards and policies adopted by 20 of the top food retailers. We found that the following five sustainability

The Industry

initiatives were most commonly adopted and made publicly available via the company website: energy, waste and recycling, seafood, animal welfare and palm oil. We found that, on average, top food retailers were less likely to have adopted publicly available sustainability policies and initiatives about how and where food offerings grow.

Our research did not involve evaluating the efficacy of these policies. Rather, this overview is meant to map what the food industry deems important in the realm of sustainability and environmental protection.

Consumer trends

A growing number of consumers are seeking to protect the health of their families, communities and the environment by “voting” with their dollars.¹²⁸ Studies demonstrate that 55 percent of people around the globe are prepared to pay more for products and services from companies that are committed to positive social and environmental impact.¹²⁹ Similarly, more than 50 percent of consumers in the United States are prepared to pay more for healthier products, including organic.¹³⁰

Table: Top five most commonly adopted sustainability policies by leading food retailers

Food retailer	Energy	Waste	Seafood	Animal Welfare	Palm Oil	Total
Aldi US	X ⁵³	X ⁵⁴	X ⁵⁵	X ⁵⁶	X ⁵⁷	5
Albertsons		X ⁵⁸	X ⁵⁹	X ⁶⁰	X ⁶¹	4
Costco	X ⁶²	X ⁶³	X ⁶⁴	X ⁶⁵	X ⁶⁶	5
CVS	X ⁶⁷	X ⁶⁸		X ⁶⁹	X ⁷⁰	4
Food Lion	X ⁷¹	X ⁷²	X ⁷³	X ⁷⁴	X ⁷⁵	5
Giant Eagle	X ⁷⁶	X ⁷⁷	X ⁷⁸			3
H-E-B	X ⁷⁹	X ⁸⁰	X ⁸¹	X ⁸²		4
Hy-Vee	X ⁸³	X ⁸⁴	X ⁸⁵			3
Kroger	X ⁸⁶	X ⁸⁷	X ⁸⁸	X ⁸⁹	X ⁹⁰	5
Meijer	X ⁹¹		X ⁹²			3
Publix	X ⁹³	X ⁹⁴	X ⁹⁵	X ⁹⁶		4
Rite Aid	X ⁹⁷	X ⁹⁸				2
Safeway	X ⁹⁹	X ¹⁰⁰	X ¹⁰¹	X ¹⁰²	X ¹⁰³	5
Save-A-Lot	X ¹⁰⁴	X ¹⁰⁵				2
Stop & Shop	X ¹⁰⁶	X ¹⁰⁷	X ¹⁰⁸		X ¹⁰⁹	4
Target	X ¹¹⁰	X ¹¹¹	X ¹¹²	X ¹¹³	X ¹¹⁴	5
Trader Joe's			X ¹¹⁵			1
Walgreens	X ¹¹⁶	X ¹¹⁷				2
Walmart	X ¹¹⁸	X ¹¹⁹	X ¹²⁰	X ¹²¹	X ¹²²	5
Whole Foods	X ¹²³	X ¹²⁴	X ¹²⁵	X ¹²⁶	X ¹²⁷	5
Total	18	18	16	13	11	

The Industry

Growing demand for organic food and beverages is one of the biggest consumer trends. Since the 1990's, organic food sales in the U.S. have shown double-digit growth and have exceeded 10 percent growth even since the downturn in the American economy in 2008.¹³¹ 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.¹³²

Many consumers view food as a way to manage health and mitigate health risks.¹³³ Eighty-one percent of U.S. families report that they purchase organic at least sometimes,¹³⁴ citing the top two reasons as avoiding pesticides and protecting the health of themselves and their children.¹³⁵ Fifty percent of Americans are concerned about chemicals in their food, and 48 percent are concerned about pesticide residues.¹³⁶

Produce and dairy are the most popular organic food categories.¹³⁷ More than half of all U.S. households purchase organic produce, accounting for 36 percent of the organic market and almost 13 percent of all produce sold in the U.S. Sales of organic produce have been growing by more than 25 percent annually since 2011 and reached \$13 billion in 2015.¹³⁸ Organic fruit sales jumped by 123 percent last year while organic vegetable sales jumped by 92 percent. Products that are particularly popular among consumers include: organic bananas — up more than 30 percent from last year and now a \$165 million market; organic vegetables such as kale, peeled carrots and ready-to-cook squash — up 54 percent and totaling a nearly \$150 million market this past year; organic blackberries — up 61 percent in the last year; and organic pink lady apples — up 96 percent from the previous year.¹³⁹

There is also growing consumer demand for locally grown food, based, in part, on a desire for increased freshness and transparency in the supply chain.¹⁴⁰ Consumers want to know where their food is produced. In 2015, an industry survey found that 53 percent of adults sought locally grown or produced foods. Sixty percent

of consumers believed local foods are fresher and 44 percent believed they taste better.¹⁴¹ Some food retailers are responding to this trend by adopting “local sourcing” sustainability policies. For example, Whole Foods has a local partnerships and sourcing program to offer their customers products grown, manufactured or crafted within state lines.¹⁴² Whole Foods also profiles local vendors on its website so its customers can orient themselves toward food produced in their region.¹⁴³



Organic supply in supermarkets

Food retailers are working hard to meet booming demand for organic food.¹⁴⁴ Since 2012, more than 90 percent of retailers have increased the number of organic foods they sell. The vast majority of organic food, 93 percent, is sold in conventional supermarkets.¹⁴⁵

Retailers including Target, Whole Foods and the Delhaize Group, which owns Food Lion and Hannaford stores in the U.S., have worked to increase offerings of organic food. The Delhaize Group saw a 40 percent increase in organic product sales between 2014 and 2015.¹⁴⁶ In 2012, Target set a goal to increase its organic food and beverage offerings by 25 percent by the end of 2017.¹⁴⁷

Some retailers are taking a step beyond simply purchasing more organic products and are actively working with farmers to increase their capacity to grow to organic standards. For example, Whole Foods offers a loan program for “small, local, independent producers to help them expand their businesses,” with a

preference given to small organic farms.¹⁴⁸ Costco is working with farmers and food companies in the U.S. and abroad to help them buy land and equipment to meet their customers' demand for organic.¹⁴⁹

Need for increased U.S. organic production

Expanding organic farming in the U.S. presents a huge opportunity to deliver significant economic benefits for America's farmers and rural communities and major conservation benefits for our nation.¹⁵⁰ Yet, retailers and manufacturers are increasingly looking to foreign producers to satisfy Americans' demand for organic food. Less than one percent of total U.S. cropland is certified organic,¹⁵¹ and less than two percent of U.S. public agricultural research dollars go to organic and biologically diversified farming.¹⁵² The U.S. accounts for 44 percent of the global organic market but just five percent of global farmland under organic production.¹⁵³

Data demonstrate that U.S. farmers are interested in shifting to organic, but they will need policies and market opportunities to help them do so. The number of organic farmers in

the U.S. increased by nearly 300 percent since 2002¹⁵⁴ and grew 12 percent from 2014-2015 – the highest rate of increase since 2008.¹⁵⁵ This rapid increase is a result of consumer demand as well as increased federal support for organics, which rose from \$20 million in the 2002 U.S. farm bill to \$167.5 million by 2014.

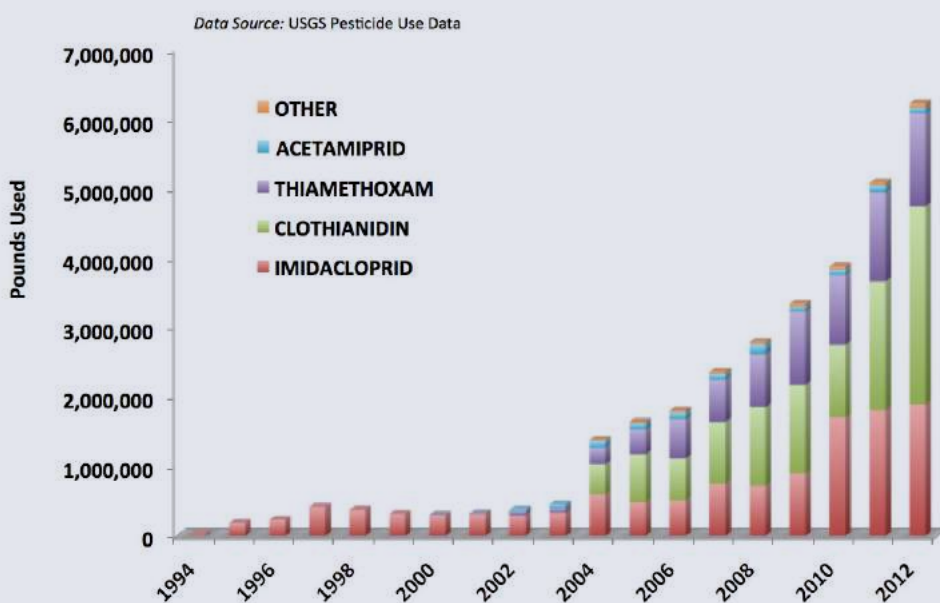
Pollinators and pesticides: A deadly combination

Pollinators are one of the key foundations to global agriculture. About three-fourths of the world's food crops depend on pollination by insects and other animals.¹⁵⁶ Bees alone are essential to the production of one out of every three bites of food we eat.¹⁵⁷ In fact, 71 of the 100 crops that provide 90 percent of the world's food – from almonds to tomatoes to strawberries – are pollinated by bees.¹⁵⁸ Honeybees, in particular, contribute an estimated \$20 billion to the U.S. economy¹⁵⁹ and \$217 billion to the global economy.¹⁶⁰ Globally, between \$235 billion and \$577 billion worth of annual global food production relies on direct contributions by pollinators.¹⁶¹

Unfortunately, 40 percent of all pollinating species, including bees and butterflies, are on the brink of extinction.¹⁶² A growing body of scientific evidence points to pesticides as a leading factor in pollinator declines. The world's most widely-used insecticides, neonicotinoids (neonics), are a primary culprit in recent bee declines. These insecticides are used on 140 crops, and the majority of corn and a large percentage of soy, wheat and canola seeds are coated with the pesticide.¹⁶³

Plant roots readily absorb these water-soluble pesticides which are transported systemically

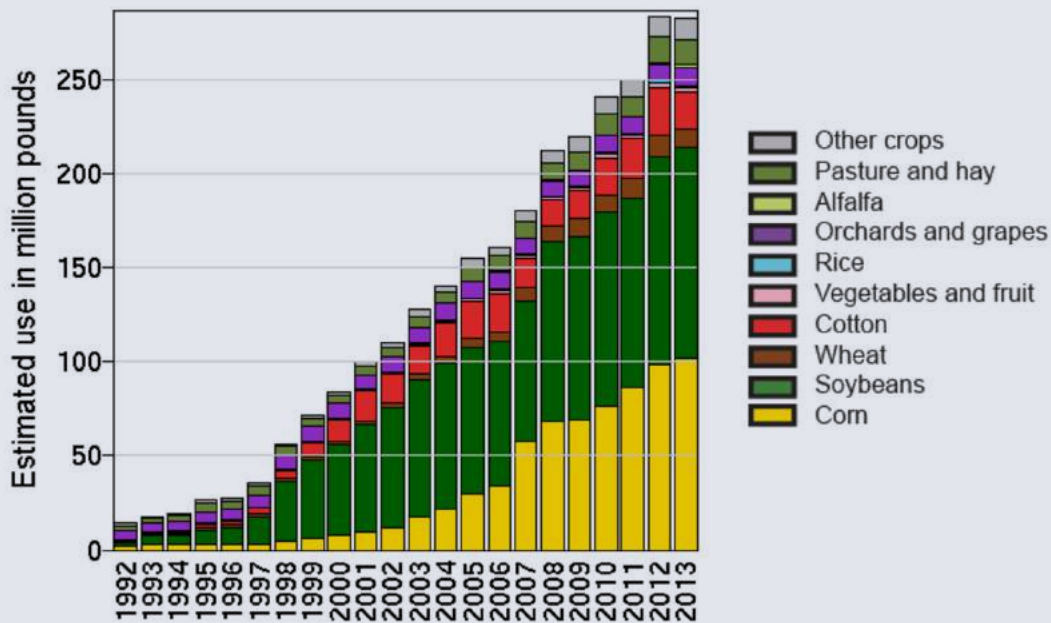
Trends in Use of Neonicotinoid Insecticides in the U.S. 1994-2012



Neonicotinoid use skyrocketed from nearly 0 pounds in 1994 to over 6,000,000 pounds in 2012.



Glyphosate Use by Year and Crop



Data source: USGS. "Pesticide National Synthesis Project."

in the plant's vascular system to other portions of the plant, including roots, pollen, nectar, leaves, stems and fruit.¹⁶⁴ This systemic action results in the exposure of beneficial, non-target insects, such as bees and other pollinators, to potentially lethal doses of these pesticides. Even low levels of exposure can impair foraging abilities and navigation;¹⁶⁵ disrupt learning, communication and memory;¹⁶⁶ reduce fecundity¹⁶⁷ and queen production;¹⁶⁸ and suppress the immune systems of bees,¹⁶⁹ making them more vulnerable to disease and pests. Neonicotinoids are persistent, lasting for years in the soil.¹⁷⁰

These pesticides not only harm bees, but they



also harm many other beneficial organisms essential for natural pest control and sustainable food production, including birds, bats, butterflies, dragonflies, lacewings, ladybugs, earthworms, small mammals, amphibians, aquatic insects and soil microbes — putting food production and the environment in jeopardy.^{171, 172, 173, 174, 175, 176, 177, 178, 179, 180} Twenty-nine independent scientists from across the globe, the Task Force on Systemic Pesticides, drew similar conclusions based on a review of more than 1,100 peer-reviewed studies and called for immediate regulatory action to restrict neonicotinoids.¹⁸¹

Monarch butterflies are also in dramatic decline. In the past twenty years, the monarch butterfly population has declined by 90 percent.¹⁸² Today, experts estimate that monarch butterflies would need nearly a five-fold increase to return to a stabilized population.¹⁸³ The loss of monarchs is tied to glyphosate use, the most widely used herbicide in the world.¹⁸⁴ Glyphosate is an active ingredient in Monsanto's branded Roundup® products.¹⁸⁵ Across the U.S. Midwest, millions of acres of land are planted with Roundup Ready® corn and soybeans that have been genetically

engineered to be tolerant to glyphosate, allowing farmers to spray this herbicide more frequently. In a toxic cycle, increased use of glyphosate has led to rising levels of weed resistance which, in turn, has spurred increased use of glyphosate and other herbicides. The proliferation of glyphosate use on crops located along the monarch butterfly’s migration route has virtually wiped out milkweed — the only food young monarch caterpillars eat.

Unsustainable pollinator loss in the U.S. has sparked action by more than 100 universities, cities, states and businesses to take steps to restrict neonicotinoid use.¹⁸⁶ Similarly, schools, parks, cities and countries around the world have restricted glyphosate due to its impact on the environment and human health.

Leading retailers seek to protect pollinators

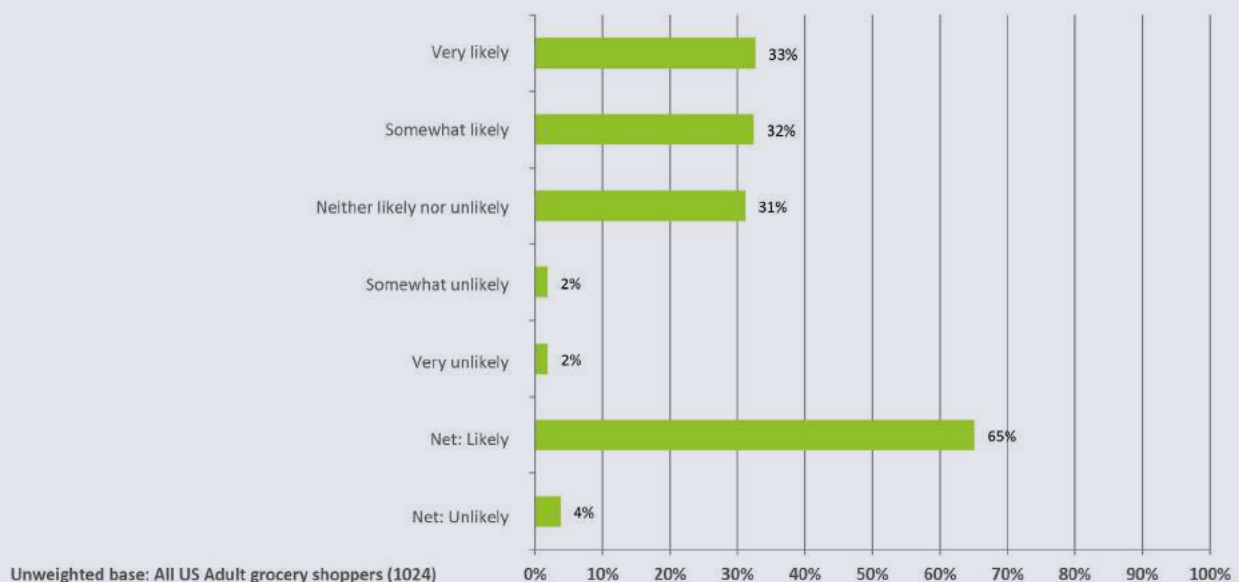
Luckily, there are indications that the food retail sector is beginning to join the movement to reduce and eliminate the use of toxic pollinator-harming pesticides. Leading supermarkets and

food companies have announced purchasing policies and commitments regarding pollinator protection and pesticide reduction. Aldi, a German supermarket chain, became the first major retailer to ask its German and Dutch fruit and vegetable suppliers to stop using eight pesticides hazardous to bees.¹⁸⁷ Aldi also announced in January 2016 that it is expanding its selection of organic meat and produce in its U.S. stores.¹⁸⁸ In 2014, Whole Foods issued its Responsibly Grown product rating system, which grades fresh fruit, vegetables and flowers as “good, better or best” based on established criteria, including pollinator protection. It encourages its suppliers to eliminate or reduce highly toxic pesticides, including four of the most commonly used neonicotinoid pesticides.¹⁸⁹

Decisions by Whole Foods and Aldi to address pollinator-toxic pesticides in their supply chains have been met favorably by consumers. This finding is consistent with a 2016 YouGov Poll, commissioned by Friends of the Earth and SumOfUs, which found that 80

Likelihood of Shopping at a Grocery Store that Formally Committed to Eliminating Neonics

TSN_q10. Please imagine that a grocery store you do not usually shop at made a formal commitment to eliminate the use of neonics from the food they sold. If distance and prices were not different, how likely or unlikely would you be to shop at this grocery store instead of your usual store?



Source: YouGov 2016 poll commissioned by Friends of the Earth and SumOfUs

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.¹⁹⁰ This poll also found that 65 percent said they would be more likely to shop at a grocery store that had formally committed to eliminating neonicotinoids. According to the poll, 59 percent of American grocery shoppers believe it is important for grocery stores to sell organic food and 43 percent of Americans would be more likely to shop at a grocery store that sells more organic food than their current usual grocery store.

Organic agriculture: A key solution to the pollinator problem

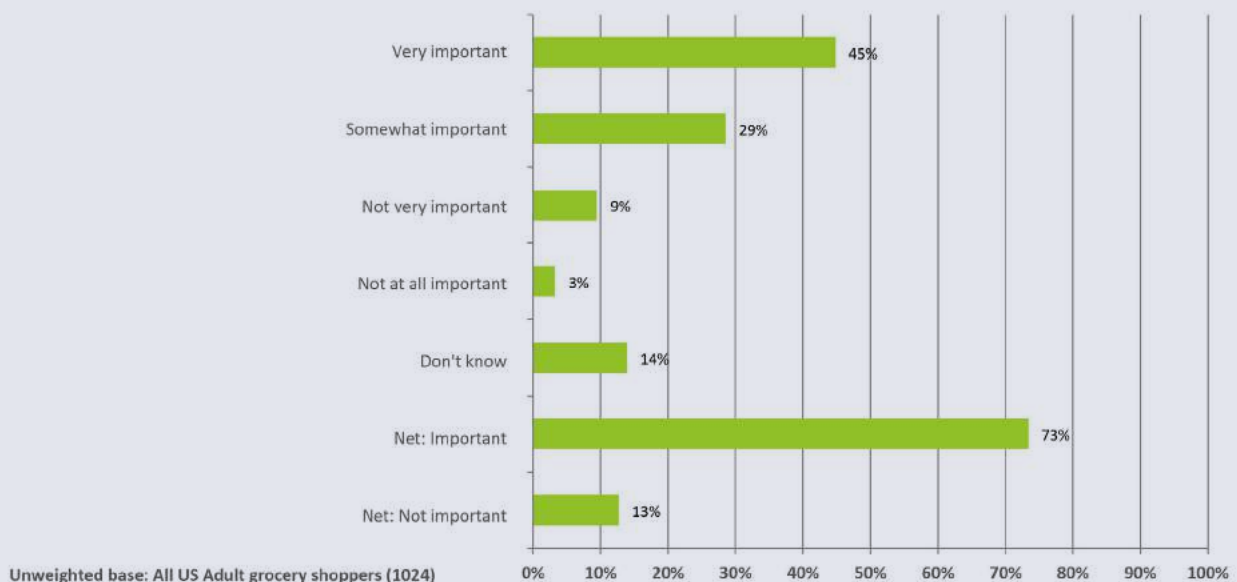
Because organic farmers use ecological rather than chemical methods to address pest issues and are prohibited from using the most lethal and problematic of pesticides, organic farming offers pollinators healthy habitat. On organic farms, pollinators are not just safe — they are welcomed and supported by a toxic-free and food-rich environment. According to

an Oxford University meta-analysis, organic farming supports 50 percent more pollinator species than conventional, chemical-intensive agriculture.¹⁹¹ Other studies have similarly found that organic farm management practices increase the prevalence of pollinator-friendly plants and pollinator diversity, including honeybees as well as native and wild pollinators.^{192, 193, 194}

While conventional agriculture often relies on pollinator-toxic synthetic pesticides to manage pest problems, including neonicotinoids and glyphosate, organic agriculture is prohibited from using such pesticides. Organic certification rules allow the use of some naturally-occurring pesticides (which are mostly derived from plants and microbes), but these pesticides are used only as a last resort: organic certification requires an “Integrated Pest Management” plan that prioritizes first non-chemical and ecological methods of pest control. Non-organic producers face no such requirements to use less-toxic methods of pest control. While non-organic farmers are allowed to use over nine hundred different synthetic pesticide products, organic farmers have restricted access to just twenty-

Importance of Grocery Stores Selling Food Without Neonics

TSN_q9. How important, if at all, do you think it is for grocery stores to only sell food produced without neonics?



Source: YouGov 2016 poll commissioned by Friends of the Earth and SumOfUs



five.¹⁹⁵ What's more, the National Organic Standards Board regularly reviews the list of allowed substances to ensure that they are the least toxic alternatives.¹⁹⁶

Organic farmers pursue many other means of protecting their crops before they resort to this short list of allowed pesticides. These techniques include:

- Maintaining crop diversity and practicing crop rotation in fields to avoid pest buildup;
- Planting “trap crops” that attract pests to sacrificial plants rather than crops destined for sale;
- Providing habitat (such as hedgerows of native plants and flower-laden perennials) that attract a diversity of beneficial insects that predate on pest species.

Organic agriculture: Protecting much more than just pollinators

The science is clear that organic is not only better for pollinators, it is essential to a healthier food system for all: for our health, our families and our communities; for the farmers and farmworkers who grow our food; for the land that provides us with nourishment; the animals we raise to feed us; and the ecosystems that sustain all of life.

Compared with industrial agriculture, organic

farming is less energy intensive¹⁹⁷ and promotes biodiversity.¹⁹⁸ Organic systems provide greater resilience in the face of climate-related weather impacts like drought and floods by improving soil structure and soil water-holding capacity.^{199, 200, 201} By sequestering more carbon in the soil than industrial practices, organic and other conservation-based farming systems are important climate change mitigation strategies.²⁰²

Along with environmental benefits, organic also outperforms industrial agriculture on measures of economic stability and wellbeing.²⁰³ Organic farming systems are more profitable for farmers and boost local economies.²⁰⁴ One study found that in U.S. counties with high levels of organic production, median household incomes are higher and poverty levels are reduced.²⁰⁵ Importantly, organic farming protects the health of consumers, farmers, farmworkers and rural communities by eliminating the use of highly toxic pesticides.²⁰⁶

A series of expert consensus reports over the past decade affirm this evidence and make it clear that ecological approaches to farming are fundamental to feeding all people, now and in the future.²⁰⁷ Not only can organic farming yield enough to feed a growing population, but it also helps to protect and regenerate the ecological basis of food production.^{208,209}

Results

Results

















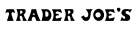



Friends of the Earth conducted this survey and report to determine the state of the marketplace regarding the elimination of pollinator-toxic pesticides and offering organic food in food retailer supply chains. We analyzed publicly available policies and data for the top 20 food retailers in the U.S., as ranked by total U.S. sales, and administered surveys and letters to each of the companies requesting relevant information. To grade these retailers, we compared policies adopted by each company regarding organics (including disclosure of current company offerings and sales of organic food), pollinator protection, reduction of pesticides and transparency. The scoring rubric is located in Appendix II and a full description of the methodology can be found in Appendix I.

The results of our analysis show that, while consumer demand for organic and sustainable

food items free of pesticides 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/or sales of organic food. In particular, few retailers demonstrate dedication to providing an abundance and wide variety of domestically produced organic foods. Our report found that the vast majority of retailers have not adopted policies to eliminate or reduce pollinator-toxic pesticides from company supply chains to protect bees and other pollinators essential to food production.



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.
- 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 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.



Albertsons (Overall grade: C+)



Organic Policy: (Grade: A) Albertsons outlines a clear organic policy and plans for continuing to grow organic offerings across meat, produce, service deli and bakery departments to contribute to strong sales in its 2016 SEC filing.²¹⁰ The company expanded its sales from \$1,410.7 million, or 7.2%, primarily due to a 6.5% increase in customer traffic during fiscal 2014, through an acquisition that allowed the company to enhance its organic offerings.²¹¹

Pollinator Protection Policy: (Grade: F) Albertsons has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Albertsons' relevant store policies are available on in its SEC Filings and on its website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

ALDI U.S. (Overall grade: C+)



Organic Policy: (Grade: B) According to recent press coverage, ALDI U.S. is expanding its selection of fresh and organic meat and produce in 2016.²¹² However, this information was only disclosed via third party and Aldi does not make data on the percentage of organic offerings or its full policy on organic offerings publicly available.

Pollinator Protection Policy: (Grade: C) Aldi announced it will drop products that are produced with eight major pesticides that are harmful to bees: Deltamethrin, Chlorpyrifos, Clothianidin, Cypermethrin, Imidacloprid, Thiamethoxam, Sulfoxaflor and Fipronil. To date, the move is focused primarily on its European stores.²¹³

Transparency: D. Information on relevant company policies or store offerings is only disclosed via third parties, such as via the press and industry research analyses.

Costco (Overall grade: A)



Organic Policy: (Grade: A) According to the CEO of Costco the store, "cannot get enough organics to stay in business day in and day out," so the company announced in 2016 that it is working with farmers to help them buy land and equipment to grow the organic supply chain. The company says it will be expanding the initiative. The company disclosed it is the largest seller of organic products in the U.S. and for fiscal year 2016, sales of organic products are estimated at \$4.5 billion. The store says it will continue to sell organic products and expect the selections and volumes to grow over time.²¹⁴ Costco disclosed it is working to increase overall sales from 8 to 11 percent a year, versus 2 to 2.5 percent for food sales overall.²¹⁵

Pollinator Protection Policy: (Grade: C) Costco has a global pollinator protection policy and will publish it by the end of 2016.²¹⁶

Transparency: (Grade: A) Costco's relevant store policies are available in its Fiscal Year 2015 Annual Report and via press, and a company representative did respond to the Friends of the Earth survey and disclose in writing and all relevant information via other communications.

CVS (Overall grade: C-)



Organic Policy: (Grade: C) In its 2015 Corporate Social Responsibility report, CVS disclosed that it extended its “Fit Choices” initiative. The program seeks to make “better-for-you” choices available in the store. CVS reported the initiative was expanded to include items that are Organic, Sugar-Free, Gluten-Free and Heart Healthy. The program includes 350 selections.²¹⁷ CVS did not distinguish how many of its 350 selections are specifically organic and did not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) CVS has no publicly available policy on pollinators or pesticide reduction. However, CVS utilizes the supply chain compliance tool WERCSmart. WERCSmart monitors product ingredients sold in the store by requiring suppliers to register all ingredient information for products, including pesticides.²¹⁸

Transparency: (Grade: C) Some relevant store policies are available in the company’s Corporate Sustainability Report and on its website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Food Lion (Overall grade: C)



Organic Policy: (Grade: B) Food Lion announced that it is expanding its organic selections through its new “Easy, Fresh and Affordable” advertising campaign.²¹⁹ Food Lion is owned by the Delhaize Group which disclosed in its 2015 Sustainability Report that it increased organic products sales by 40 percent from 2014-2015 and that organic products were 2.3 percent of total food sales.²²⁰ The report didn’t disclose Food Lion specific organic sales or offerings. The Delhaize Group adopted goals to be sustainability leaders by 2020, which includes building sustainability into private brand products, but this policy didn’t outline specific goals regarding organic food offerings.²²¹

Pollinator Protection Policy: (Grade: F) Food Lion has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) The Delhaize Group’s relevant store policies are available in its Sustainability Progress Report 2014 but didn’t disclose Food Lion-specific information. A company representative from the Delhaize Group or Food Lion did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Giant Eagle (Overall grade: C-)



Organic Policy: (Grade: C) Giant Eagle announced that it offers hundreds of organic items and upwards of 75 varieties of organic fruits and vegetables²²² and defines organic on its website.²²³ Giant Eagle did not provide data on percentage of overall offerings and/or sales of certified organic food aside from saying it “offers thousands of organic products” in its 2014-2015 Corporate Social Responsibility Report.²²⁴

Pollinator Protection Policy: (Grade: F) Giant Eagle has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Giant Eagle’s relevant store policies are available in its 2014-2015 Corporate Social Responsibility Report, but Giant Eagle did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Results

Hy-Vee (Overall grade: C-)



Organic Policy: (Grade: C) Hy-Vee announced that it is working to increase the number of organic products on its shelves²²⁵ and defines organic on its website.²²⁶ Hy-Vee did not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Hy-Vee has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Some relevant store policies are available on in the company's website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

H-E-B Grocery (Overall grade: C-)



Organic Policy: (Grade: C) H-E-B grocery launched a new campaign to make organic items, including pantry staples, produce and meat, widely available at affordable prices, which will consist of hundreds of new products²²⁷ and has "hundreds scheduled to hit shelves through the year" according to available data.²²⁸ H-E-B defines organic on its website.²²⁹ H-E-B did not provide data on the percentage of overall offerings and/or sales of certified organic food.

Pollinator Protection Policy: (Grade: F) H-E-B Grocery has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Some relevant store policies are available on the company's website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Kroger (Overall grade: C)



Organic Policy: (Grade: B) Kroger's organic line, Simple Truth®, totaled \$1.5 billion in annual sales in 2015,²³⁰ an increase from about \$1.3 billion in 2014.²³¹ Kroger stocks over 2,000 Simple Truth® or Simple Truth Organic™ items.²³²

Pollinator Protection Policy: (Grade: F) Kroger has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Kroger's relevant store policies are available on its website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Meijer (Overall grade: C-)



Organic Policy: (Grade: C) Meijer disclosed that it offers more than 300 organic products.²³³ Meijer did not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Meijer has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Meijer has some relevant store information available on its website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Results

Publix (Overall grade: **C-**)



Organic Policy: (Grade: C) Publix disclosed that it offers a variety of organic products in its 2010 Super Markets Social and Environmental Stewardship Report²³⁴ and it has been documented in recent news articles that Publix is offering more organic and natural items.²³⁵ Publix did not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Publix has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Publix has some relevant information available on its website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Rite Aid (Overall grade: **D+**)



Organic Policy: (Grade: C) Rite Aid offers a variety of organic products²³⁶ and recent news articles disclosed Rite Aid has worked to expand its RediClinics and remodeled 89 wellness stores, which offer organic food.²³⁷ It does not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Rite Aid has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: D) Information on relevant company policies or store offerings only disclosed via third parties, such as via the press and industry research analyses.

Safeway (Overall grade: **C-**)



Organic Policy: (Grade: C) Safeway defines organic on its website²³⁸ and offers over 300 organic products.²³⁹ It does not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Safeway has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: C) Safeway has some relevant store information available on its website, but a company representative did not respond to the Friends of the Earth survey or disclose in writing all relevant information via other communications.

Save-A-Lot (Overall grade: **F**)



Organic Policy: (Grade: F) Save-A-Lot does not mention certified organic food in any publicly available materials, such as its website, supplier guidelines or corporate social responsibility or sustainability report and no mention of certified organic food and the retailer via third party.

Pollinator Protection Policy: (Grade: F) Save-A-Lot has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: F) Relevant policies and information were not available via official company communications or other publicly available sources.

Stop & Shop (Overall grade: **D-**)



Organic Policy: (Grade: D) Stop & Shop defines organic on its website,²⁴⁰ but does not provide data on the percentage of overall offerings and/or sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Stop & Shop has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: F) Relevant policies and information are not available via official company communications or other publicly available sources.

Target (Overall grade: **B-**)



Organic Policy: (Grade: A) Target set a goal to increase its organic food offerings by 25% by 2017. It achieved the goal two years early and increased its organic offerings by 114 percent since 2012.²⁴¹ In its 2015 Corporate Social Responsibility Report it disclosed it introduced a new program called Made to Matter to offer “leading natural, organic and sustainable brands” and in 2015 updated the program to offer options from 31 brands and more than 200 new and exclusive products.²⁴² Target reports sales for these brands could hit \$1 billion in 2016 and brands featured in the program experienced a 30 percent increase in sales growth. Overall, Target says its growth in the naturals and organics industry grows 1.5 percent faster than the overall market.²⁴³ Further, the Target CEO reports he wants organic items to account for 60 percent of the company’s baby food sales by 2016, up from 40% when he took the reins.²⁴⁴

Pollinator Protection Policy: (Grade: F) Target has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: B) Target has relevant store information available on in its website and a company representative did respond to the Friends of the Earth survey in writing to acknowledge receipt of Friends of the Earth communications, but did not disclose additional information.²⁴⁵

Trader Joe’s (Overall grade: **D-**)



Organic Policy: (Grade: D) Trader Joe’s has one mention of organic on its website.²⁴⁶ It does not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Trader Joe’s has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: F) All relevant policies and other relevant Information are not available via official company communications or other publicly available sources.

Walgreens (Overall grade: **F**)



Organic Policy: (Grade: F) Aside from the products it sells, Walgreens has no mention of organics on its website and does not provide data on the percentage of overall offerings and sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Walgreens has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: F) Relevant policies and information are not available via official company communications or other publicly available sources.

Walmart (Overall grade: **C+**)



Organic Policy: (Grade: C) In its 2015 Global Responsibility Report Walmart disclosed it is introducing low-priced, healthier product lines and affordable organic lines. It launched Great Value Organics in April and now has over 160 products.²⁴⁷ It re-launched Wild Oats in April 2015 with a new, more affordable price point and disclosed it saved its customers \$1.09 billion in Fiscal Year 2015 by offering low prices on fruits and vegetables.²⁴⁸ The CEO of its Sam's Club unit announced during a sales call in June 2015 that it increased its organic offerings by 20 percent since the beginning of the year²⁴⁹ and the company disclosed to Friends of the Earth its organic product sales have almost doubled in the last two years and is one of the largest retailers of organics.²⁵⁰ In April 2016, Walmart announced it will be phasing out its Wild Oats products and offering organic food items under its store brand Great Value.²⁵¹ Wild Oats is a producer of natural and organic foods distributed through partnerships in the United States. Walmart does not provide data on the percentage of overall offerings and/or sales of certified organic food.

Pollinator Protection Policy: (Grade: F) Walmart has no publicly available policy on pollinators or pesticides.

Transparency: (Grade: A) Walmart has some relevant store information available on in its website and a company representative responded to the Friends of the Earth survey and disclosed in writing all relevant information via other communications.

Whole Foods (Overall grade: **A**)



Organic Policy: (Grade: A) Since 2005 Whole Foods' sales of organic have increased by more than 70 percent, and every year the company aims to increase the amount of organic products that it sells.²⁵² In 2015, it is reported Whole Foods sold \$3.6 billion of organic food.²⁵³

Pollinator Protection Policy: (Grade: B) Whole Foods adopted a Responsibly Grown rating system which seeks to protect pollinators from toxic pesticides and reduce pesticide use in produce and prohibits the use of four neonicotinoids on living garden and floral plants for outdoor use, however this policy is not yet store-wide.^{254, 255}

Transparency: (Grade: A) Information on relevant store policies is available via Whole Foods' website, corporate social responsibility or sustainability report, and a company representative disclosed in writing all relevant information via responding to survey or via other communications.



Food retailers have a crucial role to play in advancing a sustainable food system that protects the well-being of pollinators, people and the planet. There is a huge opportunity and need to accomplish these goals by supporting the expansion of organic production here in the United States. Some supermarkets and food retailers are on the way to supporting pollinator protection and organic production (although not necessarily domestic) while others have catching up to do. We recommend that supermarkets and the food retail sector make formal commitments to eliminate pollinator-toxic pesticides in their supply chains and expand sales of organic food with an emphasis on domestic production as quickly as possible.

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 the 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.

Recommendations for Cities, Counties and States:

- **Buy certified organic food and beverages:** Utilize food procurement contracts to purchase organic food and beverages. Develop specifications and insert them into your bid solicitation(s) for these products.
- **Support and pass policies** to eliminate use of neonicotinoids, glyphosate and other pollinator-toxic pesticides. Additionally support policies that incentivize transition to organic production; increase research into

Recommendations

diversified and agroecological production methods; support localized processing and distribution infrastructure; increase access to land for new, beginning and disadvantaged farmers; and educate the next generation of sustainable farmers.

Recommendations for Congress:

- Support and pass the Pollinator Recovery Act of 2016 introduced by Senator Jeff Merkley (D-Ore.). This legislation seeks to emphasize the development and adoption of novel integrated pest and vegetation management practices that reduce the application of pollinator-toxic insecticides and herbicides that can impact pollinator health and the abundance of habitat and forage. Requires the Department of Agriculture to consider regionally appropriate, pollinator-friendly seed mixes when developing and implementing conservation plans for agricultural land holders in areas with highly erodible soils and offers financial and technical assistance for growers to implement a variety of conservation practices and restoration efforts on active and retired lands.
- Support and pass the Saving America's Pollinators Act of 2015 (H.R. 1284) introduced by Representatives John Conyers (D-Mich.) and Earl Blumenauer (D-Ore.). This legislation would suspend seed treatment, soil application or foliar uses of certain neonicotinoid pesticides on bee-attractive plants until all of the scientific evidence is reviewed by the U.S. Environmental Protection Agency and field studies can be done to evaluate both short- and long-term effects of these pesticides on pollinators.
- Support and pass policies that incentivize the transition to organic production; increase research into diversified and agroecological production methods; support localized processing and distribution infrastructure; increase access to land for new, beginning and disadvantaged farmers; and educate the next generation of sustainable farmers.

Recommendations for the U.S. Environmental Protection Agency:

- Suspend the registrations of neonicotinoids and glyphosate for agricultural as well as cosmetic and other uses pending the results of pesticide re-evaluation.
- Require a bee hazard statement on the label of all products containing systemic insecticides toxic to pollinators, including soil drenches and foliar use products.
- Prioritize the systemic insecticides for Registration Review starting in 2016 and ensure inclusion of independent, peer-reviewed research on the acute and chronic effects of systemic insecticides on bees.
- Expedite the development and implementation of valid test guidelines for sub-lethal effects of pesticides on pollinators and require data from these studies for all currently registered and any new pesticides.
- Require testing and reporting of synergistic effects between pesticides in Registration Review to reduce the probability of interactive effects amplifying the toxicity of neonicotinoid insecticides.



Conclusion & Appendices

Conclusion



Top U.S. food retailers have a unique opportunity and responsibility to help make our food system healthier for 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 ecological methods. To help address the massive gap between consumer demand for organic food and domestic supply, food retailers should make it a priority to purchase from local, regional and domestic organic farmers, and when possible,

support public policies that seek to expand organic and ecological farming in the United States. Consumer polls and purchasing trends make it clear that an increasing number of shoppers support companies that are publicly committed to the health and environmental goals. Along with helping to protect pollinators, the major consumer trend toward organic is great news for the health of families, farmers and farmworkers, and the soil, water and other resources we need to feed ourselves now and in the future.

Appendix I: Methodology



Friends of the Earth reached out to more than 75 food retailers in the United States and asked them to respond to a survey regarding supermarket sustainability, organic food, pollinator protection and neonicotinoid pesticides in company supply chains. None of the retailers filled out and returned the survey. See survey in Appendix III. Retailers were given over one month to respond.

After sending this initial survey, we reached out via phone to 11 of the top food retailers to conduct the survey. We spoke to seven out of 11 customer service representative to try to attain the information, but none of the customer service representatives were willing to disclose the information. Four retailers did not have the option to speak to a customer service representative. Of these four companies, three had the option to email the retailer, which we did, and only one responded with a phone call. One of the 11 retailers did not have a customer service number or email option to inquire about the retailer sustainability policies.

For the top 20 food retailers, we attempted to fill the survey out for each retailer with publicly available data. We sent a follow-up letter and one-pager to each of the top 20 retailers to verify the information we attained was correct and gave each retailer an opportunity to clarify any information that we would publish. We made it clear to retailers that we wanted to accurately reflect their adopted store policies. From this letter, three retailers responded.

To grade the top 20 food retailers, as ranked

by total U.S. sales, we compared policies adopted by each company regarding organics, pollinators, reduction of pesticides and transparency. The scoring rubric can be found in Appendix II. We used publicly available information on the internet and any information sent or communicated directly from the company. To find information on our grading criteria, we reviewed retailer websites, Corporate Social Responsibility reports, annual reports, SEC filings and media coverage.

The information collected was used to create a food retailer industry scorecard that assesses the policies and commitments of U.S. food retailers on organic offerings, pollinator protection, pesticide reduction and transparency in their supply chains. The scorecard is intended to help consumers make educated choices about the food they are purchasing and to encourage companies in this industry to improve their sourcing policies. Retailers were given scores or grades based on criteria, described in Appendix II.



Appendix II: Rubric

Organic Policy

A	<ul style="list-style-type: none">• Retailer provides publicly available data on the percentage of overall offerings and/or sales of certified organic food via SEC Filings, Corporate Responsibility Report, or other company pages.• Retailer has adopted a publicly available company policy regarding commitment to increase overall certified organic food offerings.
B	<ul style="list-style-type: none">• Retailer provides publicly available data on the percentage of overall offerings and/or sales of certified organic food via SEC Filings, Corporate Responsibility Report, sustainability report, annual report or other company pages or it is disclosed via third parties, such as the press and industry research analyses.
C	<ul style="list-style-type: none">• Retailer mentions certified organic food in publicly available policies (i.e. defines certified organic) and outlines number of organic products sold at the store, but does not provide publicly available data on the percentage of overall offerings and/or sales of certified organic food. This information is available via SEC Filings, Corporate Responsibility Report, sustainability report, annual report or other company pages or it is disclosed via third parties, such as the press and industry research analyses.
D	<ul style="list-style-type: none">• Retailer has not adopted any policies regarding certified organic food and does disclose data on the percentage of overall offerings and sales of certified organic food. Retailer does mention certified organic food in publicly available communications via SEC Filings, Corporate Sustainability Report, sustainability report, annual report or other company pages or it is disclosed via third parties, such as the press and industry research analyses.
F	<ul style="list-style-type: none">• Retailer does not mention certified organic food in any publicly available materials, such as its SEC Filings, Corporate Sustainability Report, sustainability report, annual report or other company pages and it is not disclosed via third parties, such as the press and industry research analyses.



Appendix II: Rubric

Pollinator Protection Policy

A	<ul style="list-style-type: none">• Retailer has adopted a publicly available store-wide pollinator protection policy that includes a commitment to reduce or eliminate pollinator-toxic pesticides across all food, beverage and non-food product categories.
B	<ul style="list-style-type: none">• Retailer has adopted a publicly available pollinator protection policy that includes a commitment to reduce or eliminate pollinator-toxic pesticides that applies only to certain categories of food products and includes non-food products.
C	<ul style="list-style-type: none">• Retailer has adopted a publicly available pollinator protection policy to reduce or eliminate hazardous pesticide use on non-food or beverage products.
D	<ul style="list-style-type: none">• Retailer has adopted a publicly available pollinator protection policy, but does not have a policy to reduce or eliminate hazardous pesticide use.
F	<ul style="list-style-type: none">• Retailer has no publicly available policy on pollinators or pesticides.

Transparency

A	<ul style="list-style-type: none">• All relevant policies, including offerings and/or sales of organic foods, are detailed and easily accessible on retailer's website, corporate social responsibility or sustainability report, and a company representative is willing to disclose in writing all relevant information via responding to survey or via other communications.
B	<ul style="list-style-type: none">• Partial information on relevant store policies (does not disclose offerings and/or sales of organic foods) are available via retailer's website, corporate social responsibility or sustainability report, and a company representative is willing to disclose in writing all relevant information via responding to survey or via other communications.
C	<ul style="list-style-type: none">• Information on relevant store policies are available via retailer's website, corporate social responsibility or sustainability report, but a company representative is not willing to disclose in writing all relevant information via responding to survey or via other communications.
D	<ul style="list-style-type: none">• Information on relevant company policies or store offerings only disclosed via third parties, such as via the press and industry research analyses.
F	<ul style="list-style-type: none">• All relevant policies and other relevant Information is not available via official company communications or other publicly available sources.

Appendix II: Rubric

Grading Scale awarded per category: Letter and percentage equivalents for grades awarded in each category

Letter Grade	Percentage
A	100
B	89
C	79
D	69
F	59

Final grade awarded: Letter and percentage equivalents for final grades awarded

Final Grade	Percentage
A+	100-97
A	96-93
A-	92-90
B+	89-87
B	86-83
B-	80-82
C+	79-77
C	76-73
C-	72-70
D+	69-67
D	66-63
D-	62-60
F	59-0



Appendix III: Survey questions

Survey questions on supermarket sustainability and organic procurement policies

1. Do you have a policy regarding sustainability in your supply chain?

A. Yes ____ No ____

B. If the answer to #1A is yes, then:

Is the policy available online? If so, please provide the URL:

If not, please provide the policy via email.

2. Do you have a policy regarding organic food in your supply chain?

A. Yes ____ No ____

B. If the answer to #2A is yes, then:

Is the policy available on line? If so, please provide the URL:

If not, please provide the policy via email.

3. If the answer to #2 is yes, then:

A. What is the overall percentage of certified organic food sold at your stores?

B. What percentage of certified organic food sold in your store is from your store brand product line and what percentage is from other brand product lines?

4. Do any of your policies address pollinator protection in your supply chain?

A. Yes ____ No ____

B. If yes, please explain how your policy addresses pollinator protection and what percentage of your supply chain is sourced in accordance with this policy:

C. If the answer to #4A is yes, then:

Is the policy available online? If so, please provide the URL:

If not, please provide the policy via email.

5. Do you have a policy restricting and/or eliminating the use of neonicotinoid pesticides?

A. Yes ____ No ____

B. If yes, please explain how your policy addresses neonicotinoid pesticides and what percentage of your supply chain is sourced in accordance with this policy:

C. If yes, is the policy available on line? If not, please provide the policy.

6. If you answered no to #2, #4, or #5, do you have plans to implement a policy in the future? Please describe, including expected date of the policy.

Appendix III: Survey questions

- 7. What factors currently limit or prevent additional offerings of certified organic food at your stores?**
- 8. What factors currently limit or prevent additional offerings addressing pollinator protection at your stores?**
- 9. What factors currently limit or prevent addressing the use of neonicotinoid pesticides in your supply chain?**
- 10. Is there anything else you would like to tell us about your efforts to improve social and environmental responsibility in your supply chain?**
- 11. Please include company name and best person to be in touch with regarding the survey moving forward.**

Appendix IV: Resources for retailers

Pesticides of Special Concern: Pesticides to Reduce in Food Retailer Supply Chains

Top Ten Registered Pesticides for Acute Toxicity to Honey Bees

Active Ingredient	Chemical Class	Hazard to Bees
Imidacloprid	Neonicotinoid	Acute & chronic toxicity, contaminates forage
Clothianidin	Neonicotinoid	Acute & chronic toxicity, contaminates forage
Fipronil	Pyrazole	Acute & chronic toxicity
Thiamethoxam	Neonicotinoid	Acute & chronic toxicity, contaminates forage
Abamectin	Macrolide	Acute toxicity
Dinotefuran	Neonicotinoid	Acute & chronic toxicity, contaminates forage
lambda-Cyhalothrin	Pyrethroid	Acute toxicity
Fenithrothion	Organophosphorus	Acute toxicity
Resmethrin	Pyrethroid	Acute toxicity
Chlorpyrifos	Organophosphorus	Acute toxicity



Appendix IV: Resources for retailers

Additional EPA Designated Insecticides Toxic to Bees, Butterflies and Other Pollinators

Active Ingredient	Chemical Class	Hazard to Bees
Acephate	Organophosphate	Acute toxicity
Acetamiprid	Neonicotinoid	Acute & chronic toxicity, contaminates forage
Aldicarb	N-Methyl Carbamate	Acute toxicity
Alpha-cypermethrin	Synthetic Pyrethroid	Acute toxicity
Amitraz	Acaricide/Insecticide	Acute toxicity
Arsenic acid	Heavy Metal, Inorganic-Arsenic	Acute toxicity
Azadirachtin	Botanical	Acute toxicity
Bensulide	Organophosphorus	Acute toxicity
Beta-cyfluthrin	Pyrethroid	Acute toxicity
Bifenazate	Carbazate	Acute toxicity
Bifenthrin	Pyrethroid	Acute toxicity
Carbaryl	Carbamate	Acute toxicity
Carbofuran	N-Methyl Carbamate	Acute toxicity
Chlorethoxyfos	Organophosphorus	Acute toxicity
Chlorfenapyr	Pyrazole	Acute toxicity
Chlorpyrifos methyl	Organophosphorus	Acute toxicity
Cyantraniliprole	Cyantraniliprole	Acute & chronic toxicity, contaminates forage
Cyfluthrin	Pyrethroid	Acute toxicity
Cypermethrin	Pyrethroid	Acute toxicity
Cyphenothrin	Pyrethroid	Acute toxicity
Deltamethrin	Pyrethroid	Acute toxicity
Diazinon	Organophosphorus	Acute toxicity
Dichlorvos	Organophosphorus	Acute toxicity
Dicrotophos	Organophosphorus	Acute toxicity

Appendix IV: Resources for retailers

Active Ingredient	Chemical Class	Hazard to Bees
Dimethoate	Organophosphorus	Acute toxicity
Diuron	Substituted phenylurea	Acute toxicity
D-trans-allethrin	Pyrethroid	Acute toxicity
Emamectin benzoate	Macrocyclic Lactone	Acute toxicity
Endosulfan	Chlorinated Hydrocarbon	Acute toxicity
Esfenvalerate	Pyrethroid	Acute toxicity
Ethoprop	Organophosphorus	Acute toxicity
Etofenprox	Pyrethroid Ether	Acute toxicity
Fenazaquin	Quinazoline	Acute toxicity
Fenpropathrin	Pyrethroid	Acute toxicity
Fluvalinate	Synthetic Pyrethroid	Acute toxicity
Fosthiazate	Organophosphorus	Acute toxicity
Gamma-cyhalothrin	Pyrethroid	Acute toxicity
Imiprothrin	Pyrethroid	Acute toxicity
Indoxacarb	Oxadiazine	Acute toxicity
Malathion	Organophosphorus	Acute toxicity
Metaflumizone	Semicarbazone	Acute toxicity
Methiocarb	N-Methyl Carbamate	Acute toxicity
Methomyl	N-Methyl Carbamate	Acute toxicity
Momfluorothrin	Pyrethroid	Acute toxicity
Naled	Organophosphorus	Acute toxicity
Oxamyl	Carbamate	Acute toxicity
Permethrin	Pyrethroid	Acute toxicity
Phenothrin	Pyrethroid	Acute toxicity
Phorate	Organophosphorus	Acute toxicity

Appendix IV: Resources for retailers

Active Ingredient	Chemical Class	Hazard to Bees
Phosmet	Organophosphorus	Acute toxicity
Pirimiphos-methyl	Organophosphorus	Acute toxicity
Prallethrin	Pyrethroid	Acute toxicity
Profenofos	Organophosphorus	Acute toxicity
Propoxur	N-Methyl Carbamate	Acute toxicity
Pyrethrins	Botanical	Acute toxicity
Pyridaben	Acaricide/Insecticide	Acute toxicity
Rotenone	Isoflavones	Acute toxicity
Sethoxydim	Cyclohexanone	Acute toxicity
Spinetoram	Spinosyn	Acute toxicity
Spinosad	Spinosyn	Acute toxicity
Sulfoxaflor	Sulfoximines	Acute & chronic toxicity, contaminates forage
Tefluthrin	Pyrethroid	Acute toxicity
Tetrachlorvinphos	Organophosphorus	Acute toxicity
Tetramethrin	Pyrethroid	Acute toxicity
Tolfenpyrad	Pyrazole	Acute toxicity
Zeta-cypermethrin	Pyrethroid	Acute toxicity



Top U.S. food retailers have a unique opportunity and responsibility to help make our food system healthier for pollinators, people and the planet.

Appendix IV: Resources for retailers

Registered Herbicides Harmful to Bees, Butterflies and Other Pollinators

Active Ingredient	Chemical Class	Hazard to Bees
Glyphosate	Phosphonoglycine	Eliminates forage & habitat
Atrazine	Triazine	Eliminates forage & habitat
Simazine	Triazine	Eliminates forage & habitat
Sulfallate	Dithiocarbamate	Eliminates forage & habitat
2,4-D	Chlorophenoxy acid or ester	Eliminates forage & habitat, chronic toxicity
Dicamba	Chlorophenoxy acid or ester	Eliminates forage & habitat

Registered Fungicides Harmful to Bees, Butterflies and Other Pollinators

Active Ingredient	Chemical Class	Hazard to Bees
Trifloxystrobin	Strobin	Acutely toxic
Iprodione	Dicarboximide	
Vinclozolin	Dicarboximide	
Procymidone	Heterocyclic organochlorine	
Captafol	Thiophthalimide	
Clonitralid	<i>Molluscicide</i>	
<u>Pyraclostrobin</u>	Strobin	



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