# Carting Away the Oceans 10



# GREENPEACE

Greenpeace is an independent campaigning organization that uses peaceful protest and creative communication to expose global environmental problems and to promote solutions that are essential to a green and peaceful future.

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To pressure national environment ministers to vote for (and ultimately approve) a progressive European Union Plastics Strategy, Greenpeace activists from 13 countries hang a 50 meter "NO PLASTIC" banner from the Asparuhov Bridge in Varna, Bulgaria.

#### Acknowledgments

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Scorecard	2
Introduction	3
Companies Evaluated & Methodology	10
Plastics Are Devastating Our Oceans	12
Everyone Must Take Action	14
Retailer Profiles	16
Glossary	40
Endnotes	43

# 2018 Supermarket Sustainable Seafood Scorecard

0 - 39.9

70 - 100

40 - 69.9

#1 #12 SUPERVALU 80.4 HyVee 79.8 #13 Walmart 💢 #3 71.9 #14 TRADER JOE'S #4 #15 70.8 56.2 #5 #16 Southeastern Wegmans #17 Publix #18 #8 65.4 #19 46.4 Ahold Delhaize #9 64.1 40.4 #21 SAVE MART meijer 62.3 39.2 #22 Wakefern #11 37.9

## Introduction

In June 2008, Greenpeace published the first edition of Carting Away the Oceans, and evaluated 20 major U.S. grocery retailers on seafood sustainability. By documenting current practices and educating retailers about the impacts of their seafood sales on marine life and our oceans, we sought to raise consumer awareness and collectively encourage retailers to source only sustainable seafood. At that time, the vast majority of retailers were concerned with price and quality, not seafood sustainability. Unsurprisingly, all 20 retailers failed in the first evaluation. Ten years later, in this tenth edition of Carting Away the Oceans, 20 out of 22 retailers have achieved at least passing scores.

We would like to acknowledge the extensive contributions of Greenpeace supporters and volunteers, non-governmental organizations (NGOs), scientists, governments, retailers, suppliers, and the press. Through dialogue, collaboration, and a persistent vision for a better future for our oceans, together we have achieved a great deal over the past ten years. Nonetheless, the work over this next decade is critical to ensuring healthy oceans teeming with marine life, where seafood workers are treated fairly, and coastal fishers are able to provide for their families without suffering exploitation from industrial fishing fleets. To achieve this vision for marine life and people, we must stay focused and act with a sense of urgency.

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As fish stocks decline from overfishing, industrial fleets expand, and demand increases for cheap seafood, some companies are motivated to employ cheap or forced labor and to fish illegally. Furthermore, a conveniencedriven, throwaway culture is exacerbating a global plastic pollution crisis in our oceans. As our planet faces greater environmental threats, more and more people are coming together to demand real social and environmental leadership from corporations, and to create a better future. This moment requires marked action. As we have urged in every Carting Away the Oceans, retailers should use their brand and buying power now to create a different world for our oceans and humanity.



### Timeline of Notable Milestones Since June 2008

Greenpeace has evaluated U.S. grocery retailers on sustainable seafood since 2008. This timeline highlights some of the milestones and accomplishments that demonstrate progress in this sector over time.

June 2008: Greenpeace releases its first Carting Away the Oceans report. Not a single retailer received a passing score. Sustainable seafood was not even on the radar of many retailers, and orange roughy and Chilean sea bass commonly appeared in seafood cases across the country.

**December 2008:** A six-month update of Carting Away the Oceans is released to reflect swift progress by several retailers. Nine retailers drop one or more red list items, including shark, bluefin tuna, orange roughy, and Chilean sea bass. Wegmans and Whole Foods post

**June 2009:** The third edition of *Carting* Wegmans, Ahold, and Whole Foods in the lead, and H-E-B, Price Chopper, and Meijer in the back of the pack. Target and Walmart have both dropped orange roughy and Wegmans asks the U.S. State Department to address illegal, unreported, and unregulated (IUU) fishing.

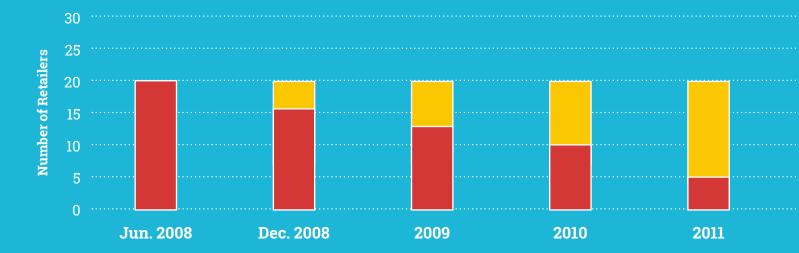
January-March 2010: Target announces that it will stop selling all farm-raised salmon (which it unfortunately reintroduces in 2017). Following a Greenpeace campaign, Trader Joe's agrees to implement sustainability measures throughout its seafood operations, and stops selling orange roughy.

April 2010: In the fourth edition of Carting Away the Oceans, half of the 20 retailers evaluated receive passing scores, and more than half have sustainable seafood policies. Target, Wegmans, and Whole Foods lead the pack, while Winn-Dixie, Meijer, and **H-E-B** are dead last. Greenpeace launches a campaign on **Costco** to clean up its sourcing.

Early 2011: Costco, Harris Teeter, H-E-B, and Safeway discontinue orange roughy, three more retailers drop Chilean sea bass, and Price **Chopper** discontinues shark. Following Greenpeace's campaign, Costco agrees to remove more than half of its red list seafood items, pursue better practices in aquaculture, and assume a leadership role to develop a sustainable global tuna industry. Safeway and Wegmans publicly call for a marine protected area in the Ross Sea. (Today, under an international agreement signed in 2016, this intact ecosystem is now protected from all commercial fishing for 35 years.)

**April 2011:** Five new retailers receive passing scores, and only five retailers Away the Oceans. Safeway, Target, and Wegmans lead the pack, while SUPERVALU, Winn-Dixie, and Meijer remain in last place.

April 2012: By the sixth edition of Carting Away the Oceans, Safeway and Whole Foods are the first retailers to earn a green ranking and the only two profiled retailers selling sustainable private label canned tuna. Wegmans ranks third, and the three worst performers are SUPERVALU, Publix, and Bi-Lo/Winn-Dixie. The sale of four top-tier red list species across profiled retailers has dropped precipitously since 2008: shark (down 78%), orange roughy (down 75%), hoki (down 71%), Chilean sea bass (down 50%). A&P, Ahold, ALDI, Costco, Meijer, Target, and Walmart do not sell any of these species.



May 2013: In the seventh edition of Carting Away the Oceans. Whole Foods, Safeway, and Trader Joe's lead the pack in the green category, while Kroger, Publix, and Bi-Lo continue to scrape the bottom. Walmart has introduced FAD (fish aggregating device)-free skipjack and pole and line albacore tuna in more than 3,000 stores nationwide, and ALDI, H-E-B, Meijer, Trader Joe's, and Whole Foods have genetically engineered (GE) salmon.

May 2014: In the eighth edition of Carting Away the Oceans, the four green rated companies are Whole Foods, Safeway, Wegmans, and Trader Joe's and the four failing companies are Publix, Save Mart, Bi-Lo, and **Roundy's**. Every other retailer achieves a passing score. Safeway and Kroger join more than 60 other retailers pledging not to sell GE salmon. Hy-Vee debuts in fifth place, selling sustainable private label canned tuna along with Whole Foods, Safeway, and Trader Joe's. Greenpeace demands action from retailers on labor and human rights abuses and IUU fishing.

June 2014: A UK Guardian investigation reveals forced labor in the supply chain of the Thai shrimp industry's biggest supplier, CP Foods, naming Walmart, Costco, and ALDI as customers of shrimp supplied by CP Foods.<sup>2</sup>

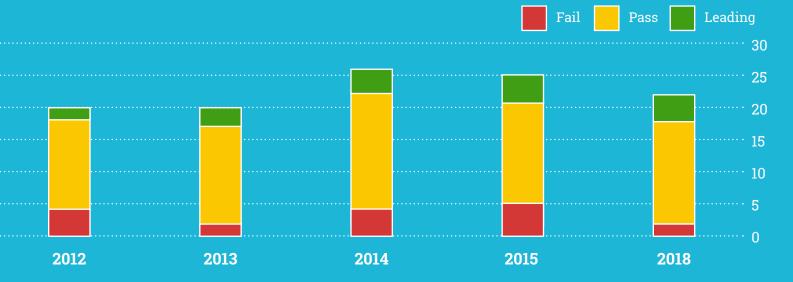
June 2015: In the ninth edition of Carting Away the Oceans, Whole Foods, Wegmans, Hy-Vee, and Safeway earn a green rating, while Southeastern Grocers, Roundy's, Publix, A&P, and Save Mart fail. Costco and Target begin selling private label sustainable canned tuna. Whole Foods, Wegmans, Hy-Vee, Safeway, Ahold, and Giant Eagle call on Congress to pass tougher legislation to stop IUU fishing.

**December 2015:** An Associated Press investigation reveals child and forced supply chains.3 Kroger, Albertsons, Whole Foods, and Walmart are tainted seafood might have ended up (in either shrimp or pet food products), to demonstrate the significant risks for all retailers regarding poor traceability.

**2016:** Greenpeace's global campaign on tuna giant Thai Union is underway. In April, Greenpeace launches a campaign on Walmart to improve its canned tuna. Several U.S. retailers continue focusing. or begin to focus, on canned tuna. In December, Greenpeace's Turn the Tide report4 documents the risks associated with transshipment at sea, including a significant risk of products sold by major U.S. retailers being linked to IUU fishing and human rights abuses.

2017: In March, Mars and Nestlé announce strong measures to address transshipment at sea. Several retailers have released public shelf-stable tuna policies, including, Whole Foods, Hy-Vee, ALDI, Giant Eagle, Wegmans, and Albertsons. Whole Foods becomes the first U.S. retailer to commit to sell only sustainable canned tuna (private label and national brands). By the release of Greenpeace's second U.S. Tuna Shopping Guide<sup>5</sup> in April, ALDI, Giant Eagle, Ahold Delhaize, Kroger, SUPERVALU, and Southeastern Grocers are developing or selling sustainable private label canned tuna products. In July, Thai Union commits to a series of environmental and social reforms, that will transform its U.S. and global tuna supply chains.

August 2018: Greenpeace releases its tenth edition of Carting Away companies receive passing scores, versus all failing in 2008. Whole Foods, Hy-Vee, and ALDI hold the top three ranks as Price Chopper, Save Mart, and Wakefern score the lowest. Amid major improvements over the last decade, new threats persist from labor and human rights abuses, climate change, and plastic pollution. The next decade is critical for ocean health and humanity.



### Carting Away the Oceans 10: Significant Findings

Following mergers, acquisitions, and bankruptcies, this year's edition assesses 22 U.S. retailers with a significant nationwide or regional presence, including one newly profiled retailer (Sprouts Farmers Market, or "Sprouts"). Ninety percent of the retailers achieved at least a passing score.

- Whole Foods remains the top-ranked retailer following the release of its shelf-stable tuna policy last year. After Amazon's acquisition of Whole Foods, questions remain as to whether Amazon will follow the grocer's lead on sustainable seafood.
- Hy-Vee (ranked 2nd), improving on shelf-stable tuna and with several advocacy initiatives, takes Wegmans' place near the top. Wegmans dropped four spots to 6th, in part because of its unfortunate reintroduction of orange roughy and its troubling decision to source farmed Pacific bluefin tuna for special events.
- By continuing to implement their policies and seize advocacy opportunities, ALDI (ranked 3rd) and Target (4th) moved into the green category. Giant Eagle's (5th) years-long focus on sustainable seafood is bearing fruit: the retailer leapt six spots to round out the top five.
- ALDI (ranked 3rd), Giant Eagle (5th), Wegmans (6th), and Sprouts (8th) have public policies with requirements regarding transshipment at sea for tuna. Whole Foods (1st), Hy-Vee (2nd), and Meijer (10th) are the only profiled retailers that fully source pole and line and/or FAD-free tuna for their own brand shelf-stable products.
- None of the profiled retailers have major, comprehensive commitments to reduce and ultimately phase out their reliance on single-use plastics. Among the largest U.S. retailers by revenue, Walmart, Kroger, Costco, Ahold Delhaize, Albertsons, and Amazon must urgently address their contribution to the plastic pollution crisis.

- Following its acquisition of Safeway, Albertsons Companies' ("Albertsons," ranked 7th) public commitments and advocacy initiatives landed it as the highest ranked among the nation's five largest (by revenue) retailers, and the company is building upon Safeway's legacy of sustainable seafood initiatives. Ahold Delhaize (9th) and Kroger (gained seven spots to 11th) are close behind, while Walmart (13th) dropped one spot and Costco's (15th) rank remains unchanged.
- Newly profiled Sprouts (ranked 8th) has a new sustainable seafood policy, with plans to source 100% pole and line shelfstable tuna and to phase out red list species.
- Save Mart (ranked 21st), Publix (17th), Southeastern Grocers (16th), Kroger (11th), and Giant Eagle (5th) are the most improved retailers, respectively. Southeastern Grocers and Publix both received passing scores for the first time ever. Although Save Mart failed in this report, as it implements its new seafood policy, it should continue to improve.
- While other retailers made strong gains, Trader Joe's (ranked 14th) dropped seven spots following a lack of initiatives and customer engagement on sustainable seafood. Price Chopper (20th) dropped six spots, underperforming on initiatives and transparency, while Wakefern (22nd) dropped five spots to scrape the bottom of the rankings.



### The Modernization of Grocery Retail

There has been a dramatic change in grocery retail since the last edition of Carting Away the Oceans in 2015. Consolidations continue and formerly profiled companies have either merged or gone out of business.

Several trends are emerging in the wake of Amazon's acquisition of Whole Foods, as competitors seek to remain relevant in this new era of grocery retail.6 Retailers are partnering with delivery services to offer faster, even two-hour, delivery. Walmart acquired Jet.com, Target acquired Shipt, retailers from Costco to Albertsons offer delivery through Instacart, and Ahold Delhaize's Peapod, which launched decades ago, is offering price cuts and promotions to remain competitive. At the store level, retailers are investing in modernized layouts, signage, and product packaging, as many open smaller-format stores for urban millennials. Some are also integrating tech solutions that offer convenient ways to shop and pay for groceries (e.g., pick up pre-bagged groceries, Apple Pay). A key strategy

in staying competitive, employed by the likes of Trader Joe's, ALDI, and Costco, involves a focus on private label products, especially as millennials and urban shoppers increasingly trust these over national brands. 7,8,9

As part of this technological modernization effort, some retailers are working with organizations or companies that can bolster a retailer's seafood traceability, to avoid unsustainable or unethically sourced seafood (e.g., Whole Foods, Ahold Delhaize, and Albertsons with Trace Register; Publix, Walmart, and Giant Eagle with Sustainable Fisheries Partnership (SFP) for its Ocean Disclosure Project (ODP)). While this is a welcome trend, Greenpeace cautions against the public relying too heavily on such resources for information. In the case of ODP, the data are all self-reported, focus only on wild-caught seafood, and even then, do not encompass the entire inventory.<sup>10</sup> Nonetheless, Greenpeace acknowledges such efforts as a great first step toward greater seafood traceability and transparency.

### Drowning in Plastic

Across the board, retailers are severely lagging in their efforts to tackle single-use plastic packaging. The equivalent of one garbage truck of plastic enters our oceans every minute,11 and with plastic production set to double in the next 20 years—largely for packaging the threats to ocean biodiversity and seafood supply chains are increasing. The United Nations (UN) describes it as a potential "toxic time-bomb." Single-use plastics

are devastating our oceans (see page 12), and retailers must take responsibility for their contribution to this global crisis. Retailers in the United Kingdom<sup>13</sup> and the Netherlands<sup>14</sup> are making significant changes and commitments toward reducing or eliminating the use of plastics in their operations. It is time for U.S. retailers to swiftly and comprehensively reduce and eventually phase out single-use plastics.

## Struggling to Uphold Labor and Human Rights Standards

The year 2018 has seen a continued focus on labor and human rights in the seafood industry, including several reports from organizations like Human Rights Watch,15 International Labor Rights Forum (ILRF),<sup>16</sup> Greenpeace,<sup>17</sup> and Oxfam. 18 Behind the Barcodes, a recent Oxfam report, even profiled some of the same supermarkets in this report across four categories: transparency, workers, farmers, and women. It found that all six U.S. retailers<sup>ii</sup> profiled outright failed, and had "barely shown any awareness," in particular regarding transparency in their supply chains and gender inequality issues.<sup>19</sup>

Many in the industry are part of initiatives, such as the Seafood Task Force. While such fora can facilitate improvements, this initiative seems to have stalled out. iii, 20 For meaningful changes to occur in Thailand, Taiwan, and other key regions, the Task Force and its member companies must step up their commitment by

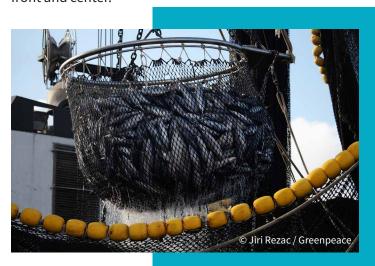
Walmart, Kroger, Albertsons, Ahold Delhaize, Costco, and Whole Foods.

The Seafood Task Force's membership covers a wide range of interests, from vessel operators to global retailers, which, given different objectives and concerns, may be slowing down its progress. Its governance structure does not allow for effective external stakeholder engagement, which prevents the Task Force from actually fixing problems faced by workers (e.g., eliminating recruitmentment fees, ensuring genuine and effective worker voice mechanisms, and using buying power to encourage the Thai government to enact legal reforms, especially  $for worker \, representation). \, For more, including \, recommendations \, for \, the \, Task \, Force, see \, end note \, 20.$ 

encouraging the Thai and Taiwanese governments to make it legal for migrant workers to organize and lead trade unions, and to ensure that International Labour Organization (ILO) conventions 87, 98, 108, and 188 are ratified and fully implemented.<sup>21</sup> Fortunately, other initiatives like the newly formed Fishers' Rights Network (FRN) are working to stop exploitation and abuse in the Thai fishing industry, and calling for bold action from the Thai government. Supported by the International Transport Workers' Federation, the FRN<sup>22</sup> is helping workers to organize and campaign to improve the wages, working conditions, and labor rights of all fishers in the Thai fishing industry.

In May, Greenpeace East Asia reported on systemic problems in Taiwan's distant water fishing fleets, including labor and human rights abuses linked to one of the world's largest seafood traders, Fong Chun Formosa Fishery Company (FCF).<sup>23</sup> Many large U.S. retailers do business with FCF and should act quickly to evaluate the social responsibility and sustainability of any seafood supplied by FCF, including calling on FCF to make far-reaching reforms. iv Retailers must leverage their long-term supplier relationships—whether with FCF or another supplier—to improve problematic operations wherever possible. However, if a supplier cannot demonstrate swift and effective action to eliminate problems once they have been identified, then retailers or other customers should terminate their relationship with that supplier.

Most eco-certification schemes either insufficiently address or outright ignore labor abuses and seafood worker treatment in the supply chain, 24, 25, 26 and even social certifications have failed to create the systemic changes needed.27 Rather than doubling down on inherently flawed certification schemes or relying only on corporate codes of conduct and internal or external audits, industry and NGOs must reconsider whether this approach is indeed working. Greenpeace encourages all profiled retailers and their suppliers to aim higher and instead support ILRF's call to action<sup>28</sup> to hold companies and retailers accountable through legally binding commitments and enforceable agreements with trade unions and workers' organizations that put workers' rights, legal fishing, and environmental sustainability front and center.



### "Certified" Sourcing and Troubling Policy Developments

While retailers have collectively phased out many red list species over the past decade, amid controversial Marine Stewardship Council (MSC) certifications of orange roughy and Chilean sea bass, some retailers may be eager to begin sourcing them again. Greenpeace strongly cautions against this potential transgression. Sometimes a species should not be commercially available, despite what the MSC or any other certification scheme says; most certifiers face strong industry pressure and have a financial incentive to certify fisheries or farms. While Greenpeace recognizes there is some value to certifications, retailers cannot solely rely on them given outstanding concerns. 29, 30, 31, 32, 33, 34, 35

Meanwhile, in U.S. waters, trouble is brewing with the Trump administration's repeal of the National Ocean Policy<sup>36</sup> and the U.S. House of Representatives' approval of a bill that significantly weakens conservation measures in the Magnuson-Stevens Act. 37, 38 This should concern every retailer that sources from U.S. fisheries, and those retailers touting the strength of sourcing from U.S. fisheries in their public policies. Retailers must advocate for strong ocean protections and science-based fisheries management both domestically and abroad.

v Such as the ambitious commitments that Thai Union made following a Greenpeace campaign. See www.greenpeace.org/international/press-release/7207/thai-union-commits-tomore-sustainable-socially-responsible-seafood.

### Tuna Improvements and Challenges

Following a global campaign that included extensive U.S. retailer engagement, Thai Union responded to serious supply chain concerns (i.e., environmental, labor, and human rights). Thai Union, the world's largest tuna processor, has developed a comprehensive new policy and program of change, demonstrating to the wider tuna and seafood industries what is possible if a company is willing to set a higher bar.39

In light of similar issues linked to its supply chains, FCF should now do the same. It is troubling that FCF touts sourcing MSC certified tuna (which, including the aforementioned concerns with MSC, only partly covers some of its operations) and has yet to apply its sustainability and social responsibility fisheries policies to all of its products. FCF must work alongside its suppliers to eliminate seafood that is associated with labor or human rights abuses. As one of the world's largest tuna traders, this would help block tainted products from entering several key markets. FCF must assess all of its supplying vessels and prioritize auditing companies that are historically linked to IUU fishing or labor abuses. Retailers should move quickly to seek assurances and evidence that the seafood they buy from FCF is not linked to environmental destruction or labor abuses.

The tuna industry is fraught with transshipment at sea, where smaller boats refuel, restock, and transfer catch onto larger cargo vessels. This practice is often used to traffick workers who have no means of escape, turning fishing

Where We Go from Here

Despite the challenges we face, the past ten years have demonstrated that several retailers are willing and able to make significant improvements, to advocate with suppliers, governments, and industry laggards, and to take action—even when difficult. We will need this enthusiasm more than ever over the next decade, and urge retailers to use their brands, buying power, and influence to do what is right for our oceans and for future generations.

boats into floating prisons, and enabling vessels to hide illegally caught fish and mistreat crew members. 40,41 Many retailers require tuna supplied by International Seafood Sustainability Foundation (ISSF) member companies, although this will not sufficiently address high-risk practices like transshipment at sea with longline vessels<sup>v</sup> or ensure sustainable tuna. vi Fortunately, some companies are taking action, including Thai Union,<sup>42</sup> Nestlé,<sup>43</sup> Mars,<sup>44</sup> Aramark, 45 ALDI, 46 Wegmans, 47 Giant Eagle, 48 and Sprouts. 49

Retailers are also moving toward sustainable shelfstable tuna. In 2011, Whole Foods was the first U.S. retailer to sell private label sustainable canned tuna, and in 2017, it was the first U.S. retailer to commit to sell only sustainable canned tuna across its entire private label and national brands. (Indeed, Whole Foods has effectively rendered the transshipment at sea issue moot, in that it only sources one-by-one caught tuna that avoids this problematic practice altogether.) In 2015, six retailers profiled in this report had sustainable private label canned tuna products; today, that number has nearly doubled to eleven, with additional retailers expected to launch products in the near future. As retailers continue to make improvements on their private label sourcing, they should also demand improvements from national brand suppliers and traders (like FCF), address problematic transshipment at sea, advocate for improved management by regional fishery management organizations (RFMOs).50



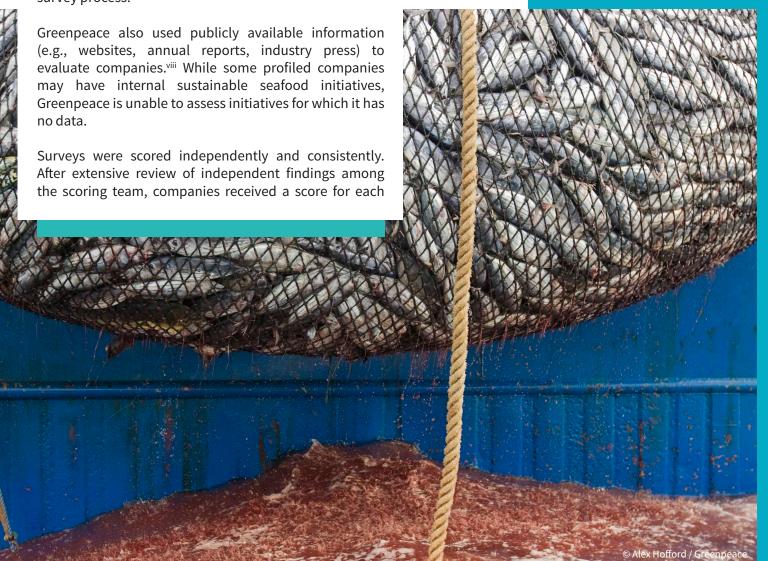
Y Transshipment at sea with longline vessels must meet strict standards. Unfortunately, ISSF has yet to develop a comprehensive set of ISSF Conservation Measures to better manage transshipment at sea (e.g., 100% observer coverage for transshipments involving all longline vessels, regardless of length, limits to vessel time at sea), despite its own extensive review of the practice. See iss-foundation.org/knowledge-tools/technical-and-meeting-reports/download-info/issf-2018-08-transshipment-strengthening-tuna-rfmo-transshipment-

vi ISSF standards largely fail to address overcapacity and destructive fishing methods such as the use of FADs and longlines. Its standards alone are insufficient to achieve the level of sustainability needed to ensure long-term tuna stock health or to mitigate concerns with labor and human rights abuses. Furthermore, ISSF is closely connected to industry, which has raised questions in the past. See www.greenpeace.org/usa/oceans/sustainable-seafood/how-international-seafood-sustainability-foundation-blocks-environmental-action.

# Companies Evaluated & Methodology

This report evaluates the seafood sustainability of 22 U.S. retailers<sup>vii</sup> in four key areas: policy, initiatives, labeling and transparency, and inventory. Each company received an identical survey reflective of the four scoring criteria, along with advance notice of the survey and context about this assessment, and was given approximately seven weeks to complete it. This year had a high rate of survey participation among profiled retailers: only Publix, H-E-B, and Wakefern declined to participate in the survey process.

criterion and an overall score (a weighted average of all four criteria). Each company profile features its score for each of the four criteria and its overall score (on a 100-point scale). Retailers are ranked based on their overall score, where below 40 is failing (red), 40 to 69.9 is passing (yellow), and above 70 is leading (green). Each company is encouraged to meet with Greenpeace to discuss its results and Greenpeace's recommendations.



wii While several profiled companies have international operations (e.g. Walmart, Costco, Ahold Delhaize), this report evaluates U.S. operations only. However, Greenpeace expects international retailers to have global initiatives and develop consistent standards for every country where they operate.

viii For a majority of retailers, the information on stores, banners, and revenue is primarily based on data available in the Supermarket News "Top 75 Retailers & Wholesalers" report. See www.supermarketnews.com/top-75-retailers-wholesalers/sn-s-2018-top-75.

### Seafood Sustainability Scoring Criteria

#### 1. Policy

The policy score reflects the system that the company has in place to govern its purchasing decisions and avoid supporting destructive practices. To lead in this category, a retailer would need to establish and enforce rigorous standards to responsibly source wild-caught and farmraised seafood across its fresh, frozen, and shelf-stable categories.

#### 2. Initiatives

The initiatives score evaluates a retailer's efforts to improve fisheries management through policy and market interventions (e.g., refuse to buy tuna transshipped at sea; take measures to prevent IUU fishing; advocate for reforms with RFMOs; require suppliers to source only sustainable, ethical shelf-stable tuna; engage suppliers to improve their operations; work with groups to publicly promote sustainable seafood and protect workers' rights). Retailers that have taken action to assess and reduce their plastic footprint, particularly with regard to single-use plastics, earn bonus points in this category.

#### 3. Labeling and Transparency

This score evaluates a retailer's transparency (e.g., online and in-store communication, vessel- or farmto-shelf traceability). Equally important is whether retailers call on their suppliers to be transparent, particularly about where and how they catch or farm seafood. For customers, some companies present the data at the point of sale, while others opt to make the data accessible online. The best retailers do both, and a leader in this category would go to considerable lengths to educate its customers about the seafood they buy and the impacts of their choices.

#### 4. Inventory (Red List)

This score evaluates each retailer's seafood inventory across 26 commonly sold species. benchmarked each retailer's inventory against Watch the Monterey Bav Aguarium Seafood recommendations, and considered whether a retailer mitigates sourcing concerns (e.g., engaged in a rigorous fishery improvement project (FIP) or aquaculture improvement project (AIP)).ix

### Performance Badges



**Category Winner**—Awarded to each of the four category winners: Policy: Whole Foods; *Initiatives*: Hy-Vee; *Labeling* and Transparency: Hy-Vee; and Inventory: Trader Joe's.





TRADER JOE'S®



Canned Tuna—Awarded to the three retailers that sell only sustainable private label canned tuna.









Improvement—Awarded to the five most improved retailers (based on overall score, not relative ranking) since the previous report, in the order below.













Wrong Way-Indicates the five retailers whose score dropped more than 0.1 points since the previous report, in this order from biggest to smallest drop.







TRADER JOE'S®



ix Many timebound FIPs/AIPs can play a temporary role to improve operations and sourcing in more sustainable ways, and retailers can help ensure FIPs/AIPs are effective. However, in an industry with

rampant overfishing, IUU fishing, and human rights abuses, sourcing of a problem species from a FIP or AIP is not always the solution. "Continuous improvement" can be a misleading, overused phrase by industry and NGOs to excuse the continued sale of a problem species with no solution in sight. Greenpeace advises retailers to not base entire purchasing policies or sustainability/social responsibility statements on sourcing from a FIP or AIP. The solution for most contentious species (e.g., orange roughy, bigeye tuna) is simple: stop sourcing immediately.

# Plastics Are Devastating Our Oceans

### **Retailers Failing on Plastics**

The flow of plastics into our environment has reached crisis levels, and the evidence is most clearly on display in our oceans. The equivalent of one garbage truck of plastic enters our oceans each minute.51 A recent study estimated that there may be more than 50 trillion pieces of plastic in our oceans,<sup>52</sup> and according to the UN, ocean plastic causes the deaths of hundreds of thousands of marine animals each year.53 A 2015 study that analyzed the digestive tracts of fish sold in the United States and Indonesia found microplastic contamination in about 25% of the seafood sampled.<sup>54</sup> A 2017 study found substantial microplastic contamination in municipal tap water in every region of the world.55 Every minute, one million plastic bottles are purchased worldwide,56 and with plastic production set to double in the next 20 years—largely for plastic packaging—the threats to ocean biodiversity and seafood supply chains are increasing. The UN describes this as a potential "toxic time-bomb." 57

For this year's assessment, we asked retailers what steps they have taken to address their plastic footprints. Unfortunately, most retailers have done far too little given the scope of the problem. Walmart's 2025 goal of 100% recycled content for its private label packaging

is the epitome of an outdated, ineffective strategy that many retailers currently employ. We cannot recycle our way out of this problem: less than 10% of plastic is recycled in the United States<sup>58</sup> and only 14% globally.<sup>59</sup> As it slowly degrades, plastic becomes more dangerous—breaking down into smaller pieces that are eaten by birds, whales, turtles, and other marine life; ending up in our drinking water, salt, and food, raising significant health concerns; and even contaminating the air we breathe in the form of microplastic particles.<sup>60</sup>

We can no longer afford to use plastic materials that last forever to make products that we use once and throw away. Throwaway packaging, straws, utensils, bags, and other single-use plastic items are choking our waterways and polluting our environment. That is why Greenpeace, alongside more than 1,000 organizations in the Break Free From Plastic movement, 61 is calling on retailers to set ambitious goals to quickly phase out single-use plastics. Without immediate action, the increasing quantity of plastics in our oceans will have severe consequences for biodiversity and human food and water safety.

### **Consumer Trends**

Concern about plastic pollution is growing rapidly. A 2018 Ipsos survey on global views on the environment found that more than half of global respondents would reuse their disposable items to help cut down on waste. Among American millennials, plastic pollution is now perceived to be a threat on par with oil spills, which has long been their top concern. Further, millennials expect action: 64% of millennials surveyed believe that we are likely to make progress in reducing the flow of plastic pollution into our oceans in the next five years.

Many businesses are responding. In January 2018, UK retailer Iceland became the first major supermarket chain to commit to dropping plastic packaging from its own brand products. McDonald's pledged to drop Styrofoam cups and packaging by the end of 2018,

Starbucks announced it will be getting rid of plastic straws, and IKEA is phasing out single-use plastics. Bon Appétit Management Company was the first U.S. institutional foodservice company to make a public commitment, banning plastic straws, and in July, Aramark announced its ambitious plan to reduce single-use plastics across its global operations.

As other retail and foodservice sectors take action on single-use plastics, U.S. grocery retailers largely remain silent. As the five largest U.S. retailers, Walmart, Kroger, Costco, Albertsons, and Ahold Delhaize have an added responsibility to act immediately; however, *all* retailers must move swiftly to address the plastics crisis, starting with public commitments and time-bound policies to reduce their single-use plastic footprints.

### **Policy Changes**

Governments at all scales are taking action globally. Plastic pollution tends to be a non-partisan issue in the United States, as evidenced by the ban on microbeads passed by Congress in 2016—one of the very few progressive environmental laws passed in recent years. California, Puerto Rico, and American Samoa have banned plastic bags, and a New York bag ban looks inevitable. Baltimore has outlawed Styrofoam, Seattle is getting rid of plastic straws, and other new laws to limit single-use plastics are being planned and debated in towns and cities nationwide.

France banned plastic plates and cutlery in 2016, and the European Union is considering more sweeping measures. Plastic bag bans are in effect in more than a dozen African countries, and India and Costa Rica are getting rid of single-use plastics altogether. Taiwan has announced it will begin banning plastic straws and several other single-use plastic items by 2019. In this global climate of rapid regulatory change, a strong business case is emerging for corporations to come together and support legislation to phase out throwaway plastics.

### **Alternatives**

Over previous decades, plastic has become a very common part of our lives. Fortunately, there are several complementary approaches that can help move companies away from single-use plastics.

many products, the answer is relatively straightforward: replace single-use plastic items like shopping bags, cutlery, and straws with reusable items made from more sustainable materials. Unnecessary packaging can simply be discontinued, saving money and avoiding ridicule from customers who do not want individually wrapped oranges, potatoes, cucumbers, or bananas. For most products typically sold in plastic packaging, there are alternatives in glass, aluminum, or cardboard. Better yet is the trend toward bulk sales,

plastic-free aisles, and other new approaches to product delivery that do not rely on single-use packaging at all.

Bioplastics and biodegradable plastics may play a role in some cases, but often bring sustainability concerns of their own and have not yet proven to be sustainable alternatives at scale. Bioplastic implies that some or all of the source material is from plants, but carries no guarantee of sustainability—and in some cases still includes fossil fuels. Many so-called biodegradable materials do not break down at temperatures or light levels typically found in the ocean. Additionally, studies show that people are more likely to discard bioplastics in the belief that they will readily biodegrade. 64

### Time for Action

With alarming new scientific studies being published weekly, it is clear that our current reliance on single-use plastics is unsustainable for our planet's health as well as our own. A major course correction is needed, and single-use plastics must be phased out. Greenpeace calls on retailers and their suppliers to take the following actions in 2018:

- **1. Analyze.** What is your single-use plastic footprint? How much of each type of plastic do you sell, and in what types of products? Approximately how much is recycled?
- 2. Commit. Set an ambitious, public goal to reduce your company's plastic footprint and report progress annually. Prioritize eliminating plastics that are rarely recycled, such as anything coded three or higher.
- 3. Innovate. Invest in and test new ways to deliver products that do not rely on single-use plastics, and prioritize reuse rather than throwaway packaging.

- **4. Educate.** Let your customers know about your efforts to reduce your plastic footprint, and urge them to support these efforts by choosing products designed for reuse.
- 5. Advocate. Support public policy initiatives that will phase out single-use plastic items.
- **6. Collaborate.** While some steps to move away from single-use plastics are clear, others are complicated and involve questions about the sustainability of alternative materials, such as carbon footprints, compostability, biodegradability, and water and land issues. Greenpeace can help work through these and other questions and encourages companies to consider additional organizations with expertise in this area.x

<sup>\*</sup>For more information, visit breakfreefromplastic.org; plasticpollutioncoalition.org; newplasticseconomy.org; 5gyres.org; storyofstuff.org/plastics; no-burn.org; asyousow. org/our-work/waste/ocean-plastics; Rethinkdisposable.org.

## Everyone Must Take Action

### Five Ways Grocery Retailers Must Lead

As fish stocks collapse, plastics choke our oceans, and workers continue to be at risk of labor and human rights abuses, retailers must use their purchasing power to bring about positive change for our oceans and seafood workers. Here are five ways they can lead:

- 1. Create a strong, time-bound, publicly available sustainable seafood policy. Retailers with guidelines covering all seafood categories are better able to ensure that they are not causing undue harm to the oceans throughout their operations. Avoid seafood connected to overfishing or destructive fishing and farming methods. In most cases, a rigorous policy can help retailers avoid being lured by the purported sustainability of eco-certifications or the promise that every FIP or AIP is actually improving the targeted fish stock or greater ecosystem.
- 2. Take action to stop forced labor, labor abuse, and IUU fishing. Retailers must improve traceability, transparency, and enforcement mechanisms to ensure that any seafood they source is free of labor and human rights abuses. This includes addressing problematic transshipment at sea, supporting legally binding agreements that protect workers' rights, and calling on FCF and other companies linked to unsustainable or unethical practices to improve immediately.
- **3. Reduce your plastic footprint.** Set an ambitious, public goal to reduce your company's plastic footprint and report progress annually. Prioritize eliminating plastics that are rarely recycled, such as anything coded three or higher.
- **4. Support initiatives and advocate for positive change for our oceans and seafood workers.** Retailers must advocate for policy makers to protect our oceans, improve fishery management, and protect seafood workers' rights throughout the supply chain. Retailers can also encourage their customers and the public at large to pressure decision makers on these issues.
- 5. Increase transparency through data, chain of custody, and education. Responsible seafood is impossible to achieve without establishing strong traceability mechanisms. Traceability must cover the fishing vessel or farm to the point of sale, allowing customers to make educated choices based on all available information. Be transparent with your shoppers both on your website and in stores.



### Five Ways Customers Can Take Action

As fish stocks collapse, plastics choke our oceans, and workers continue to be at risk of labor and human rights abuses, shoppers can vote with their dollar and let retailers know why they want healthy oceans and sustainable, ethical seafood. Here are five ways to demand change from major retailers:

- 1. Know the facts and speak your mind. Visit greenpeace.org/usa/carting-away-the-oceans to learn more. Bring some friends and talk to grocery store managers about seafood sustainability, ocean health, and workers' rights.
- 2. Join the #BreakFreeFromPlastic movement. Sign up<sup>xi</sup> and demand that supermarkets announce ambitious, public goals to reduce their plastic footprints. Take pictures of ridiculously overpackaged items and post them on social media, and talk to store managers about reducing their plastic footprint.<sup>xii</sup>
- 3. Eat tuna? Make sure it is sustainable and ethical. Tell your supermarket that you want responsibly caught tuna, and express your concern if it is coming from suppliers that cannot guarantee sustainable and ethical products, like FCF, Bumble Bee, and StarKist.<sup>65</sup>
- **4. Vote with your dollar. Do not buy orange roughy, Chilean sea bass, or bigeye tuna.** Use the Monterey Bay Aquarium Seafood Watch app<sup>66</sup> to *buy only green rated* "Best Choices" seafood. Ask how your supermarket is addressing concerns about forced labor, labor abuse, and illegal fishing. If you are not satisfied with its response, take your business elsewhere.
- **5. Eat less seafood.** Today's demand for seafood far outweighs what can be sustainably sourced. Reducing seafood consumption now can help lessen the pressure on our oceans, ensuring fish for the future.

xii Read this blog and download the "#PointlessPlastic Toolkit" to get started. www.greenpeace.org/usa/campaign-updates/pointlessplastic-toolkit.



xi See the Break Free From Plastic website. www.breakfreefromplastic.org.

# Retailer Profiles





### #1 Whole Foods Market





Headquarters: Austin, TX

**Stores and Banners:** 467 stores operating as Whole Foods Market and Whole Foods Market 365

**Background:** Whole Foods is known for its natural and organic products. Amazon's acquisition of Whole Foods sent shockwaves throughout grocery retail.xiii Whole Foods has cut prices and has begun offering a series of perks, including discounts for Amazon Prime members. Its FY 2017 revenue was \$14 billion.67

**Greenpeace Comments:** Whole Foods continues its reign as the top-ranked retailer in this assessment. From launching its new tuna policy to continued advocacy initiatives for improvements in fisheries management, Whole Foods is remaining active on sustainable seafood. Recent reports have scrutinized Whole Foods regarding its lack of public labor standards (see page 7). As labor and human rights abuses persist in the seafood industry, Whole Foods has the opportunity to lead with the same tenacity as it has on sustainable seafood.xiv The retailer must also take action to tackle plastic pollution. While time will tell whether its recent acquisition by Amazon will affect future seafood-related decisions, for now Whole Foods remains the leader in this assessment.

**Sustainable Seafood Policy:** Whole Foods' seafood policy requires that it buy only seafood that is green or yellow rated according to Seafood Watch, or is in a time-bound FIP or AIP. The policy applies to its fresh/frozen seafood, shelf-stable tuna, and any prepared foods that use tuna. Its public canned tuna policy<sup>68</sup> is above and beyond that of any other retailer profiled. It is the only policy among profiled retailers that requires sourcing only one-by-one tuna (e.g., pole and line, handline, troll), and has traceability requirements that help ensure a sustainable and traceable product. A shopper interested in canned tuna can walk into any Whole Foods in the country, grab any brand of tuna on the shelf (private label or national brand), and be assured of its sustainability. This is no small feat.

Another unique element of Whole Foods is that it still relies on its own standards for farmed salmon, other finfish, and shrimp, instead of relying on incomplete third-party certifications. These standards raise the bar for aquaculture suppliers regarding environmental standards and animal welfare.

**Seafood Sustainability Initiatives:** Whole Foods conducts third-party audits to review its suppliers' farmed fish, shrimp, and mollusc aquaculture operations. While it reviews IUU vessel lists to ensure it is not inadvertently sourcing illegally caught tuna, Whole Foods should also reference these lists for any wild-caught species that it procures. Whole Foods does not have a policy on transshipment at sea in the tuna industry, although because it does not source from purse seine or longline fleets, this is essentially not an issue for its sourcing. The retailer also signed on to a 2018 tuna RFMO advocacy letter<sup>xv</sup> calling for fishery management improvements.

Whole Foods has been moderately active in reducing plastic pollution. It requires a minimum amount of post-consumer recycled plastic in the packaging for some items, and is actively considering alternatives for some of its in-store items (like single-use plates). However, it must swiftly and markedly strengthen its initiatives as the plastic pollution crisis worsens. Especially given Amazon's massive single-use plastic footprint, Whole Foods has an opportunity to set the bar for U.S. retail by developing a strong, comprehensive policy to phase out single-use plastics.

Labeling and Transparency: Whole Foods features prominent signage to inform customers about sustainable seafood choices and uses color-coded sustainability labels for each species in the wetcase. Through in-store flyers, brochures, and signage, the retailer communicates about various standards, including its own aquaculture standards. Whole Foods prioritizes transparency with its standards, publishing this information online and updating its customers and the public on its seafood sustainability milestones. Its private label tuna even carries a quick response (QR) code for consumers to use to learn more about the tuna's sourcing. This approach could be used to share more data about other products, further increasing Whole Foods' performance in this category.

**Inventory:** Despite its robust seafood standards, Whole Foods' desire to carry a wide selection of species continues to affect its inventory score. For example, instead of refusing to carry Chilean sea bass, Whole Foods sells an MSC certified product. While Whole Foods is certainly not the only retailer to use this loophole, it is disappointing to see an industry leader in so many other areas continue to use this strategy with such a sensitive species. Whole Foods should also discontinue bigeye tuna.

xiii For purposes of this report, Whole Foods is still being evaluated as its own entity.

www. Whole Foods should heed the call from labor groups like ILRF and support legally binding agreements for seafood workers' rights.

W Henceforth called "the 2018 tuna RFMO letter." This refers to a letter sponsored by a coalition of NGOs (the NGO Tuna Forum), which was first submitted to key RFMOs in May 2018, and will continue to accumulate business and NGO signatories throughout 2018. For more, see <a href="https://www.seafoodsource.com/news/environment-sustainability/118-organizations-make-sustainability-appeal-for-global-tuna-fisheries">www.seafoodsource.com/news/environment-sustainability/118-organizations-make-sustainability-appeal-for-global-tuna-fisheries</a>.

### #2 Hy-Vee



Overall Score 79.8 **Policy** 71 80.6 **Initiatives** 89.5 Transparency **78** Inventory

Headquarters: West Des Moines, IA

Stores and Banners: 245 stores operating as Hy-Vee and Hy-Vee Drugstore

Background: Hy-Vee is an employee-owned company with stores located in the Midwest. Its FY 2017 revenue was \$10 billion.

**Greenpeace Comments:** This Midwest retailer continues its rapid ascent in the rankings, and has moved ahead of Wegmans into second place. Hy-Vee was the category winner for the initiatives and the transparency categories. Hy-Vee has released a shelf-stable tuna policy, has finished converting all of its private label canned tuna to be sustainably sourced, and is investigating the concerns associated with transshipment at sea. Greenpeace encourages Hy-Vee to quickly complete its work to ensure, like Whole Foods, that all shelf-stable tuna sold in its stores is sustainable. Hy-Vee should build on its zerowaste initiatives to release strong public commitments and a policy to tackle single-use plastics, and join labor organizations like ILRF to support legally binding agreements for workers' rights in the seafood industry.

Sustainable Seafood Policy: Hy-Vee's seafood policy requires that it source only seafood that is green or yellow rated according to Seafood Watch, from a certified equivalent, or in a time-bound FIP or AIP. The policy encompasses its fresh and frozen seafood, shelf-stable, sushi, and deli categories. Since December 2017, Hy-Vee has sold only sustainable private label tuna (e.g., pole and line, FAD-free),69 and is currently working with its NGO partner FishWise on plans to ensure that any national tuna brands sold in stores also meet its policy. Given the relative strength of its shelf-stable tuna policy, it is odd that Hy-Vee has a preferential sourcing requirement of ISSF participating companies, which would not ensure Hy-Vee receives sustainable, ethical shelf-stable tuna (see page 9). Hy-Vee should seek to emulate Whole Foods' policy, 70 only source one-by-one caught tuna, and stick with its stronger policy standards that go beyond ISSF's insufficient supplier requirements. While Hy-Vee appears to have extensive internal social standards, in contrast to some other top-five ranked retailers, Hy-Vee lacks a comprehensive public policy regarding labor and human rights.

Seafood Sustainability Initiatives: Hy-Vee conducts supply chain audits to determine whether its products are in compliance with its sustainability, traceability, and IUU fishing/social risk standards. The retailer relies on the combined Trygg Mat Tracking IUU vessel list<sup>71</sup> to identify whether the listed vessels are linked to its supply chains. Hy-Vee is currently considering its approach to addressing transshipment at sea in the tuna industry, and signed the 2018 tuna RFMO letter, building on years of calling for improved RFMO fisheries management. To further integrate its focus on ethical seafood procurement, Hy-Vee should support ILRF's call to action for legally binding agreements that protect seafood workers' rights (see pages 7-8).

In conjunction with its distribution subsidiary Perishable Distributors of Iowa, Hy-Vee has focused on waste reduction, including plastics recycling and encouraging its customers to use reusable bags. Because recycling alone will not solve the global plastic pollution crisis, Greenpeace urges Hy-Vee to build on its sustainable seafood leadership and announce bold commitments to phase out single-use plastics in its operations.

Labeling and Transparency: Hy-Vee's Seafoodies blog<sup>72</sup> educates its customers on sustainable seafood and even advises them which species to avoid (e.g., Chilean sea bass). On multiple industry conference panels, Hy-Vee representatives make a concerted effort to explain to others in the industry why sustainability makes business sense, and to urge action among their peers. In stores, its staff is trained to answer sustainability questions. Hy-Vee places a "Responsible Choice" label on service cases, the frozen section, sushi bars, in-store restaurants, and the canned tuna aisle for products that are green or yellow rated by Seafood Watch or a certified equivalent. Hy-Vee can improve by providing additional traceability labeling at the point of sale, whether on the packaging itself, through signage, or in other displays.

Inventory: Greenpeace commends Hy-Vee for avoiding Chilean sea bass for sustainability reasons, and communicating this policy to its customers.73 Other top-five retailers Whole Foods and Giant Eagle should take note of this leadership. According to its seafood policy, Hy-Vee works to mitigate concerns associated with its wild-caught and farmed sourcing, which it employs with Atlantic cod, for example. However, Hy-Vee's reintroduction of Atlantic cod and the need to improve its pangasius sourcing precipitated a drop in its inventory score. As Hy-Vee works to improve the sustainability of national canned tuna brands sold in its stores, it should also ensure that any salmon and shrimp sold is green rated by Seafood Watch.

### #3 AI.DI

**Overall Score** 71.9



Policy 75.6 68.4 **72 Initiatives** Transparency 71.5 Inventory

Headquarters: Batavia, IL

Stores and Banners: 1,695 stores operating as ALDI

Background: ALDI US ("ALDI") is a rapidly expanding discount chain that sells mostly private label products, and is owned by German parent company ALDI Süd. Its FY 2017 revenue was \$16.8 billion.

Greenpeace Comments: ALDI made enough progress this year to earn a spot in the green category. Greenpeace applauds the retailer for this first-time achievement. Since the last assessment, ALDI has been busy: it released a comprehensive shelf-stable tuna policy, launched a sustainable line of private label canned tuna, and has advocated for tuna fisheries management improvements. ALDI should continue to improve its tuna procurement, especially its longline caught albacore, as well as strengthen its farmed salmon and shrimp sourcing. Like every profiled retailer, ALDI needs a comprehensive policy to phase out single-use plastics and should build on its social compliance policies by joining ILRF's call to action for legally binding agreements to protect seafood workers' rights.

Sustainable Seafood Policy: ALDI has a public policy that covers its seafood storewide. It consults FishSource to inform its sourcing, particularly for its wild-caught assortment, and it will only source from FIPs that achieve an A, B, or C rating as assessed by SFP. ALDI may preferentially source MSC or Best Aquaculture Practices (BAP) certified products, and for shelf-stable tuna, its policy requires preferential sourcing of pole and line or FAD-free tuna. While ALDI also preferentially sources albacore from mitigated longlines (e.g., circle hooks), this alone will not comprehensively guarantee sustainability, as noted in an SFP guide on longline bycatch mitigation.74 And given concerns with transshipment at sea (see page 9), ALDI would fare better to switch to pole and line tuna altogether. ALDI could benefit from strengthening its policy so that it sells only sustainably caught tuna storewide, which should be easier to accomplish because it does not sell any national tuna brands. Such a move would put ALDI shoulder to shoulder with Whole Foods on selling only sustainable canned tuna; no shopper could mistakenly purchase a can of destructively caught tuna.

Seafood Sustainability Initiatives: ALDI was among the first U.S. retailers to release a public shelf-stable tuna policy. ALDI permits transshipment at sea only with 100% observer coverage, and signed the 2018 tuna RFMO letter. Greenpeace commends ALDI on its social standards, which are publicly available and more robust than those of most retailers. As a signatory of the Accord on Fire and Building Safety in Bangladesh,75 this suggests that ALDI recognizes the value of legally binding agreements between businesses, NGOs, and labor unions to improve workers' safety and rights. Given that social certifications and initiatives like the Seafood Task Force alone will not create the transformation needed, Greenpeace urges ALDI to build on its work in the textile industry and join ILRF's call to action for legally binding agreements in the seafood industry (see pages 7-8).

ALDI appears to be in the early stages of developing a larger strategy to address single-use plastics, which is encouraging because U.S. retailers need to quickly address the plastics crisis. Especially given its business model focused on private label products, ALDI has the potential to markedly reduce its reliance on single-use plastics and set the bar for other retailers to follow.

Labeling and Transparency: ALDI leads among profiled retailers regarding on-package labeling of seafood products: it communicates to customers the species' scientific name, catch or production method, and Food and Agriculture Organization (FAO) catch area (if applicable). ALDI should publish this information on its website or elsewhere online. For example, other retailers like Publix, Walmart, and Giant Eagle have opted to provide some of their wild-caught sourcing data online via ODP. ALDI could go further by also disclosing its farmed sourcing data, and ensuring data for all of its seafood sold in stores are available through this resource.

Inventory: ALDI is among the top performers in this category, in part because it carries a limited variety of seafood. It also tends to source certified products, which can sometimes help mitigate issues associated with species like shrimp and farmed salmon. However, no certification fully addresses the environmental issues associated with these species. Furthermore, most popular certification schemes ignore or ineffectively address serious labor and human rights concerns in seafood supply chains (see page 8). ALDI sells both pole and line and FAD-free skipjack tuna, and its yellowfin tuna is either handline caught or FAD-free. ALDI needs to improve its albacore tuna sourcing immediately.

### #4 Target

Overall Score 70.8



Policy 78.3 73.3 59.5 Inventory 72 **Initiatives** Transparency

Headquarters: Minneapolis, MN

Stores and Banners: 1,834 stores operating as Target, CityTarget, and TargetExpress

Background: Target continues to invest in its grocery division, acquiring Shipt to better compete in online grocery delivery as it spends \$1 billion to modernize stores. Its FY 2017 revenue (for consumables) was approximately \$30.9 billion.

Greenpeace Comments: Since 2010, Target had one constant source of pride: unlike every other profiled retailer, it never buckled under industry pressure to sell farmed salmon, instead carrying only sustainably caught wild salmon. Until now. Since the last survey Target has quietly begun selling farmed salmon once again. Industrialfarmed salmon is a dirty business, 76, 77 and unfortunately Target is once again a customer. Due to improvements in other areas, Target's overall score improved slightly from the last assessment, enough to push it from 5th place to 4th place. To remain in the top five, Target has to improve its seafood procurement, tackle plastic pollution, and ensure workers' rights throughout its supply chains.

Sustainable Seafood Policy: In November 2017, Target expanded its publicly available sustainable seafood policy to include shelf-stable tuna and sushi. Target is working with its NGO partner FishWise to develop a strategy and timeline to transition its unsustainable shelfstable tuna products to sources that meet its policy. The retailer requires that its seafood be green or yellow rated according to Seafood Watch, from a certified equivalent, or in a "credible, 'timebound improvement process." All of Target's farmed seafood is either BAP or Aquaculture Stewardship Council (ASC) certified. Despite Target's public commitment to not sell GE seafood, it is unclear whether this policy applies only to its private label Simply Balanced products, or also to national brands.

Seafood Sustainability Initiatives: Target relies on internal and external audits to assess its supply chain, and is involved in various industry-led fora to address seafood traceability and human rights abuses in the seafood industry, xvi though doubts remain as to the effectiveness of these bodies. To help make transformative changes in the global seafood industry, Target should embrace ILRF's call to action for legally binding agreements to protect seafood workers' rights (see pages 7-8). Target is currently investigating the issues associated with transshipment at sea in the tuna industry. Greenpeace urges Target to require strong supplier standards if it opts to continue sourcing transshipped tuna, and not to outsource its position to insufficient standards such as ISSF (see page 9). Target has joined a growing number of businesses and NGOs calling on tuna RFMOs to improve their fisheries management.

Target has a guideline to avoid using polyvinyl chloride (PVC) and is working to eliminate polystyrene packaging in its own brands. The retailer must significantly ramp up its efforts to phase out single-use plastic packaging to more effectively mitigate its role in the global plastics crisis.

Labeling and Transparency: Target has improved in this category since the last assessment, though it is not fully on par with its higher scores in the other categories. Target has finally devoted some onpackage labeling and in-store signage to sustainability messaging. As the retailer continues to focus on traceability and ethical supply chains, it should also make a point to communicate to the public updates regarding these initiatives, like it does on its progress toward compliance with its seafood policy.

Inventory: Target dropped in this category following the last assessment, reflecting its regrettable decision to reintroduce farmed salmon. Target should discontinue farmed salmon, and stick with wild-caught salmon. Fortunately, the company does not sell red list species such as orange roughy or Chilean sea bass. As some retailers succumb to reintroducing these species with the promise of "certified sustainable," Greenpeace urges Target to keep these species off its shelves. Target should improve its farmed shrimp procurement and ensure all tuna sold in its stores, even national brands, is sustainably sourced.

xvi E.g., Seafood Task Force, Global Dialogue on Seafood Traceability.

### **#5** Giant Eagle



Overall Score



Headquarters: Pittsburgh, PA

Stores and Banners: 412 stores operating as Giant Eagle, Giant Eagle Express, Market District, Market District Express, and GetGo

Background: Giant Eagle is a privately owned, regional retailer, with its largest presence in Pennsylvania and Ohio. Its FY 2017 revenue was \$8.9 billion.

**Greenpeace Comments:** Giant Eagle was the dark horse of this year's rankings, climbing six spots to round out the top five—an impressive feat for a retailer that was ranked 16th just a few years ago. After being the first U.S. retailer to release a shelf-stable tuna policy, it introduced a pole and line private label canned albacore product. Now, Giant Eagle needs to convert the rest of its shelf-stable category (private label and national brands) to sustainable sourcing. The retailer advocates for better fisheries management and has increased its transparency, from sharing its policies to publishing some of its sourcing data online. Greenpeace commends Giant Eagle for its yearover-year improvements, and urges the retailer to join the rest of the top-five retailers by discontinuing orange roughy and most<sup>xvii</sup> top-five retailers by discontinuing Chilean sea bass. Both are long-lived, slowgrowing species that—based on sustainability and/or IUU fishing concerns—should not be commercially available, regardless of MSC certification.

Sustainable Seafood Policy: Giant Eagle primarily relies on the FishSource database to inform its procurement, and sources from a variety of FIPs, most of which are performing well. While the retailer has basic wild-caught standards, they could be strengthened with regard to how it ensures supplier compliance. Giant Eagle's farmed seafood standards could be interpreted as "carry as much BAP certified product as possible" based upon its actual inventory, but this could also be clarified. Virtually all of its inventory is BAP 2-star certified, and for farmed salmon, tilapia, and private label shrimp, Giant Eagle carries up to 4-star certification. Its canned tuna policy requires 100% observer coverage and has a goal to avoid sourcing from longline vessels that transship at sea.

Seafood Sustainability Initiatives: Giant Eagle takes a proactive approach to ensure that its suppliers are well versed in seafood sustainability and that they understand the company's expectations.

Surprisingly, the retailer lacks a social responsibility code of conduct, and must address this oversight immediately. Especially given rampant labor and human rights abuses in the industry, relying on third-party certifications is inadequate; instead, leading retailers should support legally binding agreements that protect workers' rights (see pages 7–8). Giant Eagle added its support for improved fisheries management by signing the 2018 tuna RFMO letter.

While Giant Eagle has taken steps to reduce the amount of plastic bags used in stores, it does not have a comprehensive single-use plastic reduction policy or commitments to address its contribution to the global plastics crisis. This should be of utmost priority as Giant Eagle moves forward in its responsible seafood program.

Labeling and Transparency: Giant Eagle has made some data on its wild-caught sourcing available online via ODP. While encouraging, it must ensure that all data on seafood it sources, including farmed, are also available through this transparency initiative. The retailer has also increased its in-store labeling for customers, and has released a video detailing its commitment to sustainable seafood. Giant Eagle should continue to update its customers and the public on its efforts to improve on seafood sustainability and social responsibility.

Inventory: This is Giant Eagle's weakest category. Similar to some other retailers, it over-relies on eco-certifications. Simply because a fishery is MSC certified does not necessarily mean it is ethical or sustainable (see page 8). To continue to remain in the top five, Giant Eagle should immediately discontinue sales of orange roughy and Chilean sea bass. Greenpeace commends Giant Eagle for dropping tongol tuna because of sustainability concerns and poor management, and urges the retailer to use this momentum to improve its skipjack tuna sourcing, and ensure that the rest of its private label and national brand shelf-stable tuna is sustainable (e.g., pole and line). Giant Eagle's farmed seafood is probably its most stringent sourcing. However, industrially farmed salmon and farmed shrimp-however mitigated-are still associated with a host of environmental and social problems.

xvii Surprisingly, Whole Foods continues to sell Chilean sea bass, despite sustainability and IUU fishing concerns.

### #6 Wegmans



Overall Score





Headquarters: Rochester, NY

**Stores and Banners:** 97 stores operating as Wegmans

Background: Wegmans is a regional, family-owned and -operated retailer based in the U.S. Northeast, and has a growing presence in Virginia. Its FY 2017 revenue was \$8.7 billion.

**Greenpeace Comments:** Three short years after it was on the heels of Whole Foods for the number-one ranking, and following the departure of a veteran sustainable seafood champion, Wegmans' ranking dropped from an industry leader to a modest performer. Wegmans' jaw-dropping decision to procure both orange roughy and farmed Pacific bluefin tuna (for special events) has made it the only previously green rated retailer to either introduce or reintroduce such top-priority red list species. Greenpeace is concerned about these developments, and urges Wegmans to heed the warnings from many other NGOs and scientists regarding species like orange roughy and bluefin tuna, as well as maintain its focus on sustainable seafood.

Sustainable Seafood Policy: Wegmans' sustainable seafood policy cove<mark>rs fresh and</mark> frozen seafood, and shelf-stable tuna. While it relies on SFP for advice, Wegmans simply requires MSC certification, a FIP, or the seafood to be caught in domestic waters. Its standards for farmed products could use clarification. Wegmans boasts 100% traceability, but works with the Global Aquaculture Alliance and ASC "when appropriate" indeed, much of its supply is derived from these certified sources. To its credit, Wegmans lists best practices for farmed salmon, but does not specify if these practices are required of suppliers. While Wegmans suggests that it will not sell GE salmon (or seafood), 80 it should commit to doing so and state this in its public seafood policy, especially since GE salmon is now available on the market.81

Seafood Sustainability Initiatives: Wegmans relies on SFP and Trace Register to determine whether wild-caught seafood is coming from legal sources. The retailer indicates it has 100% traceability for all of its farmed seafood. While Wegmans has a social code of conduct, it is unclear what standards are included in its internal policy. Wegmans should make this policy public and work with respected labor and human rights organizations to ensure its standards and grievance mechanisms are satisfactory. Furthermore, it should support legally

binding agreements to protect seafood workers' rights (see pages 7-8). Wegmans is active in the public policy arena, from supporting marine reserves to stopping IUU fishing, and most recently signing the 2018 tuna RFMO letter urging improved fisheries management.

Wegmans has partnered with a private-sector company and a research entity to test packaging innovations that either substantially reduce the amount of virgin plastic used or replace it entirely with plant-derived substances. Greenpeace commends Wegmans on its initiatives and, especially because recycling cannot fix this problem (see page 12), urges Wegmans to announce ambitious commitments to phase out single-use plastics altogether.

Labeling and Transparency: The updated Wegmans website removed some seafood traceability information that was available years ago (e.g., species-by-species pictures and geographical sourcing information). However, to its credit, its rebranded site still features a substantial amount of policy information and specific ecocertifications for farmed seafood products.

Earlier in 2018, Wegmans partnered with the National Aquarium to promote responsible aquaculture via an in-store pilot program in the seafood department called "Seafood Smart." The retailer has communicated to its customers information about its private label pole and line shelf-stable tuna through direct mail, signs at the point of sale, product demos, and at its pharmacy counters. Greenpeace hopes that Wegmans applies this same level of energy to other items in its wild-caught inventory, and ensures that the Seafood Smart program does not inadvertently steer customers toward some of the less responsibly farmed products that it currently sells.

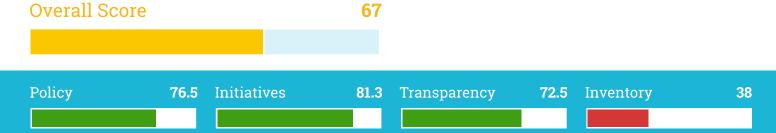
Inventory: Wegmans dropped significantly in this category with its introduction of orange roughy and farmed Pacific bluefin tuna (the latter only available at special events). In general, Greenpeace acknowledges retailers' efforts to use their buying power to make improvements (e.g., FIPs and AIPs). And even though this may be Wegmans' intent, it is highly problematic, as orange roughy and Pacific bluefin tuna (both wild and farmed stocksxix) are so imperiled that they should not be commercially available, regardless of any certifications or attempts at improvements. Wegmans must get back on track and discontinue these species immediately.

xmiii This education program seeks to inform customers of responsibly harvested fish, shellfish, and sea vegetables. Later in 2018, Wegmans plans to expand this transparency initiative

xiix Wild Pacific bluefin tuna stocks have been decimated, and farming even hatchery-raised Pacific bluefin tuna is a wasteful, destructive enterprise. Farming large predators has a high environmental cost (and net protein loss) in terms of wild-caught fish used for feed, which could also directly compete with imperiled wild Pacific bluefin tuna populations. And there are many additional concerns (e.g., forcing a highly migratory species to live in cages, lack of data and government regulation, risks farms pose to blacktip reef sharks, effluent, antibiotic use, potential for disease transfer from farmed to wild fish). Greenpeace urges Wegmans to swiftly discontinue selling bluefin tuna of any kind. For more information, see Seafood Watch's assessment: www.seafoodwatch.org/-/m/sfw/pdf/reports/t/mba\_seafoodwatch\_bluefintuna\_japanfarmedreport.pdf.

### **#7 Albertsons Companies**





Headquarters: Boise, ID

**Stores and Banners:** More than 2,300 stores operating as Albertsons, Safeway, Vons, Jewel-Osco, Shaw's, Acme, Tom Thumb, Randalls, United Supermarkets, Pavilions, Star Market, Carrs, and Haggen

**Background:** This is the first assessment that profiles Albertsons and Safeway together, both operating as banners of Albertsons Companies ("Albertsons"), now one of the largest grocery retailers in the United States. Albertsons is expanding its online grocery delivery capabilities with Instacart and owns meal-kit company Plated. Its FY 2017 revenue was approximately \$60.2 billion.

**Greenpeace Comments:** After years of inaction, Albertsons is making a concerted effort to tackle seafood sustainability, and has recently partnered with FishWise and Trace Register to ensure that 94% of its seafood will be green or yellow rated according to Seafood Watch (or be in a measurable, time-bound FIP or AIP) by 2022. While Albertsons did not achieve a green ranking, which its former competitor (and now subsidiary) Safeway held, it performed well, with strong scores in three out of four ranking criteria. However, Albertsons outright failed the inventory category, clearly indicating where it needs to most improve. Especially given the size of its footprint, the faster Albertsons can reach its 2022 goals, the better.

Sustainable Seafood Policy: Albertsons is actively implementing improvements to ensure by 2022 that all of its seafood is Seafood Watch green or yellow rated, from a certified equivalent, or in a time-bound and measurable FIP or AIP. This policy applies to all of its fresh, frozen, and shelf-stable seafood, including sushi made in its prepared foods department. The retailer has also publicly stated that it will not carry GE salmon.83 Greenpeace applauds Albertsons for making good on its policy commitment to discontinue eel, given the endangered status of wild-caught freshwater eel, the environmental impacts of farmed eel, and the illegal activity associated with the eel trade. Albertsons not only took action, it also began with a public commitment and then followed with additional press when it had discontinued eel, communicating why action is necessary.84 Other retailers should follow Albertsons' lead by discontinuing eel, and Albertsons should continue with this level of ambition as it implements its broader seafood policy.

**Seafood Sustainability Initiatives:** Albertsons usually conducts external audits annually, now works with Trace Register to conduct internal inventory audits in real time, and is establishing protocols

to monitor IUU vessel lists. Greenpeace commends Albertsons for beginning to ask tough questions of its tuna suppliers, including identifying how to address transshipment at sea within its supply chains. Albertsons has supplier standards for labor and human rights, and as a member of the Seafood Task Force, it must adhere to its code of conduct. However, it must go further by supporting legally binding agreements to protect workers' rights (see pages 7–8). The retailer is well engaged in the policy arena, including publicly supporting improved tuna fisheries management.

Albertsons has also discontinued Styrofoam trays in some markets, has reduced the volume of plastics used in milk jugs and water bottles, has encouraged industry to use plant-based meat trays instead of polystyrene, and is actively seeking advocacy and innovation opportunities to realize additional reductions. Albertsons should build on this work by announcing a public commitment and timeline to phase out its reliance on single-use plastics.

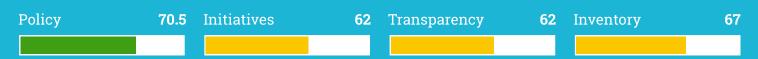
Labeling and Transparency: Albertsons works with several external partners to improve its operations, promote its sustainability initiatives, and educate the public through a variety of online methods. Similar to other FishWise-partnered retailers, Albertsons has increased its media coverage of its various initiatives, from progress updates on its sustainable seafood program, to when it joined the Seafood Task Force, and most recently to when it discontinued eel. Other retailers should take note; this is how to keep customers, industry, and NGOs well informed about the case for sustainability and how to collectively work toward improvements. Albertsons' in-store labeling for customers is a bit sparse and needs more attention. Greenpeace urges the retailer to make more traceability and sustainability information available at the point of sale.

**Inventory:** As one of the largest U.S. retailers, it is problematic that Albertsons performed poorly in this category. Fortunately, this should change as Albertsons discontinues red list species and implements its sustainable seafood policy. Albertsons should lead with the same principled approach that it did with eel, and immediately discontinue orange roughy, Chilean sea bass, and bigeye tuna. Additionally, it must rapidly transition to improved sourcing for most of its other high-volume products and continue to make improvements in its fresh, frozen, and shelf-stable tuna categories (i.e., only sell sustainable private label and national brand products).

### **#8 Sprouts Farmers Market**







Headquarters: Phoenix, AZ

Stores and Banners: 300 stores operating as Sprouts Farmers Market

Background: Sprouts is a rapidly growing national retailer, with its highest concentration of stores in California and Texas. Its FY 2017 revenue was approximately \$4.7 billion.

Greenpeace Comments: Sprouts' 2018 debut in Carting Away the Oceans was strong, even scoring higher in the inventory category than most retailers, including Whole Foods. Sprouts is investing in staff education and online and in-store communications about its sustainable seafood initiatives—a great move that will better inform its customers about sustainable seafood. As Sprouts increases its market share, it also has an increased responsibility to leverage its brand and buying power for marked improvements in the seafood industry. Sprouts needs to publicly advocate for better fisheries management and for workers' rights, and announce strong commitments to reduce single-use plastics in its operations.

Sustainable Seafood Policy: Sprouts recently released its seafood policy on its website. By 2020, Sprouts has a goal to source only from the following certified sources for all of its fresh, frozen, and selfstable seafood: BAP (3 star and higher), MSC, ASC, Alaska Responsible Fisheries Management, or Iceland Responsible Fisheries. Especially given concerns about reauthorization of the Magnuson-Stevens Act, it is imperative for Sprouts and other retailers relying on U.S. fisheries standards to advocate for strong, science-based protections. Currently, about two-thirds of Sprouts' wild-caught seafood is MSC certified, and the remainder is either in a FIP or not certified. As Sprouts implements its policy, it must also consider the shortcomings of eco-certifications, which alone will not ensure sustainable seafood (see page 8). Two-thirds of its private label canned tuna is pole and line, with a goal of 100% by end of 2019. Sprouts will not purchase GE seafood, including GE salmon.

Seafood Sustainability Initiatives: Sprouts prohibits transshipment at sea unless there is 100% observer coverage. Sprouts conducts some third-party audits and has supplier agreements regarding legal and ethical procurement; however, given continued labor and human rights abuses in the seafood industry, it should strengthen its social standards and support initiatives like ILRF's call for legally binding agreements (see pages 7–8). It is unclear what Sprouts has done recently to advocate for improvements in fisheries management. With its new policy and public communications strategy, the retailer should use this momentum to advocate publicly for improvements, such as signing the 2018 tuna RFMO letter.85

Sprouts engages its private label suppliers on plastic packaging alternatives; it has a milk bottle take-back program in many stores to mitigate the need for single-use plastic milk jugs; and it is piloting the use of reusable and refillable containers for bulk honey, vinegar, and oil. To build on these initiatives, Sprouts could set the bar for U.S. retail with a comprehensive plan to reduce single-use plastics.

Labeling and Transparency: At the time of this writing, Sprouts has yet to robustly engage its customers either online or in stores about its sustainable seafood policy and products. Fortunately, Sprouts is focusing on a communications plan this year and also has plans to label certain products with sustainability information. As these initiatives roll out, Sprouts' performance will improve in this category.

Inventory: Sprouts performed better than most retailers in this category. It does not carry several red list species for sustainability reasons, including orange roughy, Chilean sea bass, shark, and bigeye tuna. Greenpeace applauds Sprouts for this leadership and encourages it to stipulate in its seafood policy that it will not sell orange roughy, Chilean sea bass, and bigeye tuna in the future. The retailer is also making improvements in the shelf-stable tuna category and working to improve its swordfish procurement. Sprouts must improve its sourcing of Atlantic cod and grouper, among other species.

### #9 Ahold Delhaize







Headquarters: Quincy, MA, and Salisbury, NC

Stores and Banners: 1,960 stores operating as Stop & Shop, Giant, Martin's, Food Lion, and Hannaford

Background: In the previous assessment, Ahold and Delhaize were profiled separately. Following their 2016 merger, this is the first time that Ahold and Delhaize are profiled together. Ahold Delhaize USA continues to represent the largest share of the Dutch-owned global grocery giant's portfolio. Its FY 2017 revenue was \$42.3 billion.

**Greenpeace Comments:** While it is difficult to exactly compare the merged company's performance with the separate evaluations of Ahold and Delhaize in 2015, its overall score increased slightly and its ranking remains largely the same. Ahold Delhaize's policy and transparency scores improved, although the retailer experienced a noteworthy drop in the inventory category, attributed largely to its lack of sustainable tuna options. As rivals Albertsons and Kroger continue to implement improvements and climb in the rankings, Ahold Delhaize has a chance to follow suit, or risk losing its standing as a top-ten retailer in this assessment. With procurement improvements and a focus on initiatives such as reducing its single-use plastic footprint, Ahold Delhaize can continue to remain competitive in this assessment and among the nation's largest retailers advocating for sustainable seafood and healthy oceans.

Sustainable Seafood Policy: Ahold Delhaize's sustainable seafood policy applies to its fresh, frozen, and shelf-stable categories. Its policy for wild-caught seafood is encouraging, but by consulting so many outside standards (MSC, ASMI, or IRF certified, or assessed by GMRI, New England Aquarium, or Seafood Watch yellow and higher, or in a CASS certified FIP)xx, this alphabet soup of acceptable wildcaught seafood results in little clarity regarding what is not allowed to be carried due to sustainability concerns. Ahold Delhaize must narrow its focus. The retailer's policy toward farmed seafood is clearer: it requires products that are at least 2-star BAP certified or equivalent, and products that are produced in a high-risk country to be audited against a Business Social Compliance Initiative or an equivalent social compliance standard. For shelf-stable tuna, Ahold Delhaize appears to require its suppliers only to be ISSF members, which will not ensure sustainable tuna or address high-risk practices like transshipment at sea with longline vessels (see page 9).

Seafood Sustainability Initiatives: Food Lion and Hannaford banners work with Trace Register to conduct internal inventory audits in real time. Ahold Delhaize aims to expand this capability for its other banners. As a Seafood Task Force member, and requiring that suppliers undergo social compliance review (in certain high-risk countries), Ahold Delhaize is working to address social responsibility in such a risky industry; however, it should engage labor and human rights organizations to ensure it is taking strong enough action. The retailer should join ILRF's call to action for legally binding agreements for workers' rights in the seafood industry (see pages 7-8). Additionally, Ahold Delhaize must take a position on transshipment at sea, to mitigate the environmental and human rights risks associated with this practice. The retailer uses its brand and buying power to publicly call for industrywide improvements, most recently by signing the 2018 tuna RFMO letter advocating for improved fisheries management.

Unfortunately, Ahold Delhaize is failing to adequately reduce its reliance on single-use plastics. As a top-five U.S. retailer by sales, Ahold Delhaize has a responsibility to lead and help tackle the global plastic pollution crisis.

Labeling and Transparency: Ahold Delhaize scored higher than both Ahold and Delhaize in the transparency category in the last assessment. Each of its banners conducts staff trainings and features its seafood policy online to engage customers in sustainable seafood questions. Ahold Delhaize features in-store signage that includes QR codes for traceability purposes, and notes "sustainable choice" products for customers. The retailer frequently participates in industry conferences and panels, as well as initiatives (e.g., Seafood Task Force, Food Marketing Institute, Global Sustainable Seafood Initiative (GSSI)). Ahold Delhaize should continue to provide customers information online and at the point of sale, including updates on its progress with responsible seafood procurement. It also has an opportunity to include sustainability information with its Peapod grocery delivery service.

Inventory: This is Ahold Delhaize's weakest category. In 2017, Greenpeace reported favorably on Ahold Delhaize's pole and line tuna through its Nature's Promise brand, which unfortunately has been discontinued, along with its entire private label line. Rather than discontinue sustainable tuna, Ahold Delhaize should stop selling Chilean sea bass, and improve its sourcing of swordfish (or discontinue it altogether). Ahold Delhaize needs to swiftly turn a corner and invest in sourcing improvements like many other top-ten retailers.

<sup>\*\*</sup>ASMI: Alaska Seafood Marketing Institute; IRF: Iceland Responsible Fisheries; GMRI: Gulf of Maine Research Institute; CASS: Conservation Alliance for Seafood Solutions.

### #10 Meijer



**Overall Score** 





Headquarters: Grand Rapids, MI

Stores and Banners: 237 stores operating as Meijer and one as Bridge Street Market

Background: Meijer is a family-owned retailer with stores in Michigan, Ohio, Indiana, Illinois, Kentucky, and Wisconsin. Meijer is testing a smaller, urban store concept (Bridge Street Market) in Grand Rapids, MI. Its FY 2017 revenue was approximately \$18.9 billion.

**Greenpeace Comments:** Meijer's score improved slightly since the last assessment, although as Giant Eagle, Albertsons, and Sprouts entered the top ten, Meijer's overall ranking did not change. The retailer has significantly improved its private label canned tuna, plans to increase its transparency on wild-caught sourcing, and is working to update its seafood policy. Meijer performed relatively well in the inventory category, although it must improve its Atlantic salmon procurement. The retailer has room for improvement on public advocacy, particularly regarding fisheries management, and needs to release a comprehensive, public plan to reduce single-use plastics in its operations.

Sustainable Seafood Policy: Meijer's sustainable seafood policy covers its wild, farmed, and shelf-stable categories. Meijer relies on its NGO partner SFP's advice for its sourcing decisions, particularly regarding wild-caught seafood. Meijer requires MSC (or equivalent) certifications or FIPs for its wild-caught seafood procurement. For farmed seafood, it is striving for BAP 4-star certification across all species. Meijer is currently updating its seafood policy, and should reaffirm its public commitment to prohibit sourcing GE seafood, implement measures that address problematic transshipment at sea (see page 9), and account for gaps in eco-certifications (see page 8). Meijer has a public supplier code of conduct, which includes basic standards on labor and human rights.

Seafood Sustainability Initiatives: Meijer engages in internal and external audits for most of its products, and has significantly improved its private label tuna. All of its private label shelf-stable

skipjack, albacore, and yellowfin tuna is pole and line caught. The next step for Meijer is to ensure that the rest of its shelf-stable tuna (i.e., national brands) is more responsibly sourced, like Whole Foods. Meijer could improve in the initiatives category by sharing any updates on its efforts to influence responsible fisheries or aquaculture management at the local, national, or international level. At the time of this writing, Meijer has not joined a growing number of retailers in 2018 calling on tuna RFMOs to improve on fisheries management.86

It is unclear how Meijer will comprehensively work to phase out single-use plastics, since its efforts to shift to more recyclable plastics alone will not solve the problem. Placing the burden squarely on the consumer will do little to stem the onslaught of single-use plastic pollution into our oceans.

Labeling and Transparency: Meijer promotes its sustainable seafood program and provides some traceability information online, but needs to do far more to communicate to customers at the point of sale in stores. Fortunately, it appears that Meijer is working to provide more information about its seafood procurement. The retailer is active on sustainable seafood in retail industry gatherings, and is especially outspoken regarding seafood fraud. This advocacy is timely, as IUU fishing and other scandals highlight the challenges with traceability in the U.S. seafood industry.87

Inventory: Meijer performed better than many retailers in this category, and has avoided sourcing problematic red list species. Greenpeace applauds Meijer for not selling orange roughy and Chilean sea bass, and encourages it to maintain this course. According to survey results, its Atlantic salmon procurement must be swiftly improved. Additionally, to complement its improvements in canned tuna, Meijer should discontinue bigeye and tongol tuna, given sustainability concerns, poor management, and lack of fisheries data (for tongol tuna) to ensure proper management.

### #11 Kroger

### **Overall Score**





**Policy** 72.5 **Initiatives** 69.5 Transparency 61.5 Inventory 42

Headquarters: Cincinnati, OH

Stores and Banners: 2,782 supermarkets and multi-department stores88 operating as Kroger, Ralphs, Dillons, Smith's, King Soopers, Fry's, QFC, City Market, Owen's, Jay C, Pay Less, Baker's, Gerbes, Harris Teeter, Pick 'n Save, Copps, Metro Market, Mariano's, Fred Meyer, Food 4 Less, and Foods Co89

Background: The Kroger Co. ("Kroger") is the second largest U.S. retailer behind Walmart and, like Walmart, has markedly increased its store count and revenue since the last assessment. In a counter to Amazon, Kroger debuted ClickList, allowing customers to order online groceries that are then bagged and ready for store pickup, and is planning to use automated warehouses to fulfill online grocery orders with UK firm Orcado.<sup>90</sup> Kroger's FY 2017 revenue (for consumables) was approximately \$117.9 billion.

**Greenpeace Comments:** After years of lackluster performance, Kroger improved significantly in this year's assessment. The retailer performed best in the policy and initiatives categories, making progress on its sustainable seafood goals and using its brand and buying power to advocate for fisheries reforms ranging from the global tuna industry to domestic fisheries. As Kroger achieves its sustainability goals, Greenpeace urges the retailer to account for gaps in eco-certifications (see page 8). Kroger must improve in the inventory category—the retailer still sells MSC certified species that even its NGO partner World Wildlife Fund (WWF) agrees are problematic. 91 As plastic pollution continues to choke our oceans and the very seafood Kroger aims to sell for the foreseeable future, the retailer must release strong public commitments and a policy to reduce its reliance on single-use plastics (see page 12).

Sustainable Seafood Policy: Kroger's improved sustainable seafood policy applies to wild-caught and farmed seafood, and shelf-stable tuna. The retailer has a wild-caught seafood goal of 100% MSC (or equivalent) certification or in a FIP by 2020, and is currently 86% of the way there for its fresh and frozen categories. For farmed seafood, Kroger carries mostly BAP 2-star products, and is working to achieve BAP 4-star certification for its private label products only. Kroger should expand this goal to cover all farmed seafood it sells. While Greenpeace does not endorse either of these certification schemes, at least Kroger provides measurable standards by which to track its progress. Kroger's policy for shelf-stable tuna is weak, as it merely

requires that suppliers be ISSF members. This does not ensure sustainable tuna or address problem practices like transshipment at sea with longline vessels (see page 9). Kroger has publicly committed to not sell GE seafood.

Seafood Sustainability Initiatives: Kroger conducts annual sustainability audits, including a focus on potential IUU seafood. Kroger has a vendor code of conduct and a social audit program. The retailer is known to proactively use its buying power with suppliers when sustainability and labor abuse pose risks to its supply chains. Greenpeace urges Kroger to support legally binding agreements for seafood workers' rights (see pages 7-8). Kroger has recently signed multiple advocacy letters in support of improved tuna fisheries management and has sent letters to Louisiana state officials calling for sustainable fisheries management.

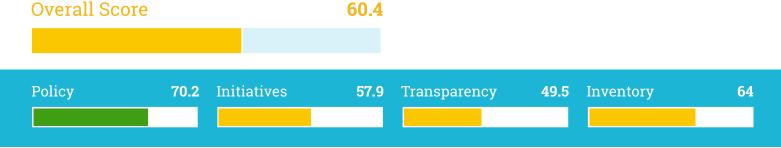
Kroger has increased its use of reusable plastic crates for internal distribution, has reduced the volume of plastics used in milk jugs and water bottles, and has recycled more than 60 million pounds of plastics since 2016. However, because recycling alone will not solve the plastics crisis, Kroger must unveil a robust, ambitious plan for reducing single-use plastics.

Labeling and Transparency: Greenpeace commends Kroger for publicly sharing its sustainability goals and providing detailed updates online. Kroger also provides significant transparency online for its private label product standards, including the audit questions it asks its suppliers.92 While Kroger has in-store promotion of its sustainability goals, it must do more to provide product traceability information to customers in a manner that is accessible in the store. As the retailer pivots more to online sales, traceability information must likewise be embedded with seafood product listings online.

Inventory: While Kroger improved in this category, its failure to discontinue red list species is disastrous for our oceans. Kroger sells orange roughy, bigeye tuna, and Chilean sea bass—three species that should not be sold by any retailer committed to seafood sustainability. While the retailer carries some sustainably caught or farmed species, it is unclear what percentage is from better sources (e.g., shrimp and salmon, and albacore, skipjack, and yellowfin tuna). Greenpeace reported in its 2017 Tuna Shopping Guide93 that Kroger was developing a private label pole and line tuna product; however, more than one year later it is unclear if this product will ever launch.

### **#12 SUPERVALU**





Headquarters: Eden Prairie, MN

Stores and Banners: 114 stores operating as Cub Foods, Shoppers Food & Pharmacy, Hornbacher's, and Rainbow<sup>94</sup>

Background: Shortly before publication of this report, United Natural Foods agreed to acquire SUPERVALU with the intent to divest from its retail operations. SUPERVALU's FY 2017 revenue was approximately \$15.9 billion.

Greenpeace **Comments:** Greenpeace encourages United Natural Foods and SUPERVALU leadership to heed the following recommendations, and looks forward to a productive dialogue with United Natural Foods on seafood sustainability, ocean health, and seafood workers' rights.

SUPERVALU's inventory largely demonstrates compliance with its moderately robust seafood policy. The company can most improve in the initiatives and transparency categories. SUPERVALU needs to swiftly address the following: shelf-stable tuna, social responsibility, and more transparent communication of traceability to its customers. And while this assessment evaluates only SUPERVALU's retail operations, as the company transitions to wholesale distribution. it has a growing opportunity to ensure more sustainable seafood is available among independent grocers, as well as tackle its single-use plastic footprint.

Sustainable Seafood Policy: SUPERVALU partnered with WWF to develop and implement its sustainable seafood policy. SUPERVALU requires wild-caught seafood to be sourced from fisheries that are MSC certified, in full assessment, or in a comprehensive FIP. For farmed seafood, it requires that its vendors achieve BAP 2-star or higher (or equivalent) certification, and is urging them to achieve BAP 4-star certification as quickly as possible. While Greenpeace always encourages strengthened supplier standards, SUPERVALU must also consider the shortcomings of eco-certifications, which cannot guarantee fully sustainable, ethical seafood (see pages 7-8). The company's shelf-stable tuna policy has a low bar of merely requiring that the suppliers be members of ISSF. SUPERVALU appears opposed to GE salmon and seafood; it should make this standard part of its policy, rather than outsource its commitment to various certification schemes.

Seafood Sustainability Initiatives: SUPERVALU relies on WWF to review its supply chain for compliance with its sustainability policy. Rather than having official policies on IUU fishing or transshipment at sea, the retailer only relies on ISSF standards, which alone, will not guarantee sustainable, ethical seafood (see page 9). Fortunately, SUPERVALU is developing a social code of conduct this year. While SUPERVALU would investigate any labor abuse allegations and stop relying on a supplier if these abuses were confirmed, like all profiled retailers, it should use its buying power to constructively improve a supplier's operations before terminating the relationship. SUPERVALU signed the 2018 tuna RFMO letter, sent a letter to the Indonesian Ministry of Maritime Affairs and Fisheries regarding sustainable tuna management, and sent letters supporting management of its FIPs.

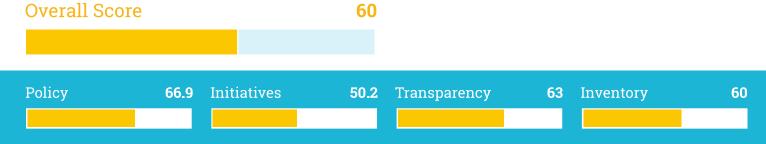
Many SUPERVALU retail stores have converted their deli hot-food containers from Styrofoam to post-consumer recyclable packaging. However, the company needs to release a comprehensive, public policy to phase out single-use plastics.

Labeling and Transparency: SUPERVALU needs to improve its communication of traceability and sustainability information to its customers. While the company features a paragraph on its website, it does not contain enough information on traceability, nor does it do a sufficient job in communicating this information at the point of sale. The exception is that SUPERVALU features a QR code on its private label canned tuna (Essential Everyday and sustainable pole and line Wild Harvest brands) that provides some sourcing information.

Inventory: SUPERVALU performed better than many of its peers in this category. Greenpeace commends SUPERVALU for refusing to carry Chilean sea bass and orange roughy. The company has made welcomed improvements toward more selective gear types for tuna (e.g., one-by-one albacore and yellowfin tuna); however, it needs to improve its shelf-stable skipjack tuna procurement. SUPERVALU must also immediately address its poor sourcing of Atlantic halibut, pangasius, and farmed shrimp.

### #13 Walmart





Headquarters: Bentonville, AR

Stores and Banners: 5,834 stores operating as Walmart, Walmart Supercenter, Neighborhood Market, and Sam's Club

Background: Walmart continues to grow, and remains the largest U.S. retailer, although it is facing competition from Amazon. Walmart purchased Jet.com, began online grocery delivery for Sam's Club with Instacart, and has tested online grocery delivery for Walmart stores. Its FY 2017 revenue was approximately \$266.2 billion.

Greenpeace Comments: Walmart's score increased in this year's assessment, though it dropped in the rankings as other retailers made stronger improvements. Following a Greenpeace campaign to improve Walmart's shelf-stable tuna, the retailer responded with a tepid version of a sustainable shelf-stable tuna policy that has goals as far out as 2025.95 Rooted in ISSF standards, this policy will not result in the kind of sustainability and social responsibility that other retailers like Whole Foods deliver today on shelf-stable tuna. xxi Walmart is making progress on its wild and farmed seafood sourcing goals and is exploring what could be transformative traceability solutions with blockchain. Unfortunately, Walmart is failing to tackle the plastics crisis and, as the world's largest retailer, must urgently improve.

Sustainable Seafood Policy: This year, Walmart has achieved compliance with its stated sustainability policy for fresh and frozen seafood; however, it has until 2025 to comply with its lackluster shelf-stable tuna policy. Its wild-caught fresh/frozen seafood policy requires MSC (or GSSI equivalent) certification, or sourcing from a FIP. At the moment, 76% of all private label and national brand seafood sold by Walmart is certified, with the remainder in a FIP. Moreover, 98% of all private label and national brand farmed products are either BAP or ASC certified, with less than 2% in AIPs. While it is encouraging that Walmart is hitting its stated goals on these policies, eco-certification schemes still have a host of problems (see page 8), which Walmart does not seem to address. Its shelf-stable tuna policy is weak, 96 as the retailer does not have robust supplier standards that would ensure responsibly caught tuna.

Seafood Sustainability Initiatives: Greenpeace commends Walmart for signing the 2018 tuna RFMO letter in support of better fisheries management, which is meaningful given Walmart's size and influence

in global supply chains. Walmart works with various auditing firms to assess social compliance and participates in industry initiatives like the Seafood Task Force. However, participation in industry initiatives at their current, low level of ambition will not result in systemic changes in an industry fraught with labor and human rights violations. Walmart must support legally binding agreements for seafood workers' rights (see pages 7-8) and must comprehensively address IUU fishing and transshipment at sea in its tuna policy, which it fails to do by relying on ISSF standards (see page 9).

Walmart must take leadership to address the plastic pollution crisis and strengthen its goals, which are mainly focused on recycling.xxii By prioritizing recyclable single-use packaging rather than phasing out plastics altogether, Walmart is shifting the burden to consumers, which is an outdated, ineffective strategy that will not stop the flow of plastics into our oceans (see page 12).

**Labeling and Transparency: Walmart** is one of three U.S. retailers publicly sharing sourcing information for its wild-caught seafood via ODP. Greenpeace commends Walmart for modeling transparency; however, because retailers may choose which data to provide via ODP, this picture is incomplete (e.g., skipjack tuna is not listed). Walmart should take this opportunity to voluntarily disclose all of its seafood sourcing information, including its wild-caught and farmed data for its fresh, frozen, and shelf-stable categories. Walmart is investing in blockchain for traceability solutions, which could help create standards for other retailers to follow. Greenpeace encourages Walmart to share publicly if and how it will use this technology in its seafood supply chains. Walmart has substantial information online about its policies, including some information on social responsibility, and provides some signage for customers in stores as well, although it could markedly improve in this area.

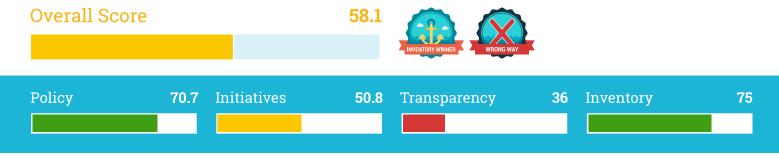
Inventory: Fortunately, Walmart does not sell red list species like orange roughy and Chilean sea bass. It needs to improve its sourcing of swordfish, and must immediately address its tuna procurement, as only a small portion of its tuna is sourced sustainably. Walmart needs to further improve sourcing of its salmon and shrimp, two important species by volume. Given the retailer's size, any modest improvements would benefit the sustainability of global seafood supply chains.

xii Walmart's shelf-stable tuna policy can be met by myriad options, which inherently creates loopholes for the retailer to avoid sourcing from more sustainable options. Moreover, the policy starts with a disclaimer that this is all subject to "price, availability, quality, customer demand, and unique regulatory environments across our global retail markets[.]" Additionally, its reliance on ISSF standards will not ensure sustainable, ethical tuna procurement (see page 9). Walmart's shelf-stable tuna policy is in need of true reform.

<sup>🔤</sup> Goals like 100% recycled material for private label brand packaging by 2025 will help, but are far too weak given the scope of the problem and Walmart's behemoth single-use plastic

### #14 Trader Joe's

### TRADER JOE'S



Headquarters: Monrovia, CA

Stores and Banners: 480 stores operating as Trader Joe's

Background: Trader Joe's is a nationwide chain known for its unique private label products. Its FY 2017 revenue was approximately \$13.6

**Greenpeace Comments:** After making significant improvements earlier in the decade, Trader Joe's continues its recent trend of underperforming in this assessment. Some reasons for this disappointing decline from leading retailer to mediocre performer include Trader Joe's inability to follow through on some of its more ambitious sustainability goalsxxiii and its lack of transparency with its customers and for this assessment. Questions remain about the sustainability of some species (e.g., farmed salmon, shrimp) and, in the absence of a formal, public seafood policy that is the norm among retailers in 2018, what standards Trader Joe's has to ensure responsible seafood procurement. Given its limited seafood inventory compared with more conventional retailers, Trader Joe's was the category winner for inventory; however, it will continue to lag behind without marked improvements on its policy, advocacy initiatives, and transparency.

Sustainable Seafood Policy: Trader Joe's has publicly committed to prohibit GE seafood in its stores. Trader Joe's prides itself on not paying "third-party entities to provide us with a sticker that we can put on our labels"; instead the retailer claims to hold itself and its vendors accountable for responsible seafood procurement.<sup>97</sup> It is not entirely clear what this means. Greenpeace does not fault Trader Joe's for avoiding third-party certifications, because several are fraught with problems of their own. (Other retailers should take note and reconsider their unquestioned allegiance to third-party certifications.) However, Trader Joe's could markedly improve the clarity of its policy and standards online. In a years-old statement,98 the retailer simply notes that all of its seafood comes from sustainable sources, and that it references Seafood Watch for sourcing decisions. While Greenpeace commends Trader Joe's for its work to discontinue unsustainable species in alignment with this public statement, more than five years later, it is time for Trader Joe's to release a formal public policy.

**Seafood Sustainability Initiatives:** As stated on its website, Trader Joe's conducts internal and external audits of its suppliers' facilities. 99 While the retailer did not provide hard evidence, it most likely has a better handle on its supply chain than its competitors, given its

smaller inventory and vertically integrated supply chain. Trader Joe's does not have a policy regarding transshipment at sea for tuna, which it should pursue, given that its sourcing of longline caught albacore exposes its supply chain to risks of IUU fishing and labor and human rights abuses (see page 9). Greenpeace encourages Trader Joe's to publish online its social responsibility code of conduct, strengthen it with input from labor and human rights organizations, and take proactive steps to monitor compliance.

Last year, after a campaign led by dozens of conservation NGOs, Trader Joe's committed to stop buying Mexican shrimp, 100 which is harvested by gillnets that entangle and kill the endangered vaquita. This year, Trader Joe's parent company, ALDI Nord, signed the 2018 tuna RFMO letter. Both are encouraging developments; however, it remains unclear if Trader Joe's has a strategy to proactively advocate for ocean health and human rights.

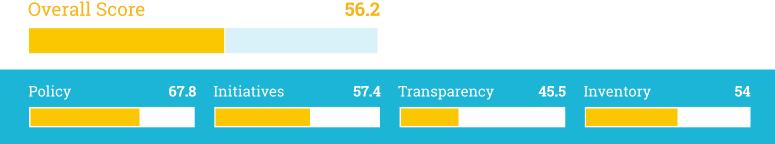
Greenpeace commends Trader Joe's for phasing out polystyrene. However, given the copious amount of single-use plastics wrapped around Trader Joe's products, the retailer must announce strong public commitments and a policy to phase out single-use plastics.

Labeling and Transparency: Trader Joe's failed this category. It has limited sustainability information at the point of sale, aside from more sustainable gear types (e.g., pole and line) on some of its canned tuna products. Aside from industry and marketing groups, the retailer does not appear to actively work with seafood scientists or NGOs. Trader Joe's must be more transparent with the public about its sourcing policies and initiatives, and engage labor and sustainability experts to improve its operations.

Inventory: Trader Joe's earned a category winner badge for its inventory, largely because it carries far fewer species than more conventional retailers. Greenpeace commends Trader Joe's for dropping several red list species years before other retailers—it does not sell orange roughy, Chilean sea bass, bigeye tuna, or shark. However, questions remain regarding the sustainability of its farmed salmon and shrimp sourcing, whether its swordfish is responsibly sourced, and whether it will convert its longline canned albacore to pole and line, following retailers like Whole Foods, Hy-Vee, and Meijer.

xiiii Trader Joe's still lacks a robust, public sustainable seafood policy and carries some species that may not be as sustainably sourced as other available options. Without additional transparency, it is hard to know. These are similar concerns that Greenpeace noted years ago.





Headquarters: Issaquah, WA

Stores and Banners: 611 stores operating as Costco

Background: Costco is the third largest U.S. retailer (by revenue), and the largest membership warehouse club in the country. As Costco's sales continue to increase and it aggressively competes with rival Amazon, it is pushing suppliers to lower prices and is growing its private label brand to offer products that can be found only at Costco. Its FY 2017 revenue (for consumables) was \$66.1 billion.

**Greenpeace Comments:** While Costco's score improved slightly this year, its ranking remained stale as other retailers climbed higher. The retailer has made big changes over the years, from discontinuing several red list species to improving its aquaculture standards and calling for stronger fisheries management. Costco has an opportunity and responsibility to set the bar for initiatives from tackling plastic pollution to confronting human rights abuses in seafood supply chains. As competition intensifies with Amazon, Walmart, Kroger, and others, Costco must leverage its popular brand and purchasing power for healthy oceans and workers' rights, creating additional incentives for its competitors to follow suit.

Sustainable Seafood Policy: Costco's seafood policy is available online and describes the retailer's core principles and strategies. Greenpeace commends Costco for providing this information and including links to its various initiatives for customers who want to learn more about its sustainable seafood program. Costco has publicly committed to not sell GE salmon, which is reassuring because it sells enormous amounts of farmed salmon every week.<sup>101</sup> And while Costco relies on ASC standards for species like salmon, concerns with eco-certifications continue (see page 8). Greenpeace urges Costco to strengthen its policy to go beyond MSC and ASC standards, and for its tuna policy to go beyond ISSF standards, which do not sufficiently address issues like transshipment at sea with longline vessels (see page 9). Costco also has social standards and has adopted the Seafood Task Force code of conduct.

Seafood Sustainability Initiatives: Costco is a founding member of the Seafood Task Force. Greenpeace commends Costco for its efforts, and urges the retailer to use its influence to ensure the Task Force raises its ambition to produce results (e.g., publicly call on the

Thai government to legalize unions and adopt key ILO conventions (see pages 7–8)). Additionally, Costco should rally Seafood Task Force members to support legally binding agreements for workers' rights. Costco is among dozens of retailers that signed the 2018 tuna RFMO letter calling for improved fisheries management.

Costco is developing a plastics packaging policy, which, if strong enough, will present an opportunity for one of the nation's largest retailers to announce sweeping commitments that set the bar for other U.S. retailers. This would be big news, given the public's interest and desire to see businesses and government act on plastic pollution.

Labeling and Transparency: Costco can most improve in this category. Its minimalist approach with store layouts and packaging makes it difficult for customers to know which products are truly sustainable. Online, Costco has invested in a traceability website for its Kirkland Signature albacore, 102 which is a great way to communicate additional information about products to customers. However, as younger generations seek companies to patronize that uphold strong ethics, Costco needs to better communicate its initiatives to the public.

Inventory: Greenpeace applauded Costco for discontinuing red list species like orange roughy and Chilean sea bass in 2011. Unfortunately, both species now have some MSC certified sourcing, which means that some retailers have begun to sell them once again. Costco now sells Chilean sea bass, which is a long-lived, slow-growing species that should not be commercially available. Greenpeace urges Costco to reinstate its 2011 ban on Chilean sea bass. In 2014, Costco made waves when it launched its FAD-free Kirkland Signature skipjack tuna product.<sup>103</sup> Unfortunately, it has since been discontinued, leaving Costco without a single sustainable private label canned tuna product. It remains unclear if Costco will improve its shelf-stable tuna for both its private label and national brand products in stores.

### #16 Southeastern Grocers

**Overall Score** 





Policy 61.7 **Initiatives** 47.6 Transparency Inventory 57

Headquarters: Jacksonville, FL

Stores and Banners: 575 stores operating as Bi-Lo, Harveys Supermarket, Winn-Dixie, and Fresco y Más

Background: As its name implies, Southeastern Grocers is regionally located in the U.S. Southeast. The retailer made headlines this year after filing for bankruptcy. As of late May, it had successfully completed its financial restructure, which included several store closures. Its FY 2017 sales were \$9.9 billion.

**Greenpeace Comments:** Despite its financial woes, Southeastern Grocers' momentum on sustainable seafood appears to have continued, which is a testament to recent years of leadership and collaboration from its seafood team. In yet another Carting Away the Oceans first, Southeastern Grocers received a passing score, 104 continuing to climb the ranks after being the most improved retailer in the last assessment. While it still requires significant work to provide its customers with responsibly sourced seafood, Southeastern Grocers is on the right track and must continue this work to promote healthy oceans and support workers' rights.

Sustainable Seafood Policy: Southeastern Grocers has a public policy that covers its fresh and frozen farmed seafood, with a goal of 100% BAP 4-star procurement by the end of 2018. It is working to incorporate wild-caught and shelf-stable seafood into its policy, which will help ensure improvements in categories like shelf-stable tuna. Especially given its focus on farmed seafood in its policy, Southeastern Grocers should swiftly incorporate a ban on any GE seafood, including GE salmon. While Southeastern Grocers has a code of conduct for its suppliers, given ongoing labor and human rights abuses in the seafood industry, this is an important moment for Southeastern Grocers to strengthen and publicly share its social standards.

Seafood Sustainability Initiatives: Southeastern Grocers was the first U.S. retailer to become a member of the International Pole & Line Foundation (IPNLF). Through this work, the retailer has launched a

private label canned pole and line albacore tuna product. To continue its sustainable tuna advocacy, Southeastern Grocers should join a growing list of businesses and NGOs calling on tuna RFMOs to better manage tuna fisheries. 105 The retailer also participates in a variety of FIPs, which reflects its partnership with SFP, and references IUU vessel lists to help prevent IUU seafood from entering its supply chains. Southeastern Grocers can strengthen its sourcing by addressing problems associated with transshipment at sea (see page 9) and, more broadly, by supporting legally binding agreements for seafood workers' rights (see pages 7–8).

Aside from encouraging recycling and providing customers with the option of reusable or paper bags, it is unclear if Southeastern Grocers will help tackle the plastic pollution crisis by phasing out single-use plastics in its operations.

Labeling and Transparency: Southeastern Grocers now has its seafood policy online and continues to promote its certified products to its customers. It publicly promoted joining IPNLF and launching its pole and line albacore product, citing the need for sustainable tuna fisheries.<sup>106</sup> Through its work with SFP, Southeastern Grocers has increased the amount of data available on its sourcing, which, in theory, could be available to customers upon request. As tools like blockchain become more widespread and customers want to know about the origins of their food, Southeastern Grocers must expand its information available at the point of sale and online so that its customers can make informed decisions.

Inventory: Southeastern Grocers markedly improved in 2015 after swiftly discontinuing orange roughy, shark, and monkfish for sustainability reasons. Greenpeace commends Southeastern Grocers for not selling these species or bigeye tuna, for discontinuing Atlantic halibut, and for introducing pole and line albacore tuna. The retailer must now ensure that the rest of its private label and national brand shelf-stable tuna is more sustainably sourced. Additionally, Southeastern Grocers should join many of the top-five retailers by immediately discontinuing Chilean sea bass for sustainability reasons, regardless of its MSC certification.

### #17 Publix



**Overall Score** 48.1 DID NOT RESPOND



Headquarters: Lakeland, FL

Stores and Banners: 1,164 stores operating as Publix, Publix Sabor, and Publix GreenWise Market

Background: Publix is a large retailer historically known for its strong Florida presence. Publix is continuing its expansion into new markets, including Richmond, VA, where it acquired ten stores following the Ahold Delhaize merger, and is increasing its presence in the Carolinas and Tennessee. Publix's FY 2017 sales were approximately \$34.3

**Greenpeace Comments:** Publix is another in the firsts category for this assessment, finally achieving a passing score a full ten years after Greenpeace began evaluating Publix on seafood sustainability. Much of its improvement is a result of transparency initiatives such as ODP. Publix has a public seafood policy and invests time and resources to improve its sourcing; however, it continues to sell species of concern (e.g., orange roughy, shark, tongol tuna), which it must discontinue immediately. The invitation is still standing for Publix to engage in a productive dialogue with Greenpeace.

Sustainable Seafood Policy: Publix has a public policy and flashy interactive website that features information about its companywide sustainability initiatives, including those focused on seafood. It lays out the retailer's strategy of working toward more responsible seafood procurement, mainly through FIPs and AIPs. For shelf-stable tuna, Publix relies on ISSF standards, which do not ensure that tuna is sustainably caught or that significant labor issues associated with practices like transshipment at sea with longline vessels are addressed (see page 9). While it is encouraging that Publix shares its sustainable seafood approach in a variety of formats online, it does not provide Greenpeace with enough specifics to fully assess the retailer in this category.

Seafood Sustainability Initiatives: Due in part to its partnership with SFP, Publix is a big proponent of FIPs and engages in Gulf of Mexico shrimp and snapper/grouper FIPs. While it is encouraging that Publix and other retailers work to improve fisheries, sometimes it is best to stop sourcing a species when the particular fishery is poorly managed or experiencing overfishing, to allow time for recovery. In a welcome move, Publix signed on to the 2018 tuna RFMO letter, calling for improvements in tuna fisheries management. Publix is a participant in various industry panels and fora, including those focused on labor and human rights. However, it is unclear what Publix's policy and commitments are regarding labor and human rights in the seafood industry.

Publix uses post-consumer recycled content for deli packaging, has various initiatives on bag reduction, and relies on reusable shipping containers for seafood. These initial steps are encouraging, but Publix needs to prioritize launching strong public commitments and a policy to phase out single-use plastics. This should be especially high on Publix's radar, given that most of its stores are near the beautiful Florida coastline, and because of the company's reliance on local seafood sourcing, which, like all marine life, is increasingly threatened as plastics flood into our oceans.

Labeling and Transparency: Publix rose in the rankings largely because of a marked increase in transparency. Publix was the first U.S. retailer to disclose some of its wild sourcing information via ODP. Greenpeace commends Publix on publicly providing this information and encourages it to ensure that all of its wild-caught and farmed seafood sourcing information, including that of national brands, is available online. In addition to the ODP website, Publix has information online and in stores to educate customers, although it could improve in-store access to information so that customers can evaluate whether a species is sustainably sourced.

Inventory: Publix continues to fail the inventory category. Many of the species Publix sells are red listed for good reason (e.g., high levels of bycatch, poor management, habitat destruction). Publix continues to sell orange roughy, shark, tongol tuna, and Chilean sea bass. It must discontinue these species immediately, improve its overall tuna sourcing, and clarify what improvements it has made on its farmed seafood procurement.

#### #18 WinCo







Headquarters: Boise, ID

Stores and Banners: 119 stores operating as WinCo Foods and Waremart by WinCo

**Background:** WinCo Foods is an employee-owned retailer with stores in the U.S. West, Southwest, Oklahoma, and Texas. Its FY 2017 sales were approximately \$7 billion.

Greenpeace Comments: In recent years, WinCo's seafood team has invested time and resources in sustainable seafood, making steady improvements. Especially as WinCo continues to grow, it must use its brand and purchasing power to publicly call for improvements in the seafood industry. Greenpeace urges WinCo to seize this moment for leadership as labor and human rights abuses remain rampant in the seafood industry and the plastic pollution crisis worsens.

Sustainable Seafood Policy: WinCo has a sustainable seafood policy that covers some of its wild and farmed seafood, although it has work to do to ensure that 100% is covered, including shelf-stable seafood. As the retailer considers policy improvements, it should formally incorporate its commitment not to sell GE seafood. Unlike many retailers that source MSC, BAP, and other certified products, WinCo has additional measures in place, from referencing the Seafood Watch recommendations to IUU vessel lists. As part of its seafood program, WinCo must also clarify its policy on labor and human rights. Together, these actions will help strengthen its goal of sourcing responsible seafood, and will also improve its performance in this category.

Seafood Sustainability Initiatives: WinCo responds swiftly to incidents of labor or human rights violations that could be linked to its supply chains, including engaging suppliers regarding its concerns.

In addition to publicly sharing a social code of conduct, Greenpeace encourages WinCo to require action plans that remedy labor abuses if they occur, so that it can leverage its buying power to help make improvements throughout the industry. WinCo must create and implement a strong policy that addresses transshipment at sea in its tuna supply chains, given the practice's association with labor and human rights abuses. With the dire state of the ocean plastics crisis, WinCo must outline its policy and initiatives to tackle plastic pollution, beyond the commonplace initiatives that some retailers espouse (e.g., recycling, reusable bags).

Labeling and Transparency: While WinCo performed poorly in this category, change is coming. The retailer currently has memos posted in stores noting that it sells certified seafood and providing information about its BAP requirements on wet cases. WinCo is working to make its policy available online, will ensure customers can easily access this policy while in stores via QR codes, and will communicate its progress on sourcing improvements. Greenpeace encourages WinCo to also provide information on the various groups it works with, and to ensure it engages a variety of stakeholders from industry to NGOs, scientists, and regulatory bodies.

**Inventory:** This is WinCo's strongest category. The retailer sources BAP 4-star farmed seafood for nearly all fresh and frozen products, and does not sell red list species like Chilean sea bass and bigeye tuna, although it does carry orange roughy in a small percentage of stores. Greenpeace urges WinCo to discontinue orange roughy immediately; to ensure all tuna sold in stores, whether private label or national brands, is sustainable; and to not sell any additional red list species.



**Overall Score** 

46.4



#### DID NOT RESPOND

Policy 59.5 36 **Initiatives** 37.7 Transparency 52.5 Inventory

Headquarters: San Antonio, TX

Stores and Banners: 336 stores operating as H-E-B, H-E-B Plus!, Mi Tienda, Joe V's Smart Shop, and Central Market

Background: H-E-B is a privately held retailer with a large presence throughout Texas. Its FY 2017 sales were approximately \$23.1 billion.

**Greenpeace Comments:** Yet another year goes by and H-E-B refuses Greenpeace's invitation to engage in a dialogue on sustainable seafood. While it posts some promising standards online, H-E-B has made questionable moves since the last assessment, like reintroducing orange roughy. The retailer's score dropped because of a lack of available information on new initiatives and its poor performance in the inventory category. Significant questions remain about its policies on and commitments to labor and human rights and its efforts to phase out single-use plastics.

Sustainable Seafood Policy: When it comes to publicly available policies, H-E-B has a policy that makes clear its core issues in an easily accessible format for the public. 107 The retailer sources some certified seafood, is publicly opposed to GE seafood, and explains when it will not sell seafood because of sustainability concerns. It is unclear, however, whether H-E-B has standards regarding shelf-stable tuna or has a policy regarding labor and human rights.

Seafood Sustainability Initiatives: H-E-B failed this category. While it supports local seafood from the Gulf Wild program and uses Trace Register for traceability (and to avoid IUU seafood), it is largely unclear what new initiatives H-E-B is undertaking, especially regarding labor and human rights abuses in the seafood industry. H-E-B must enact strong standards regarding transshipment at sea to mitigate the risks of IUU fishing and labor and human rights abuses associated with this practice, and must support efforts to create legally binding agreements for workers' rights (see pages 7–8).

H-E-B has invested in some measures to curb plastic pollution. This past Earth Day, it gave away nearly 200,000 reusable bags. However, it is unclear how H-E-B will comprehensively address the plastic pollution crisis and work to phase out single-use plastics in its operations. This should be a major priority for a retailer that prides itself on sourcing from the nearby Gulf of Mexico, which is already threatened by offshore drilling and agricultural runoff.

Labeling and Transparency: Greenpeace commends H-E-B for providing detailed information online, such as species sold and their sustainability status—an initiative that existed well before ODP. While it provides gear type for some species, the retailer should provide it for all species, share its sourcing for all seafood sold across its banners, and provide detailed instructions on how customers can use this list to make informed purchases. H-E-B shares online which species it will not sell and has videos featuring sustainable seafood. Like most retailers, H-E-B could increase its sustainability information at the point of sale. Online, the retailer has ample opportunity to provide details about seafood sustainability in the "product description" area, but it does not do so for most of its seafood products.

Inventory: H-E-B failed this category. Despite some promising standards,<sup>108</sup> H-E-B continues to sell several problematic species. Given the level of concern expressed by multiple NGOs about bigeye and tongol tuna, orange roughy, and Chilean sea bass, it is surprising that H-E-B still carries these species. Despite its MSC certification, orange roughy in particular has been fraught with controversy and concerns from multiple global organizations. 109, 110 Sometimes a species should not be commercially available. If H-E-B were to truly take a precautionary approach, it would swiftly discontinue orange roughy and the aforementioned red list species.

#### #20 Price Chopper

**Overall Score** 40.4







Headquarters: Schenectady, NY

Stores and Banners: 134 operating as Price Chopper, Market 32, and Market Bistro

**Background:** Price Chopper is a privately held regional retailer in the U.S. Northeast. Its FY 2017 sales were \$3.84 billion.

**Greenpeace Comments:** Price Chopper's drop in this year's ranking reflects a need for strengthened policies, advocacy, transparency, and sourcing improvements. Fortunately, it appears that things may soon improve, which is great news for our oceans. The retailer just discontinued monkfish for sustainability reasons and is developing a shelf-stable tuna policy. As Price Chopper invests in its Market 32 brand, it should revamp not only its stores, but also its policies and approach to customers who want responsible seafood.

Sustainable Seafood Policy: Price Chopper's policy covers wild and farmed seafood. The retailer references the Seafood Watch red list and incorporates various certified products from Fair Trade to MSC and BAP. Historically, Price Chopper has opposed GE seafood, but lacks a formal policy. Price Chopper is developing a shelf-stable tuna policy, which should go beyond basic, ISSF-influenced standards that some other retailers rely on, as these standards do not fully account for massive amounts of bycatch or problematic transshipment at sea (see page 9).xxiv As Price Chopper updates its seafood policy, it should also publicly disclose its social standards policy to address rampant labor and human rights abuses in the seafood industry.

Seafood Sustainability Initiatives: Price Chopper failed this category. It is unclear whether Price Chopper is working with conservation NGOs, scientists, and industry to advocate for seafood sustainability. To its credit, the retailer has historically made efforts to mitigate seafood fraud (e.g., DNA testing of its seafood), currently

works with Trace Register, and engages suppliers on safe working conditions and fair wages. However, in a time when even local seafood is apparently not local, it is vital to have a strong chain of custody and measures to ensure legal, sustainable, and ethical seafood. Price Chopper should join calls from labor for legally binding agreements that protect seafood workers' rights (see pages 7–8). Price Chopper must leverage its position in the U.S. market to advocate for reforms, for example, by joining other retailers that are calling for action from tuna RFMOs.<sup>112</sup> It is encouraging that Price Chopper supports plastic bag bans, although to comprehensively tackle plastic pollution, it needs a policy and commitments to phase out single-use plastics.

Labeling and Transparency: Price Chopper performed poorly in this category. The retailer must improve by comprehensively communicating with its customers about sustainable seafood and how to make informed decisions in stores and online. A major first step is reinstating its website on sustainable seafood, which includes its policy. 113 This is an opportunity to incorporate any policy improvements and launch new education initiatives online and at the point of sale.xxv

**Inventory:** Price Chopper references the Seafood Watch recommendations, including its red list. The retailer should be commended for discontinuing monkfish (even though it is yellow rated) because of bycatch and seafloor impacts. Other retailers should follow Price Chopper's lead and seriously consider whether a "better alternative" species should be sold, given outstanding concerns. This level of foresight should help Price Chopper consider other ways to improve its sourcing, from tuna to farmed seafood such as pangasius. And while it may be MSC certified, Chilean sea bass is one whitefish that should never be commercially available. Greenpeace urges Price Chopper to join retailers like Hy-Vee and Save Mart and discontinue Chilean sea bass.

xxiv Greenpeace encourages Price Chopper to reference policies from top-ranked retailers like Whole Foods, Hy-Vee, and ALDI, and seek input from reputable environmental and labor NGOs during policy development.

xxv For examples, see transparency and education initiatives employed by top-ranked retailers such as Whole Foods and Hy-Vee.

### #21 The Save Mart Companies





Headquarters: Modesto, CA

Stores and Banners: 207 stores operating as Save Mart, S-Mart, Lucky, Lucky California, FoodMaxx, and MaxxValue Foods

**Background:** The Save Mart Companies ("Save Mart") operates stores in northern and central California as well as Nevada. Its FY 2017 sales were \$4.1 billion.

**Greenpeace Comments:** Save Mart failed this year's assessment. Nonetheless, the retailer continues to improve and is within reach of a passing score. It performed moderately well in the policy and inventory categories, although it must markedly improve in the initiatives and transparency categories, which would propel it further in the rankings. Greenpeace encourages Save Mart to strengthen its focus on labor and human rights in the seafood industry and to address plastic pollution. As Save Mart continues to implement its sustainable seafood program, all indications suggest this could be the last time it will be in the red.

Sustainable Seafood Policy: Save Mart made significant improvements, releasing a public sustainable seafood policy,114 which is an important first step. Save Mart should strengthen its policy in several areas. For example, while there are some well-managed domestic fisheries, not all fall into this category. Even more alarming, some companies are marketing their products as domestic when they are anything but. 115 Having additional traceability and auditing standards can help improve Save Mart's policy, including more developed standards on labor and human rights. While ISSF is a start for its shelf-stable tuna policy, this approach alone leaves several gaps that will not ensure sustainable, ethical tuna (see page 9). Greenpeace encourages Save Mart to continue improving its policy and standards as a part of its larger strategy to source responsible seafood.

Seafood Sustainability Initiatives: Save Mart failed this category. While the retailer conducts internal audits of its seafood for traceability purposes and consults its suppliers on changes in fisheries management and stock health, Save Mart has work to do to better ensure more responsible operations. Examples include referencing combined IUU vessel lists116 to ensure it is not inadvertently sourcing illegally caught seafood; developing policies and communicating with suppliers Save Mart's position on transshipment at sea; publicly advocating for marine reserves; joining a growing number of businesses and NGOs calling for improved management of tuna fisheries;<sup>117</sup> and making strong, public commitments and policies to phase out single-use plastics. Beyond its suppliers, Save Mart must engage industry, NGOs, scientists, and regulatory bodies to help ensure healthy oceans and safe, equitable working conditions for seafood workers.

Labeling and Transparency: Save Mart failed this category. While Greenpeace commends Save Mart for releasing a public policy, the retailer must now ensure this policy and key data are available to customers online and in stores so that they can make informed purchases regarding responsible seafood. Fortunately, Save Mart should soon have more communications initiatives regarding its seafood program. Save Mart should look to retailers that score high in this category (e.g., Hy-Vee, Whole Foods) for examples of exenstive online and in-store communications strategies.

Inventory: Greenpeace commends Save Mart for working to discontinue both orange roughy and Chilean sea bass, which, given sustainability concerns, should not be commercially available. With this move, Save Mart will join the ranks of leading retailers that have also discontinued these species for sustainability reasons. Save Mart must make improvements in its tuna category and its farmed seafood procurement, from Atlantic salmon to shrimp and pangasius.

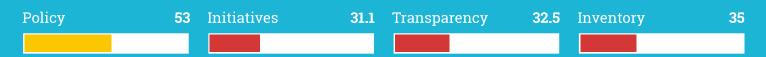
#### #22 Wakefern



**Overall Score** 



#### NOT RESPOND



37.9

Headquarters: Keasbey, NJ

Stores and Banners: 96 stores owned outright under Price Rite and ShopRite banners, as well as supplying hundreds more stores, including additional ShopRite stores, The Fresh Grocer, Dearborn Market, Village Supermarkets, and Inserra Supermarkets

Background: Wakefern is the largest supermarket retailers' cooperative in the country, 118 supplying all Price Rite and ShopRite banners, and owning several stores outright. Its FY 2017 revenue was \$16.3 billion.

**Greenpeace Comments:** Wakefern went from moderate performance in 2015 to the worst-ranked retailer in this year's assessment. While it may be continuing its efforts on sustainable seafood, this is impossible to assess given Wakefern's lack of transparency online, in the press, or via Greenpeace's survey process used for this assessment. However, the company's selection of seafood for sale suggests little has been done. Greenpeace encourages Wakefern to review this report, increase its transparency, and accept Greenpeace's long-standing invitation for a meaningful dialogue on sustainable seafood.

Sustainable Seafood Policy: While Wakefern has a policy, it has very limited information available online, except for the last line in its Q&A section noting its work with MSC and the Global Aquaculture Alliance to source certified seafood. 119 As of 2015, Wakefern did not sell GE seafood, although it remains unclear if the retailer has a companywide policy banning the purchase of GE seafood. It is also unclear how Wakefern ensures its seafood is responsibly sourced, noting the significant gaps in certifications that fail to guarantee seafood is not associated with labor or human rights violations (see pages 7-8).

Seafood Sustainability Initiatives: Beyond sourcing some certified products, very little information is available regarding any Wakefern initiatives to ensure responsible seafood. Greenpeace expects all retailers to leverage their purchasing power, not just to engage suppliers, but to publicly call for sweeping industrywide and regulatory improvements. While Wakefern may be active in some arenas, it needs to better communicate its work. Aside from encouraging its customers to recycle and use reusable bags, it is unclear what policies or commitments Wakefern has to tackle plastic pollution.

Labeling and Transparency: After a solid start in 2014 with press about its sustainable seafood program<sup>120</sup> and some 2016 stories about BAP 4-star shrimp products, 121 there has been limited press about Wakefern's initiatives. Ironically, the most recent press for a Wakefern banner in May has this headline: "ShopRite is making it easier to eat more fish."122 Rather than eating more fish, Greenpeace encourages Wakefern's topline message to be about how it is working to responsibly source seafood and what tools customers can use, beyond flawed certifications, to ensure they purchase sustainable, ethical seafood. As long as any retailer profits from seafood, it must be a top advocate for ocean health and seafood workers. This means being significantly more transparent with customers, NGOs, and the public.

Inventory: Wakefern should discontinue Chilean sea bass, clean up its tuna sourcing, and ensure it does not make the mistake of some other retailers by selling orange roughy simply because it is MSC certified.

# Glossary

AIP: Aquaculture improvement project

Aquaculture Stewardship Council (ASC): A certification scheme for farmed species. ASC certified products are supposed to meet certain criteria for responsibly farmed seafood. While it may be a start, it is best for companies to avoid exclusively relying on third-party certifiers.

Best Aquaculture Practices (BAP): These thirdparty standards seek to address environmental and social responsibility, animal welfare, food safety, and traceability in a voluntary certification program for aquaculture facilities. BAP primarily covers shrimp, salmon, tilapia, pangasius, channel catfish, and mussels. Companies sometimes source BAP certified products according to a coding system (e.g., BAP 2-star, BAP 3-star). While it may be a start, it is best for companies to avoid exclusively relying on third-party certifiers.

**Bycatch:** Marine life unintentionally caught and often killed when fishing, like sharks, turtles, seabirds, and juvenile fish. Wasteful fishing practices from bottom trawls to longlines are highly destructive for marine life and habitats, and supermarkets should sell only the most sustainably harvested seafood available, otherwise refuse to sell it.

**FAD-free:** Fishing without the use of FADs, or setting purse seine nets on free schools of tuna. Other marine life is less impacted when fishing free school, so it is a better option.

FCF: Fong Chun Formosa Fishery Company

**FIP:** Fishery improvement project

**Fish aggregating device (FAD):** An artificial, floating object that attracts schools of tuna, along with the (indiscriminate) aggregation of all kinds of marine life. Fishing with FADs leads to unintended collateral damage, or bycatch, in the form of dead sea turtles, sharks, and other fish.<sup>123</sup>

**Food and Agriculture Organization of the United Nations (FAO):** Among other fisheries-related initiatives, this entity has categorized the oceans' "major fishing areas" by a numeric code. This information helps people to identify where a particular species was caught.

FRN: Fishers' Rights Network

**GE:** Genetically engineered, specifically with regard to salmon. Often used interchangeably with GMO (genetically modified organism) salmon.

**Gear type:** The fishing method used to catch a particular species of fish. Some gear types (like pole and line for tuna) are far more favorable to the environment than others (like trawling for flatfish, which scrapes and damages the ocean floor).

**GSSI:** Global Sustainable Seafood Initiative

**ILO:** United Nations International Labour Organization

**ILO Core Conventions:** Eight conventions that the International Labour Organization deems as fundamental principles and rights at work. Retailers should only source from vessels, companies, canneries, and processors that operate in full compliance with international labor standards, including ILO Core Conventions, the ILO Maritime Labour Convention, and the ILO Work in Fishing Convention.

**ILRF:** International Labor Rights Forum

**IPNLF:** International Pole & Line Foundation

**ISSF:** International Seafood Sustainability Foundation

**IUU:** Illegal, unreported, and unregulated fishing (also known as pirate fishing)

**Longline:** Fishing lines, sometimes dozens of miles long, baited with thousands of hooks. This is a very indiscriminate, highly destructive fishing gear.<sup>124</sup>

Marine Stewardship Council (MSC): Nonprofit organization that runs a certification scheme for wild fisheries. MSC certified products are supposed to meet certain sustainability criteria. In some cases, this certification is not the best barometer for whether a wild-caught species was truly caught sustainably. While it may be a start, it is best for retailers to avoid exclusively relying on third-party certifiers.

NGO: Non-governmental organization

**ODP:** Ocean Disclosure Project

One-by-one: Refers to a series of highly selective gear types for tuna fishing (e.g., pole and line, troll, handline) that have virtually no bycatch. 125

Pole and line: A highly selective form of fishing that has virtually no bycatch, as tuna are caught one-by-one with a fishing pole and a line. See the definition for one-byone.

**QR:** Quick response

Red list: A list of species of seafood that should not be bought or sold for various sustainability reasons, ranging from stock status to farming conditions, to method of capture. Any red list species in this report is classified as "avoid" according to Seafood Watch recommendations. Seafood Watch does not assess some species and/or defers to eco-certifications. Because of existing concerns with eco-certifications (see page 8), for this report, Greenpeace considers any species not evaluated by Seafood Watch as a red list species.

#### **Regional Fishery Management Organization (RFMO):**

An "international body of countries sharing a practical and/or financial interest in managing and conserving fish stocks in a particular region."126 There are about 17 RFMOs covering large areas of our oceans. RFMOs are established by international agreements or treaties and can take different forms. RFMO decisions are binding for member countries.

Responsible seafood: Sustainable, ethical seafood

Responsible tuna: Sustainable, ethical tuna

Seafood Task Force: Formerly known as the Shrimp Sustainable Supply Chain Task Force, this multistakeholder body aims to confront forced labor, human trafficking, and unsustainable fishing in the Thai seafood industry.

Seafood Watch: A part of Monterey Bay Aquarium, Seafood Watch educates consumers and businesses through its sustainable seafood recommendations (e.g., Best Choices, Good Alternatives, or Avoid). Greenpeace used Seafood Watch recommendations to evaluate retailers for the inventory category of this assessment; see the definition above for red list.

**SFP:** Sustainable Fisheries Partnership

Species name: Also known as the Latin name or scientific name, the species name clarifies precisely what species is in the package. Given that mislabeled seafood is a common problem in the industry and many species of fish are known by several names, retailers are encouraged to provide this information at the point of sale.

Sustainable, ethical seafood: Wild-caught or farmraised seafood using best available fishing/farming practices that mitigate adverse environmental and social impacts. This includes sourcing from healthy stocks, using harvest methods that limit environmental impacts, and sourcing from suppliers that treat workers ethically (e.g., in accordance with ILO Core Conventions, the ILO Maritime Labour Convention, and the ILO Work in Fishing Convention).

Sustainable, ethical tuna: Tuna sourced from healthy stocks; caught using sustainable fishing methods, such as pole and line, handline, troll-caught, or purse seine fishing on free schools (i.e., FAD-free); and supplied by workers who are treated ethically (e.g., in accordance with ILO Core Conventions, the ILO Maritime Labour Convention, and the ILO Work in Fishing Convention).

Third-party audit: An audit conducted by an independent party, unaffiliated with either the company or the certifying group, checking whether the product or process meets the standard holder's standards. While an extremely valuable tool, a third-party auditor's performance is only as good as the standards, which serve as the baseline for the audit.

Transshipment at sea: A legal practice wherein one vessel transfers its cargo from its hold to that of another vessel directly next to it, without needing to go to port. This practice is often how unethical companies can commingle legally caught and illegally caught seafood and essentially "launder" pirated seafood as well as hide labor abuse (see page 9).

**UN:** United Nations

**WWF:** World Wildlife Fund



## Endnotes

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