

CARTING AWAY THE OCEANS VIII

2014 Rankings of Seafood Sustainability in U.S. Supermarkets

GREENPEACE

Acknowledgements

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Greenpeace is the leading 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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TABLE OF CONTENTS

Carting Away The Oceans VIII

At a Glance

pg. 4

Words Of Encouragement to Current Industry Leaders

pg. 5

Scoring Criteria For Evaluating Seafood Sustainability

pg. 6-7

2014 Seafood Retail Scorecard

pg. 8-9

Using The Power Of The Market To Clean Up Fisheries

pg. 10

GMO Salmon: The Fish Retailers Don't Want to Touch

pg. 11

Canned Tuna

pg. 12-13

Protecting The Bering Sea Canyons

pg. 14-15

Human Rights Abuses In The Seafood Supply Chain

pg. 16

Retailer Profiles

pg. 17-45

This is the eighth version of the *Carting Away the Oceans* report and the good news is that more grocery stores than ever are developing more robust sustainable seafood policies, engaging in proactive sustainable seafood initiatives, and offering more sustainable seafood options to consumers. In evaluating the performance of 26 major retailers, Greenpeace found that seafood teams in the top performing supermarkets have long since begun leading the way towards a solution instead of simply ignoring the problem. While the same cannot be said for all of the companies profiled in this report, as a whole, there is progress.

The most significant trends and findings from this report are:

- Wegmans has become the fourth grocery store to earn the “good” rating since Greenpeace began its industry rankings in 2008.
- Newly-profiled Hy-Vee has entered the rankings in fifth place, an impressive performance for a first-time assessment.
- Of the top five performing supermarkets on sustainable seafood, four have launched or will shortly launch private label sustainable canned tuna products (pole-and-line or FAD-free). Consumers can now find sustainable and affordable tuna at Whole Foods, Safeway, Trader Joe’s, Hy-Vee, and Walmart.
- Kroger continues to sell the largest number of Red List species (which should not be sold due to environmental reasons)—setting a poor example for the industry.
- Recent and upcoming industry buyouts could radically shake-up retailers’ sustainability performance:
 - » Grocery giant Kroger (ranked 21st) acquired Harris Teeter (ranked 6th) in late January 2014, which could be a loss for our oceans if Kroger replaces Harris Teeter’s seafood sourcing policy with its own. (In this report, Harris Teeter is profiled as a standalone store given its independent status for most of the preceding 12-month period.)
 - » SUPERVALU sold off a large quantity of its banners, including Albertson’s, which is now a sizeable entity in its own right (both are profiled separately in this report).
 - » The recent Safeway/Albertsons merger could spell problems for the oceans if 20th ranked Albertsons’ seafood policies and practices were to apply to 2nd ranked Safeway.
- Ahold USA and Hy-Vee have joined the growing chorus of retailers calling for protection of part of the Bering Sea Canyons in Alaska—key fisheries with futures threatened by industrial fishing.
- Five new grocers are profiled in this year’s report: Wakefern (ShopRite & PriceRite), Hy-Vee, WinCo, Save Mart, and Roundy’s. Consumers that shop at these stores will for the first time see how well they perform in the arena of sustainable seafood.

Despite progress made by the retail sector overall, our oceans continue to suffer from overfishing, destructive fishing, and illegal fishing. Populations of the ocean’s top predators like sharks, tuna, and swordfish have dropped by as much as 90% over the past half-century. Bycatch—where unintended victims like sharks and turtles are caught in the process of fishing, then thrown back into the sea dead or dying—remains a scandalous problem. Wastefully tossing such large amounts of fresh seafood overboard threatens marine ecosystems as well as global food security. Finally, vessels continue to fish illegally in developing countries’ poorly patrolled waters, stealing their resources, livelihoods and traditional sources of food. To worsen matters, shocking human rights violations are often interlinked with this kind of illegal fishing as well. In short, there is still a long way to go to improve the sustainability of seafood sold in the U.S. and around the world.

Transparency is a critical part of measuring and improving sustainability. Greenpeace thanks the retailers that have participated in the survey process and openly shared relevant information about internal sourcing.

Finally, while this report focuses on large-scale chain supermarkets, Greenpeace recognizes and applauds the pioneering role that small chains, independent shops, and local co-ops serve in providing some of the most sustainable seafood available to their local communities.

As a quick tip to any seafood shoppers consulting this guide: please make sure to consider checking out which other grocery store chains are associated with your local store. Sometimes your neighborhood store is owned by a larger, less-recognized corporation. For your reference, we have included these names in the retailer profile section.

The eighth *Carting Away the Oceans* report marks an important chapter in the overall progress of the U.S. retail industry. Below are the top five grocery stores that lead in seafood sustainability for 2014. Four of the five have performed well enough to surpass the 7.0/10 mark and earn a green rating.

1. Whole Foods has maintained its lead this year, claiming both the highest overall score and the strongest sustainable seafood policy. It introduced two additional pole-and-line canned tuna products for both skipjack and albacore, complete with an array of traceability information for these new products. Unfortunately, the company reintroduced a few Red List species. Coupled with Safeway’s improvement, this has narrowed its lead to mere fractions of a point. Nevertheless, Whole Foods deserves its spot at the top of the charts, and should be congratulated for yet another impressive performance.

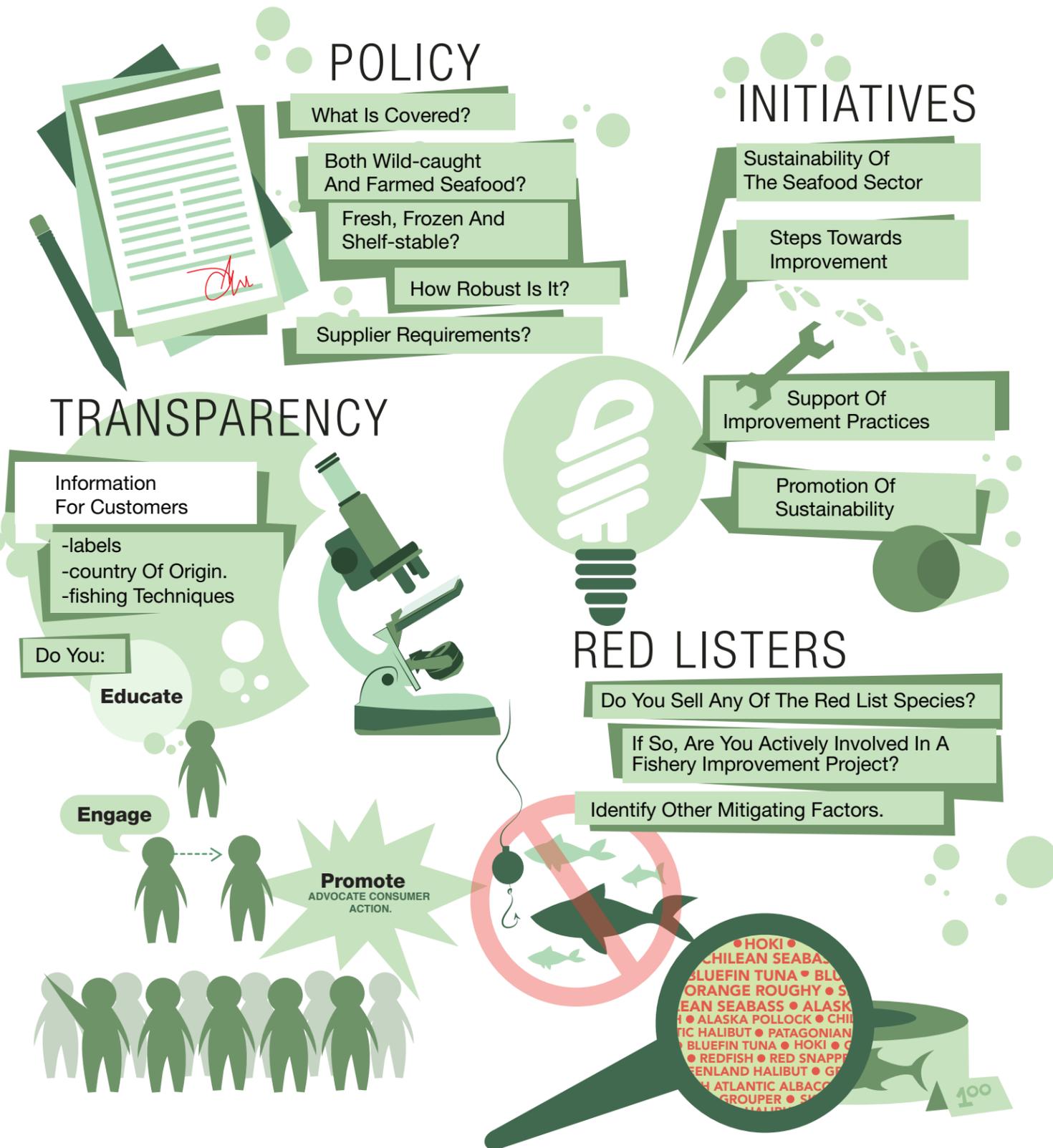
2. Safeway closed the gap between itself and the leader by improving in a number of areas. It doubled down on its commitment to the protection of the Bering Sea Canyons despite industry interference, demonstrating itself as an emerging champion in this area. It is also introducing a new ocean-safe longline-caught albacore product that will supplement its FAD-free, responsibly-caught canned skipjack tuna. Internally, it effectively tracks overall tonnage of Red List species that it phases out over time. However, Safeway should emulate Whole Foods and Trader Joe’s by cleaning up the rest of its shelf-stable offering, and removing destructively-caught tuna brands from its inventory. Given current momentum, in the next 12 months Safeway could easily reclaim the 2012 lead that it had over Whole Foods, with one significant potential hurdle to overcome: the purchase of Safeway by the parent company of Albertsons could spell disaster for seafood sustainability if this results in corporate interference with Safeway’s progress.

3. Wegmans deserves praise for crossing the 7.0/10 mark into the “green” category of retailers and snatching third place from Trader Joe’s. It boasted the best score for the initiatives section, demonstrating no shortage of enthusiasm for tackling important oceans issues by communicating directly with policy and regulatory decision-makers. It is the only retailer so far to confirm with Greenpeace that its private-label pollock is sourced outside of the Bering Sea Canyons, though other retailers are having these conversations now with their suppliers. Wegmans does carry some third party sustainable tuna products but could clean up that section and consider introducing its own private-label brand sustainable tuna, which has already been accomplished by every other retailer in the top five. It made many rapid changes in its Red List inventory over the past year, from dropping species to sourcing them through less destructive methods. Unfortunately, there is still much more to be done in this section, such as dropping Atlantic halibut and Chilean sea bass.

4. Trader Joe’s maintained its green rating. While it was surpassed by Wegmans, the company deserves credit for having introduced a private-label pole-and-line skipjack tuna at one of the most attractive price points of any retailer so far. It also maintains the honorable distinction of selling the least number of Red List species out of any retailer profiled in this report. However, Trader Joe’s actually went the wrong direction in the Red List category over the course of last year. If the retailer focuses its energy more on transparency (which is a near-failing score), it could see itself rapidly climbing the charts like it did last year.

5. Hy-Vee is one of the five newly-profiled retailers in the report, and has surprised many with its impressive baseline score that landed it in the top five retailers profiled. It is introducing two pole-and-line sustainable tuna canned tuna products—one for skipjack and one for albacore. Its energy to take the initiative is felt throughout the industry, from its employee training programs, to its call to protect the Bering Sea Canyons, to its leadership in industry-led councils to improve sustainability. If it hopes to enter the “green” category of its peers above and hit its internal 2015 deadline on full sustainability and traceability, it will need to improve its performance in the Red List and transparency categories, respectively.

SCORING CRITERIA FOR EVALUATING SEAFOOD SUSTAINABILITY



SCORING CRITERIA FOR EVALUATING SEAFOOD SUSTAINABILITY

This report evaluates major U.S. retailers for the sustainability of their seafood, in four key areas: policy, initiatives, labeling and transparency, and Red List inventory.

1. Policy

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

2. Initiatives

The initiatives score is an appraisal of the company's pro-active participation in coalitions, partnerships, and other initiatives that promote seafood sustainability and ocean conservation, both within and outside of the grocery industry. To lead in this category, a retailer would need to make public statements in support of key areas of ocean conservation. One example would be to directly communicate to policy makers and fishery management authorities the need for sustainable fishing practices and the protection of vital marine habitat like the Bering Sea Canyons (see pages 14–15).

3. Labeling and Transparency

This score is determined by the company's level of transparency, for example, about where and who it sources its seafood from, and how clearly this is communicated to its customers. Equally important is whether the company pushes its own suppliers to be transparent too, particularly about where and how they catch seafood. For customers, some companies present this data at the point-of-sale, while others opt to make it accessible online. A leader in this category would go to considerable lengths to create clear ways for people to learn more about the seafood they buy and the impacts of their choices.

4. Red List Inventory

A crucial component of a responsible seafood operation is stopping the sale of the most destructively caught or endangered seafood. Greenpeace's *Red List* is a scientifically compiled list of 22 marine species that for a variety of reasons should not currently be made commercially available. It highlights major concerns, including low stock numbers, destabilization of the ecosystem-wide food chain, and irresponsible fishing or farming practices that contribute to the collateral destruction of other marine life or habitat. A leading retailer in *Carting Away the Oceans'* Red List Inventory category would sell the fewest Red List species.

Special note on Red List:

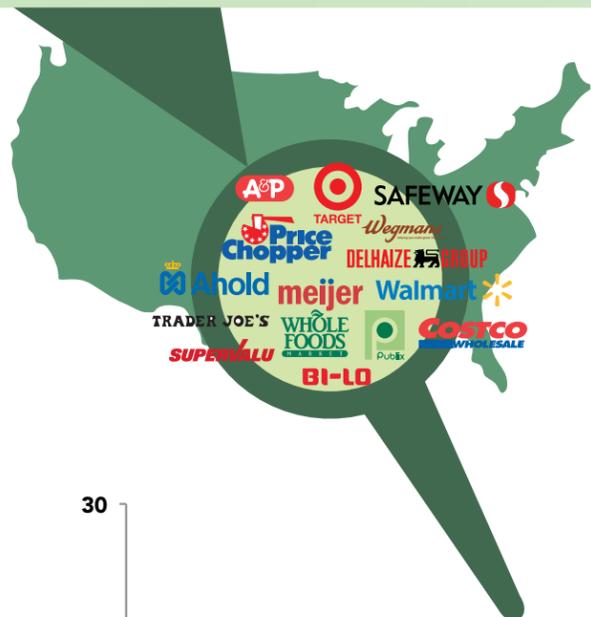
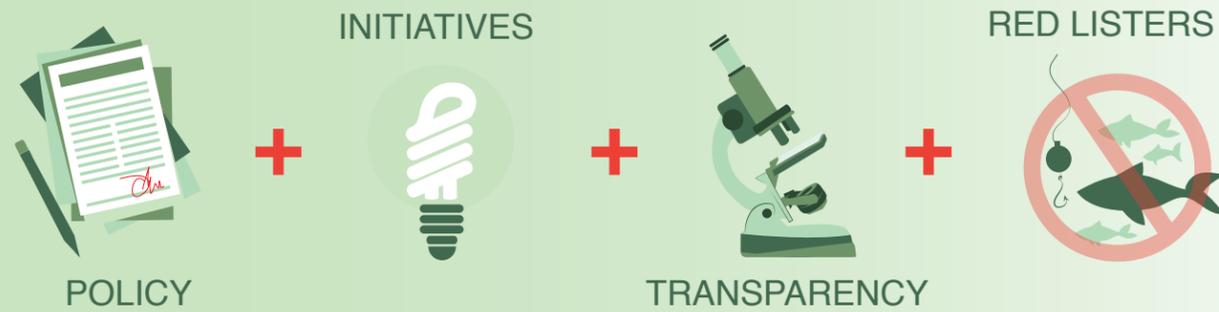
Some retailers source Red List species from farms or fisheries operating in a protective or less damaging manner (e.g., pole-and-line tuna fishing). This may include collaborating with environmental NGOs in Fishery Improvement Projects (FIPs) that address the problems that caused the species to be red-listed in the first place. Sourcing in a more responsible manner may counter a retailer's poor score associated with selling those particular Red List species.

2014 SEAFOOD RETAIL SCORECARD

Fail 0-4

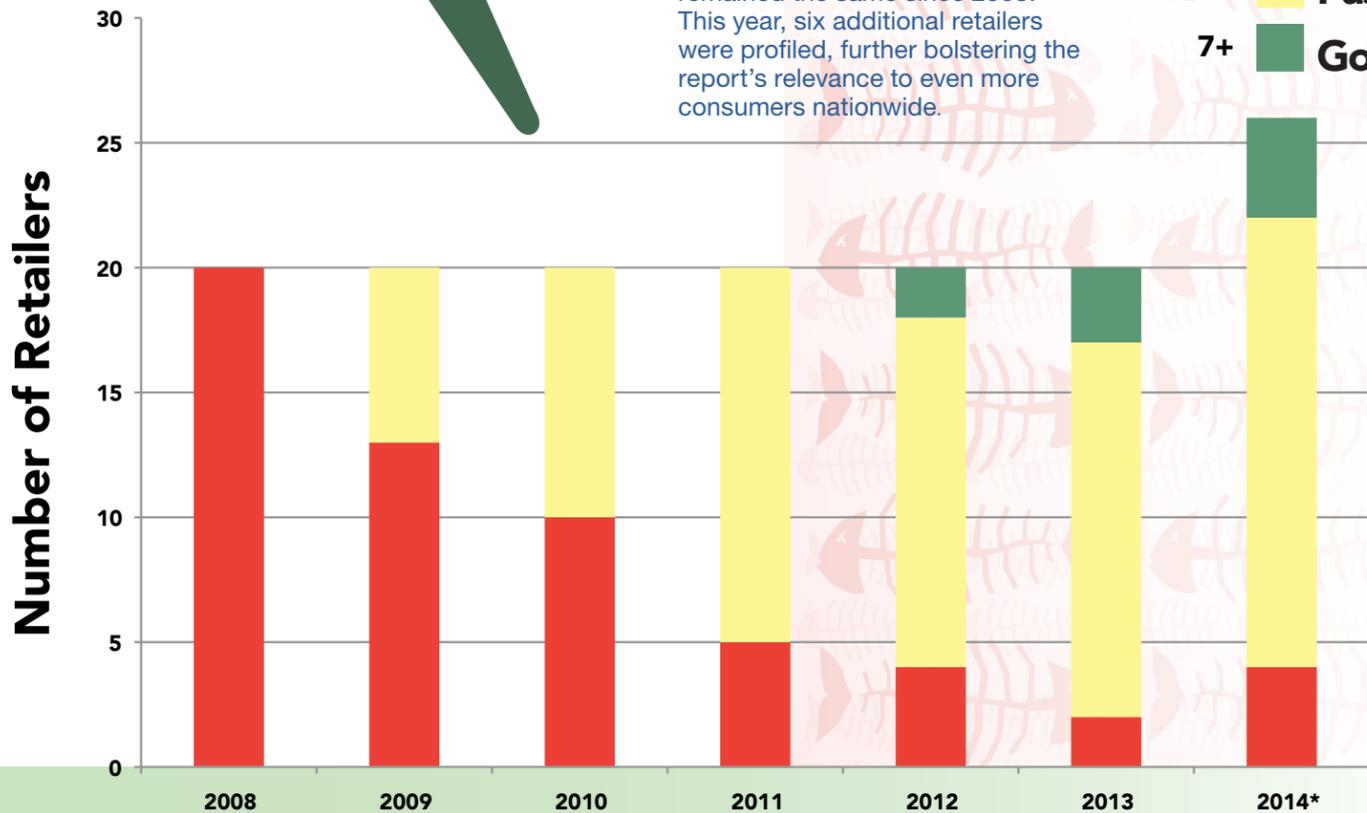
Pass 4-7

Good 7+



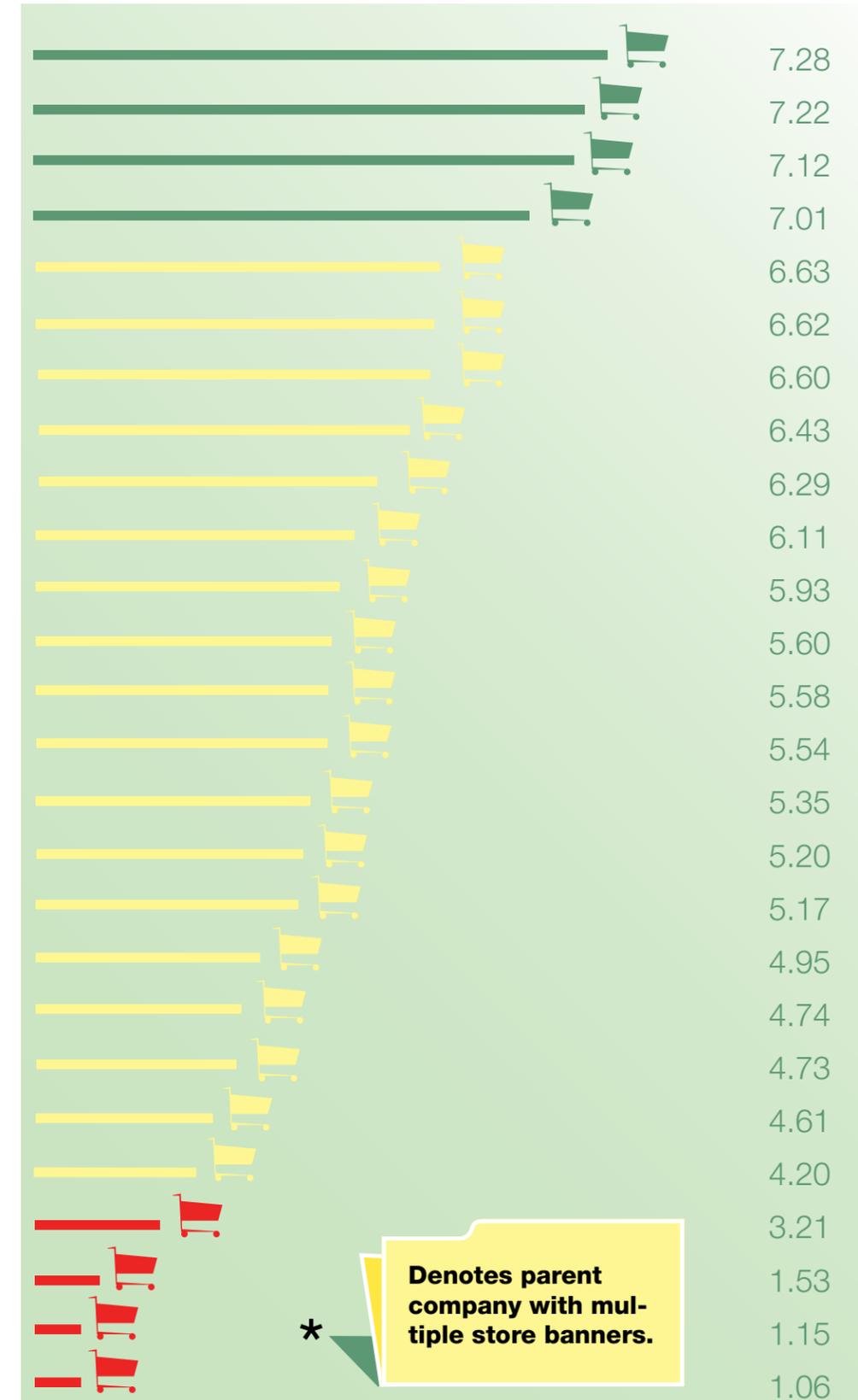
The chart below reflects the overall positive trend in improved seafood sustainability among U.S. retailers. The scoring methodology has remained the same since 2008. This year, six additional retailers were profiled, further bolstering the report's relevance to even more consumers nationwide.

score of
 0-4 **Fail**
 4-7 **Pass**
 7+ **Good**



*six retailers added in 2014

- #1 Whole Foods
- #2 Safeway *
- #3 Wegmans
- #4 Trader Joe's
- #5 Hy-Vee
- #6 Harris Teeter
- #7 Aldi
- #8 Target
- #9 Ahold USA *
- #10 Delhaize *
- #11 Meijer *
- #12 Walmart*
- #13 H-E-B *
- #14 Price Chopper
- #15 Costco
- #16 Giant Eagle *
- #17 A&P *
- #18 SUPERVALU *
- #19 Wakefern *
- #20 Albertsons *
- #21 Kroger *
- #22 WinCo
- #23 Publix
- #24 Save Mart *
- #25 Bi-Lo
- #26 Roundy's *



* Denotes parent company with multiple store banners.

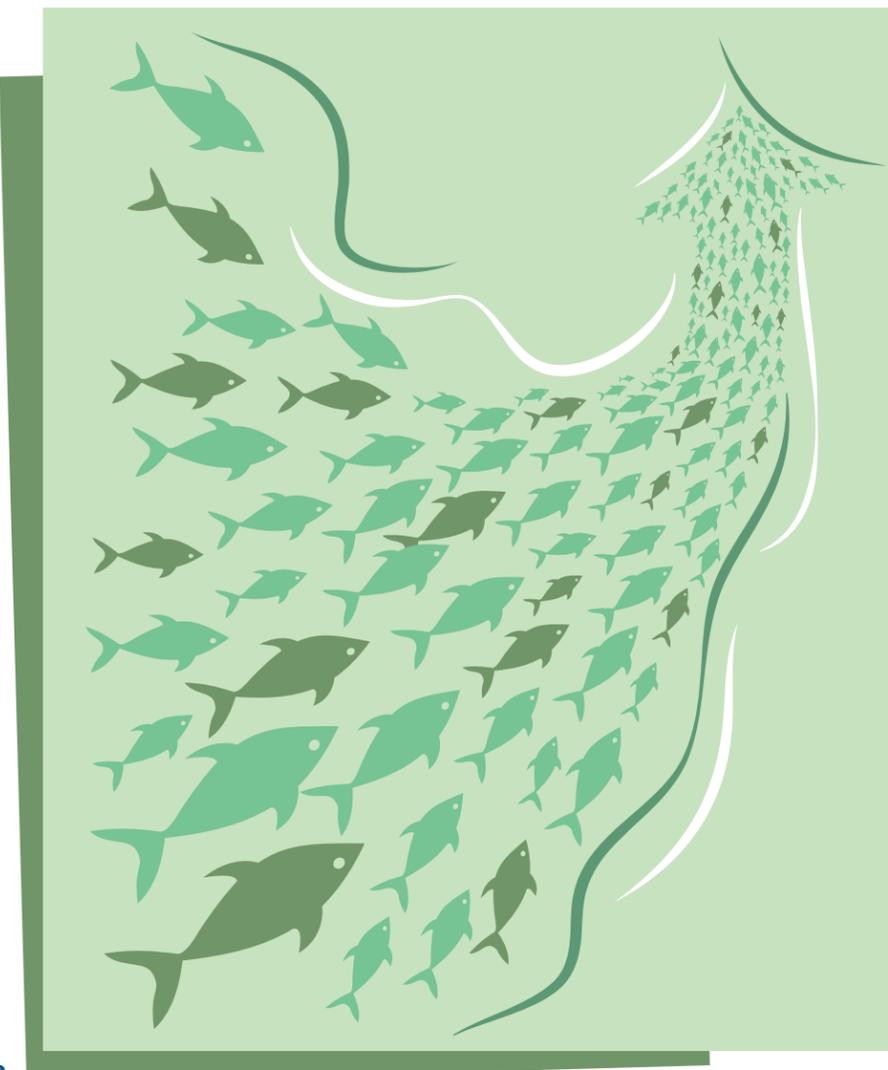
Full retailer profiles begin on page 17.

USING THE POWER OF THE MARKET TO CLEAN UP FISHERIES

Fishery Improvement Projects (FIPs) typically involve a collaboration of buyers, suppliers, and producers working to solve problems facing a given fishery. While FIPs (and their aquaculture equivalents, AIPs) are usually led by industry, sometimes NGOs provide technical advice along the way. Common areas of focus include bycatch rates, habitat impacts, and population levels.

A FIP can operate on any scale. It can apply to a small artisanal fishery targeted by only a few small boats, or to a large global commodity fishery that sustains a major industrialized fleet. When focused on delivering measurable sustainability benefits, FIPs can address many of the environmental problems experienced by fisheries. In practice however, many FIPs can operate without critical pieces needed for an effective fishery resuscitation plan: they may lack meaningful tracking or measurement metrics, focus on minor aspects of a given fishery without addressing its most significant problems, or have no meaningful timeline or target milestones. Part of Greenpeace's work within the context of *Carting Away the Oceans* is to differentiate these low-performance FIPs from more effective ones. Participating in a credible and effective FIP can help improve a retailer's score in the report.

Greenpeace is encouraged by the growth of FIPs on a global scale, but retailers, regulators and NGOs need to question the metrics and outcomes of these projects in order to make sure they really do create positive change on the water.



GMO SALMON: The Fish Retailers Don't Want to Touch.

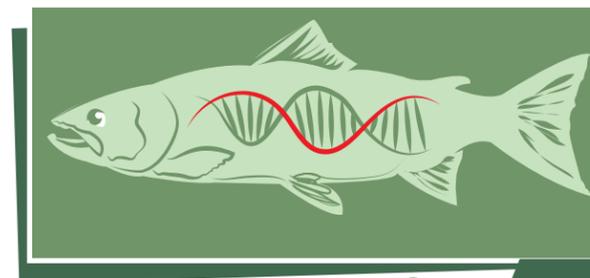
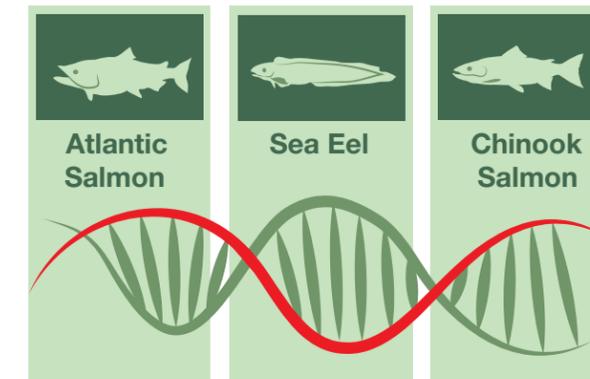
A key role retailers play in championing sustainable seafood is to counter the biotech industry's push for genetically modified (GMO) fish and help consumers understand why it's important to do so.

There is still significant confusion as to what GMO species actually are and the danger they pose to natural species; Aquabounty Technologies' GMO salmon offers a good explanation. It was created via the transgenic splicing of genes from a sea eel, an Atlantic salmon, and a Chinook salmon, effectively "mating" three species with each other at once. Aquabounty has been lobbying the Food & Drug Administration (FDA) for years to approve the sale of this salmon as a "new animal drug"—thereby deeming it legal to sell to humans for consumption.

This is problematic for numerous reasons. If this product is approved by the FDA, nothing will prevent companies like Aquabounty from selling its eggs to any buyer. These GMO salmon are not fully sterile and since offshore fish farms (the most likely buyer of GMO salmon eggs) regularly experience escapes, the fish could potentially escape, breed, and outcompete wild salmon species.

Other U.S. Federal agencies, like the U.S. Fish & Wildlife Service¹, have expressed grave concerns about GMO salmon. Unlike traditional crossbreeding practices (e.g., a labrador and a poodle), transgenic modification involves the use of genetic material that would never be combined through normal evolutionary processes (e.g., a labrador, a poodle, and a cat). Genes often affect multiple characteristics and their expressions are rarely isolated. GMO salmon have already exhibited abnormally higher rates of deformities² and evidence of a potentially unsafe hormone,³ which could create allergic reactions in some consumers.⁴ Aware of the consumer opposition, GMO companies and their lobbyists have actively fought mandatory labeling and consumers' right-to-know what they are buying.

Retailers are stepping forward to protect consumers and the environment by pledging to not sell GMO salmon should it become available. As reported by environmental non-profit group Friends of the Earth in March 2014, two of the top five biggest U.S. retailers (based on annual revenue)—Safeway and Kroger⁵—have recently made important commitments to keep GMO seafood off the shelf. The graph below illustrates the change over the past year in number of stores that have made similarly strong commitments:



¹ Documents released through 2010 FOIA request to United States Fish & Wildlife Service. Available at <http://www.foodandwaterwatch.org/pressreleases/troubling-emails-reveal-federal-scientists-fear-fda-approval-of-genetically-engineered-salmon/>.

² Study conducted by the Department of Biostatistics of the Bloomberg School of Public Health at Johns Hopkins University, in collaboration with Food & Water Watch.

³ Food and Drug Administration Center for Veterinary Medicine. Veterinary Medicine Advisory Committee.

⁴ Briefing Packet: AquAdvantage Salmon." September 20, 2010 at 68.

⁵ See e.g., Nordlee, J. et al. "Identification of a Brazil-Nut Allergen in Transgenic Soybeans." *The New England Journal of Medicine*. March 14, 1996; and Young, E. "GE pea causes allergic damage in mice." *New Scientist*. November 21, 2005.

⁶ <http://www.foe.org/news/archives/2014-03-kroger-safeway-join-trend-away-from-gmo-food>



The Good, the Bad and the Ugly

Tuna is the most popular wild-caught seafood in the U.S. While the cost of fresh tuna for sushi gets a lot of attention, Americans actually consume more *canned* tuna, making the U.S. the largest canned tuna market in the world. The two most common canned tuna species are skipjack (labeled “chunk light”) and albacore (labeled “solid white”). How this tuna is caught makes a huge difference to the potential impact on our oceans (see pop-out box across), especially as the trend for protein-based diets drives consumption.

Labels such as “Dolphin Safe” have led consumers to believe that the days of tuna contributing to ocean destruction are over. While this is far from the case, some significant progress in the market—led by retailers—has taken place since Greenpeace’s last *Carting Away the Oceans* report in 2013. For example, Whole Foods and Hy-Vee are both in the process of launching new sustainable tuna products this year.

The market for sustainable canned tuna roughly divides into two sections: (1) the niche brands that have made sustainability the core feature of their brand, such as Sustainable Seas and Wild Planet, and (2) certain private-label (store brand) products from some major retailers, details below.

	Safeway	Walmart	Trader Joe’s	Hy-Vee	Whole Foods
Pole & Line skipjack			Skipjack Tuna	Hy-Vee Select Responsible Choice	365 brand chunk light and “Pole & Line” skipjack
Pole & Line albacore				Coming soon	365 brand albacore and “Pole & Line” albacore
FAD-free skipjack	Safeway Select	Ocean Naturals Skipjack Chunk Light			
Ocean-safe longline	Coming soon				

While this report does not evaluate the performance of national brand tuna products, the three biggest tuna companies in the U.S.—StarKist, Bumblebee and Chicken of the Sea—all source their tuna using destructive fishing methods. This also reflects poorly on retailers that are willing to stock those brands. On the other hand, Whole Foods and Trader Joe’s get credit for not stocking these brands. **See the photos below for examples of private label sustainable canned tuna in stores nationwide.**



Irresponsible Tuna Fishing:

Skipjack tuna is usually caught using **Fish Aggregation Devices (FADs)**, which are man-made floating objects used to attract fish from miles around. Fish gather around the FAD thinking it’s a safe shelter. This then attracts sharks, rays, sea turtles, juvenile tuna and more fish. Tuna fishing vessels deploy purse seine nets around the FADs, catching and killing all the species in the surrounding water. Many of these animals are simply thrown overboard, dead. This is known as “bycatch,” and wastes thousands of tons of edible seafood every year¹. Fishing without the use of FADs results in far less bycatch and has been proven to be cost effective as well. Pacific tuna vessels are already required by law to fish without FADs for several months out of the year.

Albacore and yellowfin tuna are generally caught on **conventional longlines**: thick plastic ropes attached to thousands of individual hooks in series. Conventional longlines can stretch for miles, and kill countless seabirds, sharks, and turtles every year. Greenpeace is calling on fishing companies to adopt better longlining practices, such as transitioning to less destructive fishing gear and refusing to do business with illegal fishing vessels, to help protect our marine resources and ocean ecosystems.



¹ See Dempster T, Taquet M (2004). Fish aggregation device (FAD) research: Gaps in current knowledge and future directions for ecological studies. *Reviews in Fish Biology and Fisheries*; 14(1): 21–42. Accessed April 2014 at: <http://archimer.ifremer.fr/doc/2004/publication-721.pdf>, at page seven; Amandè MJ, Ari J, Chassot E, Chavance P, de Molina AD, Gaertner D, Murua H, Pianet R, Ruiz J (2010). By-catch and discards of the European purse seine tuna fishery in the Atlantic Ocean: Estimation and characteristics for 2008 and 2009. *Collect. Vol. Sci. Pap. ICCAT*, 66: 2113–20. Accessed April 2014 at: http://www.iccat.es/Documents/CVSP/CV066_2011/no_5/CV066052113.pdf



How Supermarkets Can Invest in an Insurance Policy for “America’s Fish Basket”.

More than half of all the seafood landed in the U.S. comes from the Bering Sea, aptly coined “America’s Fish Basket”. The Bering Sea is home to two of the world’s largest underwater canyons, Zhemchug and Pribilof, which contain corals and sponges that sustain a whole ecosystem of fish, sea mammals, and other life.

Retailers play an incredibly important role in ensuring the Bering Sea is able to continue providing much of America’s seafood, including pollock, crab, halibut, and Pacific cod. Fishing methods used in the canyons involve gear that makes contact with the seafloor. Scientific evidence has shown this to be the greatest threat to coral and sponge habitat in Alaska, potentially destroying breeding grounds for key species¹.



The majority of fishing activity in the canyons is coming from the Alaska pollock and Pacific cod fisheries, yet fishing vessels only catch under 4% of their total catch there. It is reasonable, therefore, to set aside a representative portion of the Bering Sea canyons by creating conservation areas that can preserve the region’s long-standing biodiversity. However, the North Pacific Fishery Management Council, the body tasked by the Federal government to manage fisheries and conservation in the region, has not yet put any protections in place for the canyons or the highly productive shelf-break zone.

Forward-thinking retailers—Safeway, Trader Joe’s, Hy-Vee, Ahold USA, and Supervalu—have supported a call to protect a representative portion of the canyons. This precautionary, science-based tool should be considered a part of a balanced approach to preserving fishing grounds while protecting key habitat that is important for commercial species, other marine life, and the indigenous communities that depend on a healthy Bering Sea ecosystem. While the percentage of the catch coming from the canyons is quite low, their value as breeding and nursery grounds, and essential fish habitat is critical, and yet to be fully understood by scientists.

For seafood businesses, setting aside a portion of the vital shelf-break and canyons habitat provides a valuable insurance policy that can help ensure the future health of the ecosystem, and the fisheries it sustains. With the increasing impacts of climate change and ocean acidification, as well as the cumulative degradation of seafloor habitat by industrial fishing gear, creating a buffer against uncertainty makes sense from an economic perspective as well as an ecological one.

¹ Stone, R.P., and S.K. Shotwell. 2007. State of Deep Coral Ecosystems in the Alaska Region, pp. 65-108, In: S.E. Lumsden et al.(eds.), The State of Deep Coral Ecosystems of the United States, NOAA Technical Memorandum CRCP-3, Silver Spring MD, 365 pp.

HUMAN RIGHTS ABUSES IN THE SEAFOOD SUPPLY CHAIN

Transparency isn't only about guaranteeing that seafood is being responsibly sourced. The global seafood industry is complicit in a variety of human rights abuses of which consumers are rarely aware. The cases in the chart below have occurred in the tuna industry, on board Thai trawlers, Russian crabbers, and in the South and Southeast Asian shrimp farm industry, to name just a few. Given that over 70% of the seafood consumed in the U.S. is imported, these abuses could be present in the supply chain that provides meals for people across America every day. In addition to stronger international cooperation and bolstered, uncompromised enforcement, greater transparency in the supply chain can help retailers avoid inadvertently sourcing seafood from suppliers associated with human rights scandals.

No Monetary Compensation

People may sign up to work on fishing vessels through recruitment agencies that “exploit poverty and illiteracy to extract extortionate sums of money from job seekers” (EJF). Some crew members are “not paid with money, but in boxes of ‘trash’ fish—the bycatch rejected by the European Market” (The Guardian). Special Indonesian and Taiwanese investigations found that crewmembers “had been working on the tuna fishing vessels for between three and five years without being paid.” (Under Current News).



Perpetual Debt

Many shrimp farmers fall into debt which they cannot repay due to low incomes and the cost of supplies needed to keep working in the industry. “As well as accruing interest, these loans oblige farmers and fry collectors to sell their produce at a fixed price to intermediaries” (EJF). “Double bookkeeping” also occurs when “workers are tricked into signing a contract in which money from their pay is removed for agency fees, as well as leave pay, subsistence, and cash advances” (EJF). Unfortunately, this accrued debt is sometimes passed on to the next generation of farmers.



Physical Abuse

“Poor health and hygiene standards can be found on both the crew decks and fish holds of IUU [Illegal, Unreported & Unregulated] vessels” (EJF). Special investigators among Thai ships were told of “captains force-feeding amphetamines to half-starved crew members, the routine killing of those who complain, and Burmese migrants leaping from the backs of vessels in suicidal bids to escape the torment of life at sea” (The Ecologist). Men work in the fish hold with no air ventilation; they are beaten for mistakes, and are sometimes killed; in a report on trafficked Cambodians, “59% had witnessed a boat captain murder a crew member” due to a crew member’s incompetence or lack of efficiency on board the vessel (NBC News, 2010).



Trafficking

Each year, many men living in poverty in places like Burma, Cambodia, Laos, and Vietnam are “lured from their homes with the promise of better paying jobs in Thailand” only to discover that they were tricked into slavery on board a fishing ship. (IRIN Humanitarian News). While the Thai fishing industry is not the only player, it is the largest stakeholder in the trafficking business. Many of these workers are undocumented, thereby making the trafficking process much easier for those who take advantage of the impoverished workers. To make matters worse, criminal traffickers sometimes bribe police officers to turn a blind eye (CNN, 3/6/14).



How Illegal Fishing Vessels Evade Enforcement

In addition to avoiding scrutiny of illegal fish in their possession, vessels that engage in Illegal, Unreported, and Unregulated (IUU) fishing may rely on “flags of convenience” (FOC) to bypass inspections of their crew treatment and training, to minimize operating costs, and disregard vessel safety requirements and maintenance. Under international law, the country whose flag a vessel flies is responsible for controlling its activities. IUU vessels can engage in “flag hopping”—where they can re-flag numerous times in a season to confuse management and surveillance authorities, and avoid prosecution.

RETAILER PROFILES

LEGEND



Bering Sea Badge:
Awarded to each of the five retailers who have taken a stand in urging for the protection of the Bering Sea Canyons.



Improvement Badge:
Awarded to four retailers total: each of the three retailers who have shown most improvement in their overall score since last year, as well as the top newly profiled retailer Hy-Vee



Canned tuna badge:
Awarded to each of the five retailers that sell sustainable private-label tuna.



Category winner badge:
Awarded to each of the category winners of the following four categories: Policy, Initiatives, Labeling and Transparency, and Red List.

Fail 0-4

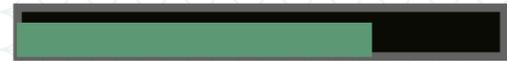
Pass 4-7

Good 7+

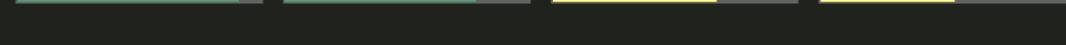


#1 Whole Foods

OVERALL SCORE 7.28

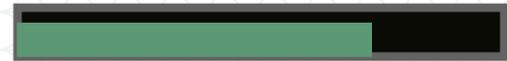


POLICY: 90.76 INITIATIVES: 78.34 TRANSPARENCY: 67 RED LIST: 55

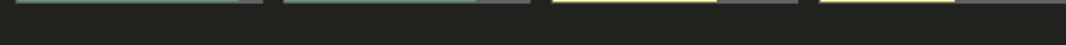


#1 Whole Foods

OVERALL SCORE 7.28



POLICY: 90.76 INITIATIVES: 78.34 TRANSPARENCY: 67 RED LIST: 55



Headquarters: Austin, Texas

Stores and Banners: Over 350 stores in the U.S. operating as Whole Foods Market and Harry's Farmers Market

Background: Whole Foods Market is the world's largest purveyor of natural and organic products. Whole Foods stays on top of the growing consumer trend toward sustainable living by constantly reviewing the health, nutritional, and environmental impacts of its products. Its 2013 fiscal year annual revenue was \$12.9 billion.

Greenpeace Comments: Whole Foods remains the leader of this year's *Carting Away the Oceans* report for the second year in a row. It actually dropped slightly in overall score from last year due to a drop in its Red List inventory performance. It either improved or remained the same in other categories. It is only due to outstanding performance in areas such as its policy (surpassing the 90/100 mark) that it is able to come out on top despite a mediocre Red List inventory.

The company continues to offer the most sustainable canned tuna section of any major U.S. retailer, consisting mainly of a multitude of troll-caught albacore products and the company's private label pole-caught skipjack. In fact, Whole Foods has recently released both a new pole-and-line skipjack and pole-and-line albacore product, giving further options to consumers when it comes to shelf-stable sustainability—with additional traceability to boot. Finally, Whole Foods has eschewed selling conventionally sourced tuna storewide, steering clear of the problems associated with tuna companies such as Chicken of the Sea, Bumble Bee, and Starkist. This in turn means that shoppers at Whole Foods can be confident that their canned tuna purchases are in no way supporting destructive tuna fishing.

On a less positive note, Whole Foods struggles with an over-reliance on the Marine Stewardship Council (MSC)'s recommendations on fresh and frozen products—including Red List species. The retailer carries several controversially-certified products (see Red List section below). Still, the company's strong ties to MSC could theoretically be used for positive change if Whole Foods were to push back on dubious certifications or procedures.

Sustainable Seafood Policy: Whole Foods maintains the strongest and most complex sourcing policy of any of the retailers examined in this report, and also operates a highly effective policy governing the purchasing of its canned tuna. While there are still some areas for improvement, as some Red List species being sold could be considered to violate the policy, there is no question that its policy should be applauded, and is impressive not only in relative to other retailers, but also in absolute terms.

Whole Foods invites the cooperation of independent scientific and environmental organizations for guidance on what it should purchase. The company's aquaculture policy includes a strong public stance against GMO seafood, and it requires fish farms to minimize the environmental impacts of their operations, which includes having protocols to prevent fish from escaping the farms and adhering to sustainable maximum stocking density limits. Furthermore, antibiotics, growth hormones, and poultry and mammalian by-products may not be used in feed. Finally, strong traceability measures ensure that farmed seafood is tracked from farm to store.

Seafood Sustainability Initiatives: Whole Foods supports sustainable fishing practices by actively partnering with suppliers, the MSC, and other groups to encourage responsible practices. Whole Foods supports the "Common Vision for Environmentally Sustainable Seafood," an initiative of the Conservation Alliance for Seafood Solutions that aims to build an active partnership between conservation organizations and seafood retailers in support of achieving sustainable fisheries. It participates in the policy arena by communicating to the government to promote better enforcement of fishing vessels, and by being a strong voice on strong environmental criteria in aquaculture legislation. It could do even better by supporting the protection and promotion of marine reserves.

Labeling and Transparency: Whole Foods uses a pioneering labeling program in concert with the Monterey Bay Aquarium (MBA) and the Blue Oceans Institute (BOI). The program is designed to increase available information at point-of-purchase regarding the sustainability of various seafood options.

Whole Foods provides information to its customers on its website and trains its seafood counter staff to answer questions about seafood sourcing and catch methods. Its online blog also prominently features seafood sustainability. The company's Aquaculture Standards are available online, setting a strong example in terms of transparency. Brochures on mercury in seafood are available to consumers upon request. Whole Foods also educates its customers about the environmental benefits of frozen seafood, which can take the "slow boat" route to market and thus has a much smaller carbon footprint than fresh seafood, which requires immediate shipping.

This year, Whole Foods's new pole-and-line canned tuna products for both skipjack and albacore contain a user-friendly format for traceability. Each can will have a label on the top informing shoppers about the fishing vessel that caught the fish, type of fish and year it was caught, as well as a code on the bottom that the shopper can scan to learn more about the fisherman and how pole-and-line works.

Red List Seafood Sales: This is the retailer's glaringly weak category in an otherwise strong showing. Unfortunately, Whole Foods re-introduced Atlantic halibut this year. The retailer employs a variety of means to still stay afloat overall, despite carrying a high number of Red List species for an otherwise top performer. It has dropped the sale of species that most other retailers still carry, employs a variety of mitigation tools that dampen the harm of carrying an unmitigated Red List product, and participates in several fishery/aquaculture improvement projects.

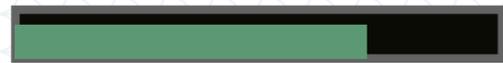
Whole Foods sells fourteen of the twenty-two Red List seafoods: Atlantic halibut, hoki, Chilean sea bass, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, bigeye tuna, Greenland halibut, monkfish, red snapper, swordfish, tropical shrimp, and yellowfin tuna.



Whole Foods has introduced yet another pole-and-line caught product for both skipjack (from the Maldives) and albacore (from the U.S.). These products also feature additional traceability information that allows consumers to find out more about who caught the tuna and when it was caught.

#2 Safeway

OVERALL SCORE **7.22**

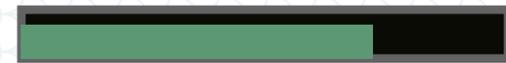


POLICY: 82.33 INITIATIVES: 80.02 TRANSPARENCY: 65.5 RED LIST: 61

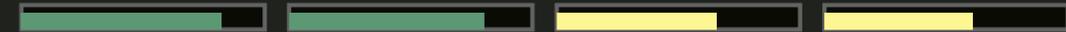


#2 Safeway

OVERALL SCORE **7.22**



POLICY: 82.33 INITIATIVES: 80.02 TRANSPARENCY: 65.5 RED LIST: 61



Headquarters: Pleasanton, CA

Stores and Banners: 1,406 stores operating as Safeway, Carrs, Genuardi's (Audubon, PA only), Pavilions, Randall's, Tom Thumb, VONS

Background: Safeway is one of the largest grocery chains in the United States and operates 1,406 supermarkets under seven banners, mostly in the Western and Southwestern regions, but also in the mid-Atlantic region. Safeway offers a wide array of grocery items, including store brand organic foods and household products. It had annual sales of \$37.3 billion in the 2013 fiscal year. Last year it sold off its 213 stores in Canada, and plans to discontinue its Dominick's banner in the U.S., having already sold some of these stores to Roundy's Supermarkets. This year, Cerberus Capital Management (the parent company of Albertsons) will be acquiring Safeway. For the moment however, Safeway is still its own entity, and is profiled as such in this report.

Greenpeace Comments: Safeway made steady gains over the past year, closing the gap between itself and front-runner Whole Foods—to within six-hundredths of a point. Company leadership demonstrated an interest and energy over the past year in further exploring ways to use its large size to have a likewise large impact on the oceans.

Given the news earlier this year that Albertsons' parent company will purchase Safeway, there is uncertainty in the future regarding the company's sustainability. After all, Albertson's performance in this report is a far cry from Safeway's current standing. If however, Safeway maintains its drive and freedom to innovate in this area without interference, then there should be no problem.

Last month, Safeway released a new sustainable tuna product for albacore — a longlined product that merits being ocean-safe, unlike conventional longlined tuna — due to a number of modification and mitigation techniques. This new affordable albacore is being offered in conjunction with Safeway's already-existing FAD-free responsibly-caught chunk light tuna. The next step in the shelf-stable category would be to phase out the sale of third party national brands that rely on destructive fishing methods.

Safeway will also need to implement a number of reforms over the course of this year to make good on its standing commitment to rid itself of all unsustainable seafood by 2015.

Sustainable Seafood Policy: Safeway maintains a seafood policy of meaningful and aggressive sourcing guidelines. It also has existing corporate guidelines on improving traceability and social welfare issues in other areas that can and should be applied to seafood sourcing, especially in light of the growing body of evidence of human rights abuses associated with certain fishing and farming practices.

Safeway's policy precludes the retailer from adding any new Red List species to its inventory, and thus many of the stipulations that would trigger such a listing (destructive gear types, high fish meal in feed, etc.) are immediately eliminated from the realm of possibility. To its credit, Safeway did not add any additional red-listed species this past year. However, this policy is not yet fully retroactive; there are a number of Red List species that Safeway continues to sell which the company would not be able to add to its inventory under these guidelines.

Finally, in response to consumer pressure and mounting opposition to the idea of unlabeled genetically modified seafood coming to market, Safeway made the following public statement: "Should GE salmon come to market, we are not considering nor do we have any plans to carry GE salmon." Given Safeway's enormous size, its recent public statements, along with statements from Kroger's, are no small commitments.



Seafood Sustainability Initiatives: Safeway threw its support for a second time behind protection of the Bering Sea Canyons by writing a second letter to the relevant fishery management council to implement conservation measures to safeguard this important habitat. The company also did so despite certain large-scale industry players' disapproval of the retailer's previous letter, demonstrating that it is ultimately consumers and retail purchasers that have the final word on sustainability.

Internally, it effectively tracks overall tonnage of Red List species that it phases out over time. This internal benchmarking and measuring is a useful tool by which to evaluate overall impact on the oceans, and of particular significance for a retailer the size of Safeway. Safeway has publicly committed to not buy seafood from the Ross Sea and has also issued a call for a no-take marine reserve to encompass this ecologically invaluable area. It has also previously spoken out on urging reforms for the British Columbia trawling industry to minimize ecosystem impacts, and has promoted stronger environmental criteria in U.S. aquaculture legislation.

Labeling and Transparency: Safeway has increased the amount of information available to its customers through the development of in-store brochures and informational kiosks, as well as via online educational tools. The main principles and parameters of the company's sustainable seafood policy are available in a variety of forms (in-store brochures, Corporate Social Responsibility documents, etc.), but some of the details used in the actual purchasing process do not appear to be accessible to the public.

Red List Seafood Sales: If Safeway's generally positive trends are held back in any aspect, it is by the company's overall Red List inventory. While several of the Red List species sold by the company are sourced (at least in part) from ongoing fishery improvement projects, many of these projects do not yet directly provide product to the retailer.

Safeway currently sells twelve of the twenty-two Red List seafoods: Chilean sea bass, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, bigeye tuna, ocean quahog, red snapper, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

Safeway is engaged in fishery improvement projects concerning Atlantic cod. It is anticipating sourcing from fishery improvement projects (FIPs) for fresh and frozen bigeye and yellowfin tuna, but this is not yet underway. The company is also exploring ways to improve in the areas of Alaska pollock, Atlantic salmon, and tropical shrimp. It is also actively phasing out the sale of ocean quahog (usually found in canned clam chowder) to the point where it soon will be selling no more. To quickly improve in this area, Safeway should drop the sale of Chilean sea bass immediately.



Screenshot of Safeway's May 2014 tuna sourcing video, in which the retailer explains the harm caused by Fish Aggregating Devices (FADs) and promotes its private label brand of FAD-free canned tuna.

#3 Wegmans

OVERALL SCORE 7.12



POLICY: 77.17 INITIATIVES: 87.52 TRANSPARENCY: 62 RED LIST: 56



INITIATIVES

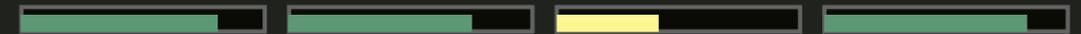


#4 Trader Joe's

OVERALL SCORE 7.01



POLICY: 80.72 INITIATIVES: 75.18 TRANSPARENCY: 41.5 RED LIST: 83



RED LIST



Headquarters: Rochester, NY

Stores and Banners: 83 stores operating as Wegmans

Background: Wegmans is a privately held, family-owned company, founded in 1916 by the Wegman family. Its annual revenue for the 2013 fiscal year was \$6.8 billion. In 2014, it is ranked #12 in Forbes Magazine's "100 Best Companies to Work For."

Greenpeace Comments: Wegmans has made great progress over the past year, and deserves praise for its first-time appearance in the coveted green category of retailers.

The chain continues to set a strong standard for the industry, especially through its willingness to take progressive, ethical stances on significant policy issues. The main impediment to the company's continued improvement is the company's sizable inventory of Red List species. To its credit however, Wegmans has given this area a hard look over the past year and in several cases made significant sourcing changes that mitigated in whole or in part some of the problem areas that first made the seafood deserve to be Red Listed in the first place. These changes are reflected in this year's score.

Sustainable Seafood Policy: Wegmans should strongly consider expanding the application of its seafood policy to all of its offerings—including shelf-stable seafood. This is a glaring area in an otherwise solid showing—sustainable canned tuna is not this retailer's forte, but it doesn't have to be that way. Every other retailer in the good category has managed to find a way to source sustainable and affordable private-label tuna. On that note, Greenpeace strongly encourages Wegmans to make good on its pledge to discontinue unsustainable species that cannot be sourced from environmentally preferable sources.

Otherwise, Wegmans has a publicly available, robust sustainable seafood sourcing policy that incorporates its guidelines for sourcing both wild-caught and farmed products. Wild-caught items must be captured according to local regulations and properly reported capture methods used must meet its standards. Stock strength, bycatch rates, and social impacts are also taken into account.

Wegmans's farmed products are sourced from suppliers that are working to "minimize or eliminate the use of wild fish in the feed, pesticides, and antibiotics." The retailer also strives to avoid patronizing farms that cause undue habitat alteration and/or land loss, are associated with human rights abuses, or source brood-stock from red-grade fisheries.

Seafood Sustainability Initiatives: Wegmans continues to dominate in this area, and is more willing than any other retailer to take strong stands on political conservation measures. Historically, Wegmans led the charge to protect the Ross Sea and has participated in the ongoing revitalization of the Chesapeake Bay in a number of ways (pertaining to crabs and oysters), both through engagement with policymaking bodies and its supplier connections.

Its seafood sourcing and supplier requirements are unparalleled by other retailers. Its chain of custody is certified by MSC. Recently however, Wegmans removed its partial pledge to protect the Bering Sea Canyons from its website, which was an unexpected step back. However, it continues to avoid sourcing its own private label brand Alaskan pollock from the ecologically-sensitive Bering Sea Canyons. Greenpeace urges Wegmans to re-commit to this important initiative.

Labeling and Transparency: Wegmans made no changes in this area from last year. It has a fair amount of data available for consumers at the point of sale, including port of landing and catch vessel. It could improve in this area by making this information available on all of its products. The company's seafood sourcing policy is available online and in print. Wegmans employees are trained to be knowledgeable about seafood choices, labeling, and sustainability.

Red List Seafood Sales: This is Wegmans's poorest category, though over the past year the retailer made good-faith efforts to mitigate some of the harms associated with sourcing of certain Red Listed species (for example, safer methods of capture). Unfortunately, it also re-introduced Atlantic halibut for a few months of the year. It is only because of its higher scores in other categories that it managed to make it so high on the charts.

Wegmans sells fourteen of the twenty-two Red Listed species: Atlantic halibut, Chilean sea bass, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, bigeye tuna, ocean quahog, red snapper, skates and rays, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

Headquarters: Monrovia, CA

Stores and Banners: 208 stores operating as Trader Joe's

Background: Trader Joe's operates more than 415 stores across the country and prides itself on offering rock-bottom prices and a wide array of single-serving and prepared meals made with natural and organic ingredients. Trader Joe's buys directly from producers and offers a variety of grocery products under its own private label. Its annual revenue for the 2013 fiscal year was \$11.3 billion.

Greenpeace Comments: Trader Joe's surged up the charts in the last report. Since then, it has maintained its score from last year due to both positive and negative changes that balanced out one another. The company deserves applause for introducing a sustainable pole-and-line skipjack canned tuna product—the gold standard of tuna sustainability — at a price point that makes this product accessible for even the most budget-conscious shoppers. On the other hand, it also re-introduced a poorly sourced swordfish into its inventory. Trader Joe's maintains its green rating overall, but has been passed by faster-performing competitor Wegmans.

Sustainable Seafood Policy: Two years ago, the company discontinued half a dozen unsustainable species due to life history, bycatch, habitat destruction, or other associated problems. The company is in the process of building strong internal standards for farmed products as well, most notably farmed salmon and shrimp. That said, Trader Joe's continued defense of its sale of farmed salmon without transitioning entirely to closed-containment systems (or dropping it altogether) is of little merit.

With the recent introduction of affordable pole-and-line skipjack tuna, Trader Joe's full reformation of its canned tuna selection features shelf-stable products free of harmful conventional longlines. The company also refuses to do business with any vessel on Greenpeace's blacklist (pirate fishing vessels, many of which are tuna longline operators). Trader Joe's sources from producers using best practices in albacore — and has switched to pole-and-line sources for its yellowfin, and now, skipjack. To continue on its momentum, Greenpeace encourages the company to publicly refuse to do business with any companies engaged in shark finning.

Seafood Sustainability Initiatives: Given that Trader Joe's new sustainable skipjack product is sourced by Thai Union/Chicken of the Sea, this is a refreshing and game-changing move by an otherwise irresponsible tuna company. Hopefully, this is a sign of even more industry reform on the horizon, with major tuna companies serving as part of the solution instead of part of the problem. Trader Joe's previously communicated its concerns over the destructive practices associated with Alaska pollock in a letter to the North Pacific Fishery Management Council, and is also actively engaged in seeking out and supporting better producers in both the wild capture and aquaculture seafood sectors.

Labeling and Transparency: This is Trader Joe's weakest category. It appears to have reneged from its previous commitment to issue a monthly consumer-facing progress report on seafood, and Trader Joe's does not yet sufficiently label seafood products so that consumers can avoid purchasing destructively fished species. Since the company is highly vertically integrated, it should be able to more easily augment labeling than other, more conventional retailers.

Red List Seafood Sales: Trader Joe's leads the retailers for selling very few Red List species, though it moved backwards over the past year by re-introducing destructively-caught swordfish.

Trader Joe's sells five Red List seafood items: Alaska pollock, Atlantic salmon, Atlantic sea scallops, swordfish, and tropical shrimp. The company is involved in ongoing improvement projects, either internally or externally, in all of these categories aside from Atlantic sea scallops and swordfish.

#5 Hy-Vee



#6 Harris Teeter



Headquarters: West Des Moines, Iowa

Stores and Banners: 214 supermarkets operating as Hy-Vee

Background: Hy-Vee is an employee-owned private company and its stores are located in eight Midwestern states: IA, IL, MO, KS, NE, SD, MN, and WI. Its sales last fiscal year exceeded \$8 billion. Hy-Vee stresses strong customer service and an emphasis on its customers' desire for healthy lifestyles.

Greenpeace Comments: Hy-Vee was one of the five new retailers profiled in this year's report, and entered it in fifth place, just outside of the green zone. While other newly profiled retailers are still establishing baselines and taking stock of internal sourcing and processes, Hy-Vee's remarkable entrance can be credited to the seafood team's internal drive and proactive approach to seafood sustainability, coupled with corporate-level endorsement and confidence in its category staff.

Hy-Vee has partnered with FishWise since 2011 and has created a Responsible Sourcing Commitment that calls for Hy-Vee's fresh and frozen seafood to be responsibly sourced (i.e., green/yellow according to Monterey Bay Aquarium's seafood watch card) and traceable or in a time bound improvement process by year-end 2015. In the shelf-stable category, Hy-Vee has developed two responsibly-sourced private label canned tuna products, including pole-and-line skipjack tuna and albacore tuna. These sustainable products will be offered to customers in mid-May 2014 and by the end of the summer, respectively.

Sustainable Seafood Policy: Hy-Vee's sustainable seafood policy applies across most of its range, encompassing fresh and frozen product, though it does fall short of 100% coverage. Part of the gap in the shelf-stable arena is covered by its private label sustainable tuna, though it could improve its performance next year by addressing the other unsustainable, conventional brands that it carries.

Its wild-caught criteria are strong, and the retailer does not source from the Ross Sea. Its farmed standards are likewise respectable, though it could improve its farmed salmon standards; to that end, it is looking into closed-containment aquaculture options. It is also exploring how to avoid sourcing farmed seafood from farms associated with human rights abuses. Internally, it does not plan to purchase genetically engineered seafood because it does not meet Hy-Vee's seafood procurement policy, but it has not made any public statements to that effect.

Seafood Sustainability Initiatives: Hy-Vee has strong standards that its suppliers must live up to, and uses an external party to monitor annually for compliance. It refuses to purchase from vessels found on the Greenpeace Blacklist (a database of known illegal or "pirate" fishing operations). Finally, it trains suppliers on its policy requirements and advocates for supplier participation in industry improvements.

This year, Hy-Vee wrote a letter to the relevant fishery management council urging for the protection of a representative portion of Bering Sea Canyons, an important "breadbasket" for our nation's fisheries. It is one of five retailers profiled in the report to write such a letter. It also supports protection of the Ross Sea and does not source seafood from the area.

Hy-Vee also plays an integral and vocal role in the Food Marketing Institute's seafood working group, brainstorming and collaborating with other retailers on how to raise the bar on seafood sustainability across the industry. It also partners with FishWise and the Monterey Bay Aquarium.

Labeling and Transparency: Hy-Vee has done a good job of publicly promoting seafood sustainability to educate and engage consumers through its website, in-store signage, and flyers, and requiring its seafood category employees to take an online training course so that those behind the seafood counter are ideally better-suited to assist an inquiring customer.

However, Hy-Vee is lacking when it comes to specific on-package labeling that provides customers with more information at the point of purchase. This is what contributes most to the retailer's overall mediocre score for this section.

Red List Seafood Sales: Hy-Vee is a proponent of fishery improvement projects (FIPs) for several species, and avoids selling many of the species that other retailers carry. A glaring exception is Chilean sea bass. Hy-Vee sells ten of the twenty-two Red List species: Chilean sea bass, Alaska pollock, Atlantic salmon, Atlantic sea scallop, bigeye tuna, ocean quahog, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

It is participating in a FIP for South Atlantic albacore, tropical shrimp, and sources its fresh yellowfin product (not frozen) from a green-rated handline fishery from the Philippines.

Headquarters: Matthews, NC

Stores and Banners: 208 stores operating as Harris Teeter (prior to the January 28, 2014 merger with Kroger).

Background: Due to this year's acquisition, Harris Teeter is now a wholly-owned subsidiary of Kroger. Nonetheless, for most of the past year, Harris Teeter operated as its own entity, and as an upscale grocer that operated over 200 stores in eight states and the District of Columbia. To that end, it is being evaluated in this report as a standalone retailer. Prior to this year's merger with Kroger, it had revenues of \$4.5 billion for the 2012 fiscal year.

Greenpeace Comments: Harris Teeter's progress halted over the past year, likely due to the impending merger with Kroger. Harris Teeter informed Greenpeace that the future of the grocer's seafood policies (in light of Kroger's poorer standards) is unclear, but as of the date of this report, Harris Teeter has maintained its prior standards. Over the past year, Harris Teeter dropped one place in the relative rankings because it went back on its commitment to avoid sourcing genetically-modified seafood, should it become available on the market.

In March 2012, it became the third major U.S. retailer to take the Ross Sea Pledge by refusing to stock any seafood sourced from the Ross Sea, and publicly calling for the creation of a no-take marine reserve encompassing this unique and imperiled area. Harris Teeter's strongest categories are its sustainable seafood policy and its level of transparency to customers. To improve, Harris Teeter needs to pay attention to its sale of several Red List species, and to re-engage on its historically strong initiatives category.

Sustainable Seafood Policy: Harris Teeter has apparently backed down from its previous firm stand against offering genetically-engineered seafood to its customers, should the option become available upon FDA approval. Greenpeace strongly urges Harris Teeter to reconsider its policy regarding this potentially unsafe and environmentally dubious product.

Harris Teeter continues to have a relatively robust aquaculture policy, but lags behind in the wild capture arena, particularly in sourcing species that are not taken with destructive catch methods. Greenpeace would also encourage Harris Teeter to perform its own due diligence when evaluating species sustainability. Harris Teeter should develop strong, independent benchmarks on issues such as destructive fishing gear and harms to other non-targeted populations through bycatch.

Seafood Sustainability Initiatives: Harris Teeter's 2012 decision to stand up for the Ross Sea spoke well of the company's intentions then. However, Harris Teeter must continue to engage in important political processes on behalf of ocean conservation.

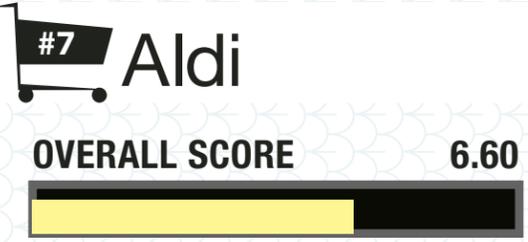
The retailer has developed strong requirements for its seafood supplier requirements, and it was the first chain to explicitly implement the Greenpeace Blacklist — the world's most comprehensive register of pirate fishing vessels — in its sourcing guidelines.

Harris Teeter could improve its performance here by finalizing its requirements for full traceability to vessel across all seafood categories, and by re-engaging in the political process by, for example, pledging to avoid sourcing seafood from the Bering Sea Canyons and advocating for its protection.

Labeling and Transparency: Harris Teeter excels in this area because of its comprehensive online seafood information database. Consumers browsing the Harris Teeter website have access to an unprecedented level of information about the seafood options sold by the company; the retailer also provides information to consumers on the stock from which the seafood was caught for some of its wild-caught inventory. Also of note: Harris Teeter provides consumers with information on mercury in seafood, and trains its seafood managers on sustainable choices.

Red List Seafood Sales: Shamefully, Harris Teeter sells Chilean sea bass; there is no excuse for selling this top-tier Red List species. Harris Teeter could explore ways to sell certain other species, like monkfish, that are caught in a less destructive manner. Harris Teeter could also explore ways to begin supporting domestic fishery improvement projects.

Recent Greenpeace surveys found that Harris Teeter continues to sell twelve Red List seafoods: Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, Chilean sea bass, grouper, monkfish, ocean quahog, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.



Headquarters: Batavia, IL

Stores and Banners: 1,227 stores operating as Aldi

Background: The Aldi chain of supermarkets began in Germany and today operates throughout much of Europe and the U.S. Today, there are 1,227 ALDI stores in most states east of Kansas. The company specializes in offering low-cost and bulk options to price-conscious shoppers throughout the Midwest and Appalachia.

Greenpeace Comments: Aldi made remarkable progress this year, and was second only to Meijer in largest point increase from last year. It is only *two hundredths* of a point behind Harris Teeter, and has maintained its relative ranking only because of newcomer Hy-Vee's high score. Aldi made the most reforms in its farmed seafood policy and in the labeling and transparency category.

Sustainable Seafood Policy: Aldi has publicly disclosed its seafood sourcing policy to the public, which applies to all of its seafood products in its fresh, frozen, and shelf-stable inventory. Aldi has continued to make strides in the aquaculture sourcing by moving to 2-star Best Aquaculture Practices (BAP) certification for most of its farmed seafood (97% of it), and is aiming to source a minimum of 100% 2-star BAP by the end of 2014. The company has also taken a public stand in refusing to purchase genetically-modified organisms should they become available on the U.S. market. Its wild-caught fisheries policy is also respectable, and meshes well with the fact that it sells few Red List species.

Seafood Sustainability Initiatives: Aldi continues to work closely with Sustainable Fisheries Partnership (SFP) and advocates for improvements within the context of certification organizations such as the Marine Stewardship Council (MSC) and Global Aquaculture Alliance (GAA). In addition, Aldi implements annual monitoring procedures to ensure that its suppliers conform to its policy requirements. Aldi could strengthen its commitment to traceable, sustainable seafood by requiring that seafood be traced back to the vessel that caught it, and by refusing to do business with known "pirate" fishing companies.

Labeling and Transparency: Aldi made rapid gains in this area by beefing up its in-store signage and online communication regarding seafood sustainability. At point-of-purchase, Aldi stepped up labeling sustainability information on its packaging and in the master cases. It labels all non-grocery seafood products with scientific name and gear type, and was the first U.S. grocer to introduce comprehensive Food and Agriculture Organization (FAO) catch area labeling on all fresh/frozen seafood products.

Red List Seafood Sales: This is Aldi's strongest category, and is second only to Trader Joe's in selling the fewest Red List species out of any retailer in this report. Aldi sells seven out of the twenty-two Red List species: Alaska Pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallop, ocean quahog, South Atlantic albacore tuna, and tropical shrimp. Its farmed salmon and shrimp is BAP 2-star certified.

Headquarters: Minneapolis, Minnesota

Store and Banners: 1,245 across the U.S. (that include expanded food assortments), operating as Target, SuperTarget, and CityTarget

Background: Target has built a successful "big box" store concept based on low prices and trendy products. Target's grocery division offers groceries, organic products, and household goods under one roof. In the 2013 fiscal year, consumables (food and pet supplies) accounted for \$14.7 billion, or 20 percent of total sales.

Greenpeace Comments: Target made almost negligible gains over the past year, though it dropped two spots in the rankings due to Hy-Vee and Aldi eclipsing the store. Nonetheless, if Target sticks to some of the goals it has set for itself over the coming years, the company could find itself climbing up the charts again.

Target has communicated that it is sticking to its pledge of selling only sustainable and traceable seafood by year-end 2015, which it generally defines as selling no species identified by the Monterey Bay Aquarium's Seafood Watch Program as "red," unless the given fisheries is in a fisheries improvement project (FIP) "on as clear, time bound and credible path to improvement." While Greenpeace is supportive of Target's efforts, it urges the company to lose no speed in hitting this goal, and to conduct due diligence on the efficacy of the specific FIPs before becoming fully engaged in them.

Sustainable Seafood Policy: Target's seafood policy covers fresh, frozen, and *some* shelf-stable items. Target still needs to reconcile its broader-applying policy to its problematic canned tuna inventory. While Target does offer its customers the option of the third-party brand Wild Planet pole-and-line caught canned tuna (a far more sustainable method of catching tuna than other more common and devastating methods, such as FAD-fishing), it still struggles to apply the policy across all of its canned tuna. Its private label (Market Pantry) carries canned tuna that is currently caught with FAD-associated purse seines, and it sells Bumble Bee and StarKist brands, also associated with this destructive method of fishing.

Target remains strong in its aquaculture policy, and is already on its way to strengthening its shrimp and tilapia products. Greenpeace applauds Target's continued strong stance against selling farmed Atlantic salmon, given the well-documented problems associated with that form of aquaculture.

Seafood Sustainability Initiatives: Target conducts annual assessments for all suppliers. The findings guide the retailer's decisions whether to explore alternative sourcing or engage in fishery improvement projects, and Target makes sure that suppliers are aware of improvements that need to be made to meet its requirements. Target partners with FishWise, a non-profit ocean conservation consultancy, and this appears to have yielded positive results for the company.

Labeling and Transparency: This is Target's worst category. Thankfully, Target made minor gains in this area by including sustainability information on a majority of Simply Balanced and Market Pantry products (i.e., private label brands). Creating a way to present more information at point-of-purchase (or on its website) could be a major step toward greater transparency; in other words, Target's "clean-store" policy of minimal signage does not preclude other ways of getting this information to consumers.

Red List Seafood Sales: Overall this is a relatively strong area for Target, and it moved in the right direction by dropping the sale of bigeye tuna. Target sells eight of the twenty-two Red Listed species: Alaska pollock, Atlantic cod, Atlantic sea scallops, ocean quahog, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna. It is one of the few retailers that does not sell farmed salmon.

#9 Ahold

OVERALL RATING 6.29



POLICY:	67.78	INITIATIVES:	65.36	TRANSPARENCY:	66.5	RED LIST:	52
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#10 Delhaize

OVERALL SCORE 6.11



POLICY:	74.48	INITIATIVES:	63.09	TRANSPARENCY:	48	RED LIST:	59
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Headquarters: Quincy, Massachusetts

Stores and Banners: 765 stores operating as Stop & Shop, Giant Foods, Martin's Food Markets, Peapod

Background: Ahold USA is a subsidiary of a Dutch retailer (Royal Ahold) based in Amsterdam, and accounts for about 54% of the parent company's total sales. Ahold USA supports four regional divisions that together operate 765 stores in several states and the District of Columbia, along with Peapod, an online grocery shopping/delivery service. With \$26.9 billion in FY 2013 sales, Ahold USA is the seventh largest food retailer in the United States.

Greenpeace Comments: Ahold USA has made overall progress in the last year, but dropped in the relative rankings due to newcomer Hy-Vee's remarkable grand entrance showing. It deserves praise for boldly stepping forward to urge the relevant management authority to protect the Bering Sea Canyons — a particularly critical area that is often called our nation's "fish basket." Unfortunately, its actions in the Southern Hemisphere — particularly its re-introduction of Chilean sea bass — dampens this otherwise good news. Historically, Ahold has been a leader in seafood sustainability, but other retailers have made speedier progress in recent years and surpassed the company. Nonetheless, Ahold USA's current seafood sustainability team is solid, and Greenpeace and the oceans are counting on them to recalibrate and go full steam ahead.

Sustainable Seafood Policy: While this is an overall strong area for Ahold, its policy still has not been fully-implemented across categories, in that the canned tuna sections contain numerous unsustainable options (such FAD-caught skipjack and conventionally longlined albacore tuna).

Ahold has improved its sustainable seafood policy in regard to aquaculture, sourcing 2-star "Best Aquaculture Practices" shrimp on its private label. The company gives preference to farmed seafood suppliers that are taking steps to reduce the environmental impacts of their operations as well as reduce the use of wild-caught fish for feed, antibiotics, and pesticides.

Last year, Greenpeace praised Ahold for reserving the right to "choose not to carry a species, even if it has a credible eco-label," if the company still had "serious concerns," and Ahold specifically cited Chilean sea bass "despite there being Marine Stewardship Council (MSC) certified sources." Unfortunately, now that Ahold USA has re-introduced Chilean sea bass, it appears that the company no longer exercises as much independent judgment in this area; it has simply deferred to the MSC on one of the most controversial certifications made by the organization.

Seafood Sustainability Initiatives: Greenpeace applauds Ahold USA for joining a growing number of retailers in publicly calling for the protection of the Bering Sea Canyons and writing a letter to the relevant management authority to that effect. Greenpeace also acknowledges Ahold's role in writing an industry-led letter earlier this year opposing the Pebble Mine development project in Alaska, as this demonstrates the concern of the company in potential impacts that the mine would have on fisheries.

Labeling and Transparency: Ahold has historically done well in its promotion of seafood sustainability to its customers, which it does on its website, and by highlighting sustainable seafood items in weekly circulars, in-store recipe cards, and signage. It has even begun providing its customers with information online on the type of aquaculture method used in its farmed products. Ahold should consider providing similar information to the consumer for its wild-caught product regarding fishing method.

Red List Seafood Sales: This is Ahold's worst category. Unfortunately, Ahold continues to sell thirteen out of twenty-two Red List seafood items at its stores: Chilean sea bass, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, monkfish, ocean quahog, red snapper, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

Ahold sells BAP 2-star certified shrimp and is actively engaged in a fishery improvement project on Indonesian snapper.

Headquarters: Salisbury, NC

Stores and Banners: Around 1,356 stores operating as Food Lion, Hannaford Bros., and Bottom Dollar Food

Background: Delhaize America is owned by the Belgian food retailer Delhaize Group. Its revenue was \$19 billion in the 2013 fiscal year. In the beginning of 2014, Delhaize sold 165 branches of its Sweetbay, Harveys, and Reid's banners to Bi-Lo holdings.

Greenpeace Comments: Delhaize bounced back from its meager improvement last year, and is now second only to Meijer on most improved retailer from last year. Its relative ranking dropped only because of newcomer Hy-Vee's fifth place showing. Delhaize made recent positive strides in the Red List category, but it should improve its transparency in regards to information provided to customers at point-of-purchase, and reform its canned tuna inventory.

Sustainable Seafood Policy: Delhaize's seafood policy applies to its fresh, frozen, and shelf-stable categories, and it deserves credit for taking a more in-depth look at this area. Greenpeace has pointed out to the company that the next step will be to bring the shelf-stable tuna category into greater compliance with the policy by offering customers affordable, sustainable options. To its credit, the company is interested in considering these alternatives.

Delhaize has a particularly robust aquaculture policy, and sources 100% Global Aquaculture Alliance (GAA) Best Aquaculture Practices (BAP) certified farmed seafood. While Greenpeace does not endorse the GAA due to numerous unresolved concerns, we do acknowledge the importance of improving regulation and traceability within this sector. Finally, the company has an internal policy against buying genetically modified salmon, which it revisits every year. Greenpeace acknowledges this first step, though encourages the company to take the next one by making the commitment (a) public, (b) applicable across all seafood, and (c) not subject to annual renewal.

Seafood Sustainability Initiatives: Delhaize has displayed far greater transparency this year than the previous one, and is an active participant in numerous fishery improvement projects for species such as tuna, blue crab, and snapper, to name a few. Greenpeace applauds Delhaize for relying on third parties to conduct random audits on whether suppliers conform to the company's policy requirements. An ideal next step in this realm would be for the company to more actively engage in the policy arena by communicating to regulatory managers and policy makers the need to improve fisheries management.

Labeling and Transparency: Delhaize continues to stall out in this area, as it has maintained its level of outreach from last year. For the second year in a row, it is still trying to figure out how to sufficiently label products and effectively communicate this to consumers; information such as catch methods, stock from which seafood was caught, scientific names, and aquaculture production methods. Since Delhaize has much of this information kept on file, it should be able to tackle this challenge with greater ease.

Red List Seafood Sales: Delhaize America improved its score by dropping a few species from last year. While it went the wrong direction by adding Atlantic halibut and Bigeye tuna, it also dropped grouper, monkfish, and ocean perch. Its Fishery Improvement Project (FIP) participation also mitigated its score for a few species, including yellowfin tuna. Delhaize America sells Atlantic halibut, Alaska Pollock, Atlantic cod, Atlantic sea scallop, Bigeye tuna, ocean quahog, red snapper, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

The company is actively engaged in FIPs with red snapper, bigeye tuna, and yellowfin tuna, among other species.

#11 Meijer

OVERALL SCORE **5.93**



POLICY: 69.88 INITIATIVES: 63.75 TRANSPARENCY: 43.5 RED LIST: 60



#12 Walmart

OVERALL SCORE **5.60**



POLICY: 67.23 INITIATIVES: 56.68 TRANSPARENCY: 33 RED LIST: 67



Headquarters: Grand Rapids, Michigan

Stores and banners: 204 stores operating as Meijer

Background: Meijer began as a small grocery shop in 1934 and has now expanded to over 200 stores in primarily the Midwest. Forbes ranked Meijer as America's 19th largest private company in 2013. Its revenue for the 2013 fiscal year was \$15 billion.

Greenpeace Comments: Meijer continues to impress by making substantive changes and takes the prize for the most improved retailer this year. Given that the retailer was in last place only a few years ago, this is an impressive accomplishment. Meijer's achievements include a more robust seafood policy (particularly with farmed seafood), more stringent requirements and improved oversight of its suppliers, and improvements in its Red List inventory. However, the company still finds itself just shy of the top ten.

Sustainable Seafood Policy: Meijer is actively engaged in site visits of its suppliers' facilities to evaluate their performance. It has made strides in its private label (store brand) frozen fish in regards to certification, and now requires that all farmed fish and crustaceans sold to Meijer are from Best Aquaculture Practices (BAP) 2-star certified suppliers.

While eco-certification groups can provide initial guidance, Greenpeace cautions Meijer in relying too heavily on its partners and certification groups given that numerous problems still exist with certifiers. Meijer should create its own precautionary and protective standards that are independent to those of the certifiers. For example, Greenpeace applauds Meijer for its proactive internal policy of refusing to sell genetically-modified seafood if it becomes available on the market.

Seafood Sustainability Initiatives: Meijer made progress in this area due to taking a more proactive look at its sourcing. For example, it now has annual monitoring procedures in place and relies on external parties to provide audits to ensure that the company's suppliers are conforming to Meijer's seafood policy requirements. Meijer could benefit from pushing forward to engage in more public support of ocean initiatives at large, in the policy arena. Taking the Ross Sea Pledge or a stand in favor of protecting the Bering Sea Canyons would be an excellent start.

Labeling and Transparency: This category still remains Meijer's weakest. However, Meijer now includes the Latin name of fish species on some of its products in an effort to reduce misunderstanding and clarify to consumers exactly what they are purchasing. The company will also be unveiling new packaging to consumers in July of this year to communicate BAP 2-star certification across its farmed seafood products. It could do better in labeling its wild-caught products for consumers by moving beyond only providing a Marine Stewardship Council (MSC) label.

Red List Seafood Sales: Meijer improved in this category by dropping the sale of one species and improving the sourcing behind a few of its species. It sells 12 red list species: Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, bigeye tuna, ocean quahog, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

Meijer is involved in a fishery improvement project (FIP) with Pierfish for 100% of its redfish (ocean perch). Also of note, it has made efforts to reduce turtle bycatch in its FIP for Ecuadorian mahi-mahi. Meijer is also in the process of joining more FIPs, but currently does not source from them at this time.

Headquarters: Bentonville, AR

Stores and banners: 3,265 Walmart Supercenters, 322 Neighborhood Markets, and 630 Sam's Clubs in the U.S.

Background: Walmart has over 4,786 stores in the U.S., and U.S. sales (excluding Sam's Club) accounts for 55% of the company's total sales worldwide. Its U.S. and Canadian sales in the 2013 fiscal year were \$374.4 billion.

Greenpeace Comments: Walmart made steady progress over the past year, though it dropped in relative rankings due to more swiftly performing competitors. Walmart is the largest retailer in the U.S., and as such, a uniquely important force.

In May of last year, Walmart introduced its Fish Aggregating Device (FAD)-free tuna nationwide under the brand "Ocean Naturals skipjack chunk light tuna," and informed customers, on the label, that it is responsibly caught without the use of devastating FADs. Walmart's other key improvements lie in the Red List area.

Sustainable Seafood Policy: The retailer's sustainable seafood policy covers fresh and frozen seafood, but it has a separate policy that addresses shelf-stable tuna, particularly its FAD-free tuna released last year. Offering these responsibly-caught alternatives at such a grand scale sends a positive and powerful message throughout the seafood sourcing industry. Approximately 98% of its fresh and frozen seafood is addressed by its policy.

The retailer's wild-caught policy is still weak, and Walmart has recently been involved in industry in-fighting over sustainability label use: Marine Stewardship Council (MSC) vs. the Alaska Seafood Marketing Institute (ASMI) certification for its wild-caught seafood. Greenpeace is less concerned over which certifier receives Walmart's blessing, and more concerned over actual change on the water. In the aquaculture arena, Walmart's farmed shrimp offering is Best Aquaculture Practices certified. Walmart does not source from aquaculture operations that use fish feed known to contain ingredients from forage fisheries graded "Red" by Greenpeace.

Seafood Sustainability Initiatives: Walmart continues to support the Conservation Alliance for Seafood Solutions and its "Common Vision for Environmentally Sustainable Seafood," which aims to build an active partnership between conservation organizations and seafood retailers in support of achieving sustainable fisheries. However, Walmart has still failed to commit to chain-of-custody traceability or to avoiding Illegal, Unreported and Unregulated (IUU) seafood products. It has neither taken proactive stances internally, nor delved into the political arena by supporting active legislation on these very issues. Given the size of the retailer, this is problematic.

Walmart obligates suppliers in all *new* contracts to only deliver seafood according to the retailer's policy. Furthermore, it has taken the initiative to reach out to fisheries managers and government officials in the U.S. and other countries to focus their attention on better fishery-and-aquaculture improvement projects. Finally, the company sourcing Walmart's Ocean Naturals FAD-free tuna provides full traceability to the vessel that caught the skipjack tuna. Unfortunately, this product is available at most—but not all—Walmart locations nationwide.

Labeling and Transparency: Walmart performed poorly in this category. Overall, it provides insufficient information to consumers to allow them to make sustainable choices. While there are some instances where the company does provide such information (for example, explaining the merits of pole-caught tuna offered by Sustainable Seas)—this is largely relegated to the *online* store, instead of in-store signage or labeling at point-of-sale. One notable exception is the new FAD-free tuna product that provides information to the consumer on how the fish was caught.

Red List Seafood Sales: In contrast to the previous section, over the past year Walmart took positive steps here by dropping redfish and making improvements in how it sources Atlantic cod and yellowfin tuna. The retailer sells nine of the twenty-two red listed seafood species: Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, bigeye tuna, ocean quahog, South Atlantic albacore tuna, tropical shrimp, and yellowfin tuna.

#13 H-E-B

OVERALL SCORE 5.58



POLICY:	60.81	INITIATIVES:	58.77	TRANSPARENCY:	48.5	RED LIST:	55
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#14 Price Chopper

OVERALL SCORE 5.52



POLICY:	64.22	INITIATIVES:	52.5	TRANSPARENCY:	50	RED LIST:	55
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Headquarters: San Antonio, TX

Stores and Banners: 305 stores in the U.S. operating as H-E-B, H-E-B *plus!* and Central Market

Background: H-E-B is a privately held San Antonio, Texas, USA-based supermarket chain with 305 stores throughout Texas. H-E-B ranked number twelve on Forbes's 2012 list of "America's Largest Private Companies." Its annual revenue in the 2013 fiscal year was approximately \$19.4 billion. H-E-B operates Central Market as its upscale organic and fine foods store.

Greenpeace Comments: H-E-B has made mild gains since its last survey and rose in the rankings. H-E-B's policy is its strongest area, and its weakest is transparency. The company is involved in external efforts to improve fisheries, but could improve by providing more guidance to its customers and cleaning up its canned tuna and red list inventory.

Sustainable Seafood Policy: H-E-B's seafood policy, available on its website, demonstrates that its strength is in the area of aquaculture. H-E-B's policy ostensibly covers canned goods; however, the company continues to sell unsustainable items in the forms of processed clam chowders and canned tuna. Greenpeace commends H-E-B for its continued firm stance on refusing to sell GMO seafood should it become available on the marketplace.

Seafood Sustainability Initiatives: H-E-B sits on the Food Marketing Institute (FMI) sustainable seafood committee. Earlier this year, FMI submitted a letter to the EPA in support of an environmental study of Bristol Bay, Alaska, in response to the proposed Pebble Mine that would have deleterious impacts on local salmon populations.

H-E-B refuses to purchase seafood that cannot be traced back to the vessel that caught it, and has annual monitoring procedures in place to ensure that its suppliers conform to its policy requirements. It also relies on an external third party, Trace Register, to ensure that its suppliers are conforming to its policy.

Labeling and Transparency: Greenpeace commends H-E-B for informing consumers that it no longer carries orange roughy due to sustainability concerns.

Apart from the Gulf Wild red snapper program, H-E-B is lagging behind on communicating key information to consumers on site to better assist them in their decisions. H-E-B employs bilingual employees at its two *Mi Tienda* stores in Texas, placing the company in a position to ideally champion seafood sustainability to its Spanish-speaking consumer base. However, comprehensive in-store seafood sustainability materials is lacking in both English and Spanish. It is primarily due to poor point-of-purchase information that this is H-E-B's worst category.

Red List Seafood Sales: H-E-B sells Chilean sea bass, which does not belong in any grocery store. The retailer sells thirteen Red List species: Chilean sea bass, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, grouper, ocean quahog, red snapper, South Atlantic albacore tuna, swordfish (though sometimes sustainably-caught), tropical shrimp, and yellowfin tuna.

Headquarters: Schenectady, New York

Stores and banners: 132 stores operating as Price Chopper

Background: Price Chopper is a privately held corporation run by the Golub Corporation and Golub family. The chain's footprint extends beyond New York and Massachusetts into Vermont, Connecticut, Pennsylvania, and New Hampshire. Over 50% of the company's privately held stock is employee-owned. It has about \$3.5 billion in annual sales.

Greenpeace Comments: Price Chopper made progress in most areas over the last year but ended up shedding a few hundredths of a point for, primarily, a lack of in-store signage and displays pertaining directly to seafood sustainability. They previously received credit for this last year. Nonetheless, given its improvement in its policy and Red List inventory, it would appear that the company is on track to be more competitive over the next year and can potentially reclaim its drop in relative rankings due to the performance of swifter competitors.

The company should review its canned tuna products and devise ways to move away from destructively-fished products such as fish aggregating device (FAD)-caught skipjack tuna. Price Chopper still sells the top-tier Red List species of hoki; the company must discontinue this item without delay. After all, Price Chopper phased out the sale of another top-tier species (orange roughy) about two years ago.

Sustainable Seafood Policy: This remains Price Chopper's strongest category. All farmed shrimp is Best Aquaculture Practices (BAP) certified, and the company is moving into improving its sourcing criteria for farmed salmon. While it does not currently have plans to sell GM salmon due to its current standards, it could put consumers at ease by making a public statement to that effect. Price Chopper could improve its policy by incorporating shelf-stable seafood and tightening its wild-caught seafood sourcing standards.

Seafood Sustainability Initiatives: Price Chopper takes traceability seriously and relies on a DNA testing service to randomly test samples from fifteen of its frozen fish product lines. The company says it has not found any improper substitution so far, and will continue sampling. Greenpeace recommends that Price Chopper build upon this positive momentum of verifying the correct species by also ensuring that its suppliers do not provide seafood from illegal, unregulated, or unreported (IUU) fishing operations, and to ensure full traceability back to the vessel that caught the fish.

To build further momentum, Price Chopper could work on increasing its public support for key political initiatives, such as supporting the creation of marine reserves in ecologically-sensitive areas, bycatch limits, and improved regulations to keep IUU seafood out of U.S. markets.

Labeling and Transparency: Price Chopper lost some ground in this area over the last year because of a lack of in-store information such as flyers or signage to educate and engage consumers over seafood sustainability. Price Chopper is providing some information regarding some of its products concerning the scientific name, the region where the fish was caught, and the fishing method or gear type used. This builds upon its previous partial implementation of providing consumers information on certain products' catch vessel and day of catch. It does also send occasional emails to customers providing information on seafood traceability to consumers.

If Price Chopper were to translate its progress in preventing the mislabeling of seafood to the area of sustainability, by, for example, informing consumers of the sustainability status of various species (i.e., red/yellow/green), then it could substantially bolster its performance in this category.

Red List Seafood Sales:

The company sells twelve Red List species: hoki, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, ocean quahog, red snapper, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

Price Chopper sources yellowfin tuna from pole-and-line fisheries only, which is a more sustainable form of fishing than other conventional methods.

#15 Costco

OVERALL SCORE **5.35**



Headquarters: Issaquah, WA

Stores and Banners: 454 in the U.S., operating as Costco

Background: Costco is the third largest retailer in the U.S., and the largest membership warehouse club chain in the U.S. Its annual revenue for the 2013 fiscal year was \$65.16 billion nationwide.

Greenpeace Comments: Costco improved almost negligibly over the past year, adding additional information on its in-store packaging and tweaking its Red List category ever so slightly. Likely due to its warehouse approach to sales, it offers fewer species than most other retailers, and by extension, sells fewer Red List species. It performed poorly in the labeling and transparency category. With direct competitor Walmart and other traditional grocery stores already selling affordable and sustainable canned tuna, Costco needs to provide a sustainable alternative—and fast.

Sustainable Seafood Policy: In August 2012, Costco issued a Seafood Sustainability document encompassing its fresh, frozen, and shelf-stable seafood items. It appears to be interested in improving its farmed seafood offering; Costco remains committed to pursuing the ongoing Aquaculture Stewardship Council (ASC) standard development process.

Seafood Sustainability Initiatives: Costco has withdrawn its membership in the Global Partnership for the Oceans, which is a growing alliance of over 100 governments, international organizations including the World Bank Group, civil society groups, and private sector interests that are working to mobilize knowledge and financial resources to address threats to ocean health, resilience, and productivity. While it remains to be seen how exactly this coalition will address these issues, one of their goals is to create more marine reserves. Nevertheless, Costco is no longer a part of it.

Costco continues to partner with the International Sustainable Seafood Foundation (ISSF) in regards to its tuna products. Unfortunately, ISSF has recently been plagued with several scandals, including allegations that some of its top members regularly engage in illegal, unreported, and unregulated (IUU) fishing. Greenpeace hopes that Costco can either play a role of reform within the ISSF body, or move to truly sustainable tuna by sourcing from suppliers who are not members because their standards are more protective of the environment than those of ISSF.

Labeling and Transparency: Costco performed poorly in this category. It needs to be more transparent in general and provide more in-store information to customers. To its credit, it did make an effort to better inform its consumers by occasionally including the Latin name of species on the label to fight fish fraud, and by sometimes including labels indicating the fishing method used.

Red List Seafood Sales: Costco sells eight Red List items: Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallop, Bigeye tuna, South Atlantic albacore tuna, tropical shrimp, and yellowfin tuna.

Costco participates in the shrimp and salmon aquaculture dialogues that are part of its involvement in the Aquaculture Stewardship Council's standard development process.

#16 Giant Eagle

OVERALL SCORE **5.20**



Headquarters: Pittsburgh, PA

Stores and Banners: 231 supermarkets operating as Giant Eagle, Market District, and Good Cents

Background: For the 2013 fiscal year, Giant Eagle had annual sales of approximately \$9.9 billion. One of the largest privately owned and family-operated companies in the nation, Giant Eagle is ranked number 33 on Forbes Magazine's list of the top U.S. private companies in 2013 based on annual revenue.

Greenpeace Comments: Giant Eagle made slight gains from last year, raising its score by two-hundredths of a point and dropping a spot in the relative rankings. It has effectively stalled out.

There are a few key reforms that Giant Eagle could implement to be a better steward of the ocean. First, it must discontinue the sale of orange roughy and Chilean sea bass, both Red List species of particular significance for the critical role that they play in marine ecosystems. Second, it must develop stronger internal standards on wild-caught seafood sourcing, and apply this policy across the board in seafood throughout all departments, including shelf-stable seafood. The company should realize that other items it sells are inconsistent with protecting our oceans. Finally, it needs to more effectively communicate sustainability information to consumers at point-of-sale to better enable them to make more informed decisions. Fortunately, it has made some headway in this regard over the past year.

Sustainable Seafood Policy: Giant Eagle's sustainable seafood policy applies to all of its wild-caught and farmed seafood, fresh and frozen, in the seafood department though there are several suspect items. Unfortunately, the policy does not apply to shelf-stable items or other seafood products that may be located outside the seafood department.

Giant Eagle is taking steps to improve its aquaculture policy by supporting Global Aquaculture Alliance (GAA)/Best Aquaculture Practices (BAP) certification, and it sources some of its salmon, shrimp, and tilapia from certified farms. While Greenpeace does not endorse the GAA due to numerous unresolved concerns, we do acknowledge the importance of improving regulation and traceability within this sector. Giant Eagle has an internal policy of not sourcing genetically-modified salmon or tilapia, should they become available. However, its policy does not extend to all genetically-modified seafood.

Apart from general transparency criteria covered below and requirements outlined in specific Fishery Improvement Projects (FIPs), Giant Eagle has no sustainability criteria for its wild-captured seafood.

Seafood Sustainability Initiatives: Giant Eagle does partner with other organizations to work on seafood sustainability, but it is unclear whether these partnerships have resulted in positive change. For example, Giant Eagle is a member of the Food Marketing Institute's Sustainability Task Force and Sustainable Seafood Working Group, and has recently engaged with the Ecology Action Centre (EAC) regarding the NGO's work on community supported fisheries.

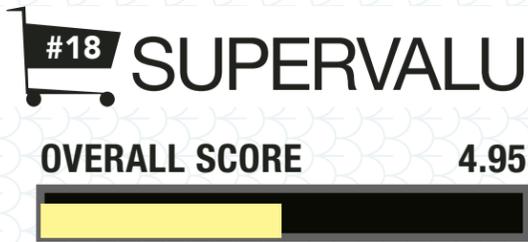
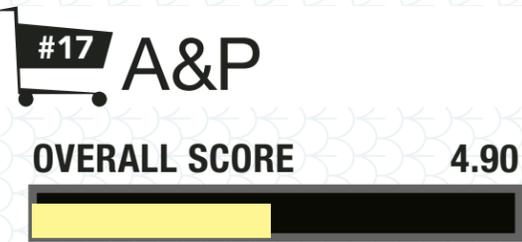
To its credit, Giant Eagle ensures that its contracts require suppliers to deliver seafood according to its policy. This includes annual monitoring reports by external parties to ensure compliance.

Labeling and Transparency: Giant Eagle's website provides its customers with some information on sustainable seafood through its Sustainable Seafood Statement. The company also provides in-store materials on its seafood operations, including point-of-sale signage detailing stock and fishing methods for wild products. This year, Giant Eagle indicated that for certain events and promotions, it would be telling the story of seafood to their customers in a little more detail. Those communications will include information regarding catch vessel and day of catch for wild product, or the farm in which seafood was cultivated, and whether the farmed species is domestic or introduced. Ideally, Giant Eagle can make labeling more consistent across categories; nonetheless, it should be congratulated for its improvement in this area.

Giant Eagle partners with groups such as the Sustainable Fisheries Partnership and is exploring ways to reduce bycatch among its Gulf of Mexico wild-caught shrimp suppliers. But while Giant Eagle indicated that it is involved fishery improvement projects for both Gulf of Mexico Reef Fish (such as red snapper and grouper) and Gulf of Mexico wild shrimp landed in Texas, it did not indicate whether it actually sourced any of its seafood from these fisheries.

Red List Seafood Sales: Unfortunately, Giant Eagle still carries 15 Red List species, an incredibly high number, and it stubbornly holds on to two of the most unsustainable seafood products available, orange roughy and Chilean sea bass. This year, it even added Atlantic halibut to the list. In addition, it sells Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, monkfish, ocean quahog, red snapper, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

In the future, Giant Eagle might begin to source from fishery improvement projects in the Gulf of Mexico. If it provides more information on these FIPs and others it could improve its performance in future years.



Headquarters: Montvale, NJ

Stores and Banners: 305 stores operating as A&P, Food Basics, The Food Emporium, Pathmark, Super Fresh, and Waldbaum's

Background: Founded in 1859, A&P mainly operates in the mid-Atlantic and southern New England. The company appears to be struggling financially with its annual sales revenue having dropped from last year's \$6.4 billion to \$5.9 billion, as well as recent store closures.

Greenpeace comments: Likely due to staff turnover and the financial crunch, A&P did not participate this year in the annual *Carting Away the Oceans* survey process. However, conversations in late 2013 with the company give the impression that previous internal plans regarding seafood sustainability have been placed on hold. To that end, A&P's performance this year is similar to last year. Due to the layoffs of relevant staff that likely contributed towards stalling out, the company dropped another couple of spots in the rankings.

A&P lost most of its points because an in-store visit to a Pathmark store did not yield any signage or brochures related to seafood sustainability, as the company had previously indicated. Greenpeace strongly encourages A&P to increase its participation in industry and NGO-led conservation initiatives. It could also score big wins by taking "low-hanging fruit" steps in the area of transparency and Red List species; the sale of two new Red List species is unacceptable. This is no longer as strong of an area for the company as it was last year.

Sustainable Seafood Policy: A&P still struggles to make its mission statement into a more formal sustainable seafood policy. The mission statement contained a pledge to refrain from selling 19 red listed species *until they are deemed sustainable*, but the pledge was ignored when A&P introduced two new unsustainable items a year ago to their offering—Atlantic cod and redfish. While the internal mission statement now supposedly applies to its shelf stable seafood in addition to fresh and frozen, only about half of the seafood across all departments is covered in the first place. This leads to confusion. To its credit the store does sell third-party sustainable canned tuna but does little else in this category.

A&P should develop specific benchmarks within its policy for both wild capture fisheries and aquaculture, meet its own internal standards, and make the policy available to the general public.

Seafood Sustainability Initiatives: A&P already refuses to purchase seafood from vessels on the Greenpeace blacklist (pirated fish), but is still lagging behind by failing to demonstrate any real progress on requiring its seafood suppliers to participate in any industry improvements or live up to A&P's mission statement. One exception is that the company has partially implemented supplier requirements in the fresh seafood category that trace the seafood back to the vessel that caught it. A&P has pointed out that it is looking into ways to establish annual monitoring procedures for its suppliers and relying on an external party to audit for compliance, however, it appears that this plan has yet to be implemented. It has been several years since A&P stepped into the political arena regarding the promotion of ocean conservation initiatives.

Labeling and Transparency: A&P performed poorly in this section. The company had previously claimed that it provides information on seafood sustainability to its customers via in-store signage or flyers and on its website. However, an in-store visit to a Pathmark did not yield anything to that effect. Furthermore, its online seafood-related information actually has nothing to do with sustainability. A&P does not provide additional information on the package for the consumer to make more informed decisions.

Red List Sales: A&P has maintained its sale of Atlantic cod, redfish (a.k.a. ocean perch), Alaska pollock, Atlantic salmon, Atlantic sea scallops, ocean quahog, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna. Due to clarification on internal sourcing practices, it lost mitigation points in the area of redfish.

Headquarters: Minneapolis, MN

Stores and Banners: SUPERVALU has 1,525 stores including 377 corporate Save-A-Lot stores and 191 conventional supermarkets under the following banners: Farm Fresh, Hornbacher's, Shop 'n Save, and Shoppers. SUPERVALU also licenses an additional 957 Save-A-Lot locations. Albertsons was purchased by Cerberus Capital in 2013, and is profiled separately in the report.

Background: SUPERVALU just recently halved its capacity by selling off Albertsons and several related banners, amounting to 877 stores total, with sales of approximately \$17.4 billion. It brought in about \$15.9 billion in annual revenue in the 2013 fiscal year.

Greenpeace Comments: The future looks unclear for SUPERVALU. Industry press has referred to SUPERVALU going its own way as returning to its "wholesaler" focus. Despite this massive change in internal structure, SUPERVALU did take the time to respond to the retailer survey. This allowed Greenpeace to more accurately reflect internal company initiatives and credit the company for its efforts.

SUPERVALU improved slightly over the past year, but has a long way to go before it becomes a formidable force in the seafood sustainability movement. It is currently falling behind in its labeling and transparency category.

Sustainable Seafood Policy: Overall, this is SUPERVALU's strongest category. The company is taking sustainability issues seriously, but it remains to be seen whether its policy and direction is sufficiently comprehensive in scope or if the company is moving fast enough.

SUPERVALU's policy currently applies to 75-100% of the seafood that it sells across all categories, including fresh and frozen seafood, and its private-brand canned tuna. It has committed to sourcing its top 20 wild-caught seafood products from fisheries that are Marine Stewardship Council (MSC)-certified, in MSC full assessment, or in World Wildlife Fund (WWF) fishery improvement projects and certification programs with equal or greater standards by 2015. It is unclear whether "top 20" is measured by tonnage or sales. Greenpeace does not currently endorse MSC certification due to its numerous unresolved issues, but does acknowledge SUPERVALU's efforts to clean up its wild-caught sourcing. SUPERVALU has a moderately protective farmed seafood policy as well; its farmed seafood ranges from 1-star to 2-star Best Aquaculture Practices (BAP) certification.

Seafood Sustainability Initiatives: Last year SUPERVALU took a stand by writing a letter to the relevant fishery management council calling for protection of the Bering Sea Canyons. SUPERVALU requires that its suppliers live up to its internal policy requirements and that they are subject to an annual evaluation to ensure compliance. It also trains suppliers on its policy requirements and advocates for their participation in industry improvements. The next logical steps for SUPERVALU in this area are to ensure that there is full traceability of seafood back to the vessel that caught it and to step up safeguards to ensure that it is not inadvertently purchasing pirated seafood.

Labeling and Transparency: This remains SUPERVALU's worst category. Last year, it promised to include website and in-store flyers and signage by the end of its fiscal year, which was the end of February 2014. Unfortunately, SUPERVALU has not met this deadline. The company did publicly announce plans to discontinue certain Red List items along with its reasons for doing so, which is one of the few positive element in this category.

SUPERVALU does a poor job of providing customers point-of-purchase information to assist them in making sustainable seafood choices while shopping. Greenpeace urges the company to provide *any* information, such as the sustainability status, fishing method, or farm from which seafood was cultivated to aid consumers in navigating the seafood department.

Red List Seafood Sales: SUPERVALU made some changes in this category. It dropped the sale of Greenland halibut but reintroduced imported grouper. The company sells 14 of the 22 Red List species: Atlantic halibut, Chilean sea bass, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallop, imported grouper, ocean quahog, red snapper, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

All of its farmed tropical shrimp is BAP 2-star certified, and its previous yellowfin tuna Fisheries Improvement Project (FIP) is now on hold due to SUPERVALU's internal restructuring. Perhaps the following year it will begin to source again from the FIP.

#19 Wakefern

OVERALL SCORE 4.74



POLICY: 51.4 INITIATIVES: 53.09 TRANSPARENCY: 46 RED LIST: 39



#20 Albertsons

OVERALL SCORE 4.73



POLICY: 48.68 INITIATIVES: 45 TRANSPARENCY: 36.5 RED LIST: 59



Headquarters: Keasbey, NJ

Stores and Banners: 85 stores owned outright under PriceRite and ShopRite banners, as well as supplier for hundreds more, including additional ShopRite stores, Fresh Grocer, Village Super Market, and Inserra Supermarkets

Background: Wakefern is the largest supermarket retailers' cooperative in the U.S. It primarily supplies its 48 co-op members' 250 ShopRite stores in the Northeastern U.S. and owns a handful of the stores outright. ShopRite boasts \$13.8 billion in retail annual sales. Given the co-op structure of ShopRite, individual stores make their own purchasing decisions. However, in virtually all cases ShopRite stores carry seafood that is directly sourced through Wakefern. PriceRite is a wholly owned subsidiary of Wakefern and its 50 stores target price-conscious shoppers in CT, MA, NY, PA, MD, and RI.

Greenpeace Comments: Wakefern was one of the five newcomers included in this year's report and as such its performance should be seen as a baseline score. It was one of the two newcomers that participated with Greenpeace by filling out the retailer survey. By being open to an external analysis of its seafood sustainability, it will be well-equipped to take stock and determine next steps forward.

Sustainable Seafood Policy: Wakefern's sustainable seafood policy applies to fresh and frozen products. Its private label tuna is supplied by Chicken of the Sea, which means that Wakefern has the opportunity to promote responsible sourcing in this area by refusing to buy destructively-caught tuna. Chicken of the Sea has been known to source more responsibly when pressured (see Trader Joe's).

Wakefern's sustainable seafood policy provides modest standards for wild-caught and farmed product, and could use some revisiting. Wakefern's stated reliance on the government to manage fisheries is the same as doing nothing; indeed, we all rely on the government to manage fisheries. Whether as part of the retail industry Wakefern chooses to proactively protect the oceans in its sourcing of seafood, and take steps towards that end, is a far different manner. Nonetheless, while there is room for improvement, Wakefern's policy score reflects a decent entrance into the rankings, especially for a newcomer.

Seafood Sustainability Initiatives: Wakefern has sustainability requirements that its suppliers must live up to and has external parties verify that the suppliers are conforming to Wakefern's policy on an annual basis. It also trains suppliers to inform them of its requirements. Wakefern's MSC Chain of Custody (see next section) may also de facto alleviate some other traceability concerns with supplier sourcing, at least in certain wild-caught fisheries. The company partners with many groups to work on seafood sustainability and via its role as a member of the Food Marketing Institute (FMI) it has endorsed a letter in opposition to the Pebble Mine in Alaska, which would harm local fish populations among other negative impacts. Wakefern should consider stepping up its activism in the policy arena.

Labeling and Transparency: Wakefern obtained MSC Chain of Custody certification (not to be confused with MSC species certification) at its seafood processing facility, which is a robust traceability program that monitors product through the supply chain. Wakefern has public-facing information online regarding seafood sustainability and education. Unfortunately it is falling behind when it comes to informing customers about seafood sustainability at the point of purchase, particularly when it comes to labeling.

Red List Seafood Sales: Wakefern performed poorly in this category because of the sheer number of Red List species it carries. The good news in this area is that the company has begun to source less damaging products from *some* of its suppliers of tuna and shrimp, for example. Wakefern should immediately phase out the sale of Atlantic halibut, Chilean sea bass, skates, and rays.

Wakefern sells 16 of the 22 Red List species, including Atlantic halibut, Chilean sea bass, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallop, bigeye tuna, Greenland halibut, ocean quahog, red snapper, redfish, skates and rays, South Atlantic albacore tuna, swordfish, tropical shrimp and yellowfin tuna.

Headquarters: Boise, ID

Stores and Banners: 1,077 stores operating as Albertsons, Jewel-Osco, Shaw's/Star Market, Acme, United, Market Street, and Amigos.

Background: Last year, Albertsons was owned by SUPERVALU and so was profiled as part of SUPERVALU in the *Carting Away the Oceans* report. In early 2013 Albertsons acquired a whopping 877 stores from SUPERVALU and is in the process of acquiring additional stores and operating them under the banners listed above. This means Albertsons has now ballooned into one of the top ten largest grocers in the U.S. (based on revenue), while SUPERVALU's overall sales have decreased. Its 2013 fiscal year annual revenue was \$23 billion. This year, the parent company of Albertsons (Cerberus Capital) purchased Safeway and may merge the two companies together.

Greenpeace Comments: Albertsons did not participate in this year's survey so most of the information is gleaned from three major sources: previous performance when it was housed under SUPERVALU, online information and store visits by Greenpeace staff.

Sustainable Seafood Policy: Albertsons seafood policy does not cover shelf-stable products, only fresh and frozen. Given that the company's seafood sustainability language posted online is devoid of tangible commitments, Greenpeace estimates that sustainability factors in its policy cover a little over half of the seafood sold. It is unclear whether its wild-caught seafood or farmed seafood are covered by a comprehensive certification regime, although some of the company's products are partially covered.

Seafood Sustainability Initiatives: Greenpeace estimates that Albertsons has a minimal degree of sustainability criteria that suppliers must follow but there is no public-facing information demonstrating third-party audits or more proactive efforts to ensure sustainable sourcing. Albertsons does not support improvements in fisheries management in the regulatory or policy arena, though it appears to occasionally collaborate with groups in other forums.

Labeling and Transparency: There appears to be little consistency across Albertsons banner stores when it comes to communicating to consumers about sustainability, both online and at the point of purchase. In most cases there is little or no information. In at least one case, products were confusingly labeled so that consumers were unable to determine the species (such as with fresh and frozen tuna).

Red List Seafood Sales: Albertsons sells eleven Red List species: Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallop, bigeye tuna, ocean quahog, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

#21 Kroger

OVERALL SCORE 4.61



POLICY: 59.33 INITIATIVES: 58 TRANSPARENCY: 44 RED LIST: 23



#22 WinCo

OVERALL SCORE 4.2



POLICY: 56.81 INITIATIVES: 30 TRANSPARENCY: 13 RED LIST: 68



Headquarters: Cincinnati, Ohio

Stores and Banners: 2,418 stores operating as Kroger, Harris Teeter, Dillons, Fred Meyer, Fry's, QFC, Ralphs, Smith's, Baker's, City Market, Food4Less, Foods Co., Gerbes, Jay C Food Stores, King Soopers, Owen's, and Pay Less

Background: Kroger operates 2,418 supermarket and multi-department stores in 34 states across the U.S. under a multitude of banners. Kroger is the nation's largest conventional grocery retailer. It had sales of over \$98 billion in the 2013 fiscal year (not including Harris Teeter). As of February 2014 Harris Teeter was officially acquired by Kroger and the companies will be profiled together next year.

Greenpeace Comments: Second only to Walmart in annual revenue, Kroger is the largest traditional grocery store chain in the U.S. As such, Kroger bears an enormous responsibility in sourcing sustainably, given its sheer size and tonnage of seafood sold. In spite of this, Kroger communicated to Greenpeace that it had no plans to participate in the survey this year or next year, leaving the impression that it does not take its purported commitment to sustainable seafood seriously.

Kroger made little progress over the past year, falling another three slots in the ranking to 21st place as other companies make progress. Kroger's ongoing partnership with the World Wildlife Fund (WWF) has led to a broad long-term commitment to the Marine Stewardship Council (MSC) but there appears to be minimal improvement based on these partnerships alone. Kroger has also explored how to move towards a more comprehensive adoption of Global Aquaculture Alliance (GAA) aquaculture standards.

Kroger is the worst performing retailer in the Red List category, selling 18 of the 22 Red List species.

Sustainable Seafood Policy: The retailer's slight improvement over the past year is due to action taken in response to consumer pressure regarding its stance on genetically modified seafood. It publicly stated to the NGO Friends of the Earth "Should genetically engineered salmon be approved, Kroger has no intention of sourcing it." Kroger has also tightened its aquaculture standards as mentioned in the initiatives section below. On the other hand, Kroger actually has a regressive tuna policy for its canned tuna. The policy actually prevents Kroger from offering readily available and price comparable tuna products that boast safer methods of capture, such as FAD-free or pole-and-line methods.

In its 2013 Sustainability Report, Kroger boasts that 68% of its top 20 wild caught, fresh and frozen species are either Marine Stewardship Council (MSC) certified or in MSC full assessment (with an end goal of 100%). Yet consumers are given little

information about how this is actually implemented, how Kroger determines what consists of its "top" species, or how much of it is actually certified as opposed to "in assessment." To reach its own goal of 100% by 2015, Kroger has a long way to go.

Seafood Sustainability Initiatives: Kroger has taken the initiative to make sure that all its corporate-branded farmed species are Best Aquaculture Practices (BAP) 2-star certified and that it at least has BAP 1-star certified farmed product from all of its major suppliers. The company also has sustainability requirements (outside of its policy) by which its aquaculture suppliers must abide. While Kroger has several sustainability partners, it appears that Kroger views these partners as more of an outward symbol of purported progress than as experts on how to implement genuine improvements to its sustainability standards and practices.

Kroger has mentioned its support for research programs and fishery improvement projects regarding yellowfin tuna and mahi mahi but Greenpeace was provided with no information regarding those projects.

Labeling and Transparency: Kroger provides no information to consumers to assist them in making sustainable seafood choices beyond what is otherwise required by law. There is also a lack of transparency within the retailer's chain of custody. While Kroger now offers some information on seafood sustainability on its website, its in-store presence was weak during a Greenpeace store visit, consisting only of a small brochure on "Sustainable Seafood." While Kroger receives credit for its in-store signage, this is far from what is to be expected of a retailer that claims in that brochure to be "fully committed to seafood sustainability." Indeed nothing in the brochure steers consumers towards or away from certain species but rather informs consumers that they can "feel good about purchasing seafood from the Kroger Company."

Red List Seafood Sales: For the third year in a row, Kroger is the worst performer in the Red List category when compared to all the other retailers profiled. The company's claim of promoting seafood sustainability cannot be taken seriously until it deals with the glaring problem posed by its Red List inventory.

Our latest data indicates that Kroger sells 18 out of the 22 Red List seafoods: Alaska pollock, Atlantic halibut, Atlantic salmon, Atlantic sea scallops, Chilean sea bass, Greenland halibut, grouper, hoki, monkfish, ocean quahog, orange roughy, red snapper, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

Furthermore, 4 of the 18 species it sells are top-tier Red List species, meaning the most threatened. In addition, it is troubling that Kroger sells parrotfish. Fragile coral reef ecosystems depend upon parrotfish to help keep algae from overgrowing corals.

Headquarters: Boise, ID

Stores and Banners: 94 retail stores operating as Winco

Background: WinCo Foods Inc. is a privately-held, majority employee-owned supermarket chain with stores in AZ, CA, ID, NV, OR, UT, and WA. In early 2014 it opened three new stores in Texas. Its name stands for "Winning Company" and it posted a 2013 annual revenue of \$5.7 billion. WinCo stresses low cost by purchasing directly from suppliers, not accepting credit cards, and not providing bagging service.

Greenpeace Comments: WinCo is one of the five new retailers profiled in this year's report and as such its performance should be viewed through the lens of a baseline score. It did not participate in the survey, so all information was gleaned through external means. WinCo achieved a passing score by two-tenths of a point and has a lot of work to do. Greenpeace would advise WinCo to use its strong vertical integration to its advantage when addressing seafood sustainability.

Sustainable Seafood Policy: WinCo has an internal sustainable seafood policy that does not address its canned tuna inventory. WinCo has an internal policy against selling genetically modified seafood and is looking to improve its sourcing of farmed shrimp.

Seafood Sustainability Initiatives: WinCo's opportunity lies in its vertical integration. Given the model of direct purchasing from suppliers, it has a strong internal chain of custody in the fresh seafood section. Its canned tuna section, filled with destructive national brands, is another matter. WinCo does not publicly participate in any seafood sustainability efforts and did not communicate to Greenpeace whether it advocates behind the scenes for reforms.

Labeling and Transparency: This is WinCo's weakest category. A major factor in such a low transparency score was WinCo's refusal to participate, and therefore Greenpeace was unable to take into account information that could not be obtained through external means. While WinCo does not have in-store signage, it has begun to issue in-store flyers related to seafood sustainability and will be revamping its website to address sustainability later this year. It must substantially improve its on-package labeling.

Red List Seafood Sales: Our store visit uncovered approximately nine red-listed species, though there are likely more at a nationwide scale. It is phasing out its sourcing of sharks and currently sells Alaska pollock, Atlantic salmon, Atlantic sea scallops, ocean quahog, ocean perch, South Atlantic albacore tuna, tropical shrimp, and yellowfin tuna.

#23 Publix

OVERALL SCORE 3.21



POLICY: 25 INITIATIVES: 42.5 TRANSPARENCY: 27 RED LIST: 34



#24 Save Mart

OVERALL SCORE 1.53



POLICY: 0 INITIATIVES: 0 TRANSPARENCY: 0 RED LIST: 61



Headquarters: Lakeland, FL

Stores and banners: 1,080 supermarkets operating as Publix

Background: Publix is the largest employee-owned supermarket chain in U.S. with supermarkets in five Southern states: FL, GA, AL, SC and TN. Its 2013 fiscal year revenue was \$28.8 billion.

Greenpeace Comments: For yet another year Publix has failed in the *Carting Away the Oceans* ranking. Keeping its actions, policies, and priorities out of sight, the company's refusal to share information keeps its customers and concerned citizens alike from understanding how Publix may (or may not) be working towards a more sustainable seafood operation. The company continues to ignore requests to discuss its seafood operations, dismisses surveys and inquiries, and offers no transparency as to its activities in this area.

Publix sells a large number of seafood species that are generally associated with serious sustainability concerns, such as shark, orange roughy, and Chilean sea bass. Publix would serve its customers, employees, and the oceans well by ceasing its support for these destructive fisheries. Given the aforementioned absence of any sort of transparency, all of the information contained in this report is gleaned from the company's annual reports, industry data, consumer surveys, store visits, and customer correspondence.

Sustainable Seafood Policy: Publix lacks a visible sustainable seafood policy. Although the company claims on its web site to have "developed and begun to implement our seafood sustainability program," there is no evidence as to what the program entails, how it is being implemented, or how it impacts what seafood is purchased and sold by the company. However, the unsustainable offerings in the store suggest that the company is either unable or unwilling to adopt a more robust sustainable seafood policy.

Seafood Sustainability Initiatives: Publix is working with Sustainable Fisheries Partnership (SFP) in a handful of fishery improvement projects (FIPs). While SFP has revealed some information about the purposes and timeline of these FIPs, the retailer has been unwilling to inform anyone about the percentage of its product that is actually sourced from these FIPs. Therefore, the extent of Publix's commitment to these FIPs is unknown.

Publix does occasionally have sustainability requirements that its suppliers must follow, and there is some degree of auditing. It also trains its suppliers on its policy requirements. It does not appear to communicate at all to either regulatory managers or policy makers on the need to support improvements in fisheries management.

Labeling and Transparency: Publix has some general information regarding seafood sustainability online, but it does not give consumers specifics about their sourcing. A Publix "Seafood Facts" brochure found at a store provides consumers with information about seafood, but nothing that guides consumers on sustainability. Similarly, there is no point-of-sale information either adjacent to the seafood or on the packaging.

Red List Seafood Sales: Publix sells 15 out of 22 red list species: Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, Chilean sea bass, Greenland halibut, grouper, ocean quahog, orange roughy, red snapper, shark, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

The company may be working in FIPs in three of these fisheries, but has not provided sufficient information to make an accurate determination on whether any product is actually being sourced through them.

Headquarters: Modesto, CA

Stores and Banners: 240 stores operating as Save Mart, S-Mart Foods, Lucky and FoodMaxx

Background: Save Mart Supermarkets owns stores in Northern and Central California and Nevada. Its posted revenue for the 2013 fiscal year was \$4.3 billion.

Greenpeace Comments: Save Mart is one of the five new retailers profiled in this year's report. It did not participate in this year's survey, and therefore all of the material for this evaluation is obtained from external sources. Save Mart should begin to engage in the process; some simple ways to start would be to develop a sustainable seafood policy and be more open and transparent with its consumers.

Sustainable Seafood Policy: Save Mart does not appear to have a sustainable seafood policy.

Seafood Sustainability Initiatives: Save Mart does not appear to participate in any sustainable seafood initiatives.

Labeling and Transparency: Save Mart sources its seafood from Pacific Seafood, but it is unclear which species it sources from the company. It does not provide customers with sufficient sustainability information either in the store or its website.

Red List Seafood Sales: Save Mart sells 10 out of the 22 Red List species including Chilean sea bass, Alaska pollock, Atlantic salmon, Atlantic sea scallop, ocean quahog, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

#25 Bi-Lo

OVERALL SCORE 1.15



#26 Roundy's

OVERALL SCORE 1.06



Headquarters: Jacksonville, FL

Stores and Banners: 849 stores operating as BI-LO, Winn-Dixie, Sweetbay, Reid's and Harvey's

Background: BI-LO operates stores throughout Florida and the Deep South. Last year, BI-LO purchased the Sweetbay, Reid's, and Harveys store banners from Delhaize for \$265 million; a total purchase of 165 stores which in 2012 generated revenues of about \$1.8 billion alone. This comes on the heels of having purchased Winn-Dixie the year before in an effort to grow and compete with rivals such as Delhaize, Publix, and Walmart in the southern U.S.

Greenpeace Comments: BI-LO has never participated in Greenpeace's retailer survey process. The company has made no efforts to acknowledge or act upon the concept of seafood sustainability. BI-LO's website remains devoid of information while its stores continue to sell a variety of unsustainable species and products.

As per last year, Greenpeace has reached out repeatedly to the company to no avail. All attempts at communication and cooperation have failed. Particularly in light of its recent acquisitions and growth, BI-LO's radio silence on seafood sustainability is disastrous for our oceans.

Sustainable Seafood Policy: BI-LO does not have a sustainable seafood policy.

Seafood Sustainability Initiatives: BI-LO is not affiliated with any retailer groups, fishing industry groups, seafood companies, third-party auditors, or environmental conservation organizations working on seafood sustainability. It makes no effort to engage policy makers on any issue pertaining to seafood sustainability.

Labeling and Transparency: BI-LO does not sufficiently label seafood products so that consumers can avoid purchasing destructively fished species, and the company does not promote sustainable seafood to its customers.

Red List Seafood Sales: BI-LO sells at least 13 of the 22 Red List seafoods: orange roughy, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, grouper, ocean quahog, red snapper, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.

Headquarters: Milwaukee, WI

Stores and Banners: 166 stores operating as Pick 'n Save, Copps, Rainbow, Metro Market, and Mariano's

Background: Roundy's stores are located in WI, MN, and IL. Its 2013 fiscal year sales were \$4.0 billion and the company began trading on the stock exchange on February 8, 2012. In December 2013, CEO Bob Mariano announced that it would rebrand the purchase of 11 Dominick's stores from Safeway as "Mariano's" in early 2014. Its Metro Market and Mariano's banners target a more urban, upscale demographic than the other banners.

Greenpeace Comments: Roundy's is one of the five new retailers profiled in this year's report. It did not participate in this year's survey and therefore all of the material for this evaluation is obtained from external sources. Sadly, Roundy's is second only to Kroger in the shameful practice of offering the most Red List species for sale. Its poor performance in all categories has landed this retailer in the bottom spot for this year's report. Roundy's must begin to engage in the process toward recovery. Some examples of low-hanging fruit would be to develop a public-facing sustainable seafood policy and to be more open and transparent with its customers.

Sustainable Seafood Policy: Roundy's does not appear to have a sustainable seafood policy. It promotes locally-raised trout as a sustainable product but does not provide sufficient details for an independent evaluation of these claims.

Seafood Sustainability Initiatives: Roundy's does not appear to be involved in any initiatives.

Labeling & Transparency: Roundy's does not provide in-store signage or labeling pertaining to seafood sustainability. On banner store Mariano's facebook page, the company struggles to answer its own customers' questions regarding seafood sustainability, with statements such as "We will have to look into this for you" and no visible follow-up.

Red List Seafood Sales: Roundy's sells 17 out of the 22 Red List seafoods: Atlantic halibut, Chilean sea bass, sharks, Alaska pollock, Atlantic cod, Atlantic salmon, Atlantic sea scallops, Greenland halibut, grouper, monkfish, orange roughy, red snapper, redfish, South Atlantic albacore tuna, swordfish, tropical shrimp, and yellowfin tuna.



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