

Sustainability in the Grocery Marketplace

Examples – Trends – Best Practices

How can METTLER TOLEDO weighing technology contribute to greater sustainability?

Where does food retail currently stand in relation to sustainability? This white paper sets out to provide you with a general overview. Chapter 2 contains numerous examples of food retailers' sustainability initiatives, illustrates trends and summarizes where the sector is today – and which role it can play in encouraging efforts to further improve sustainability. METTLER TOLEDO would like to take this opportunity to acknowledge PE INTERNATIONAL for its analysis work and for compiling this key chapter. PE INTERNATIONAL is a market leader in strategic consultancy, software solutions and services related to sustainability and its client base comprises more than 1,500 companies and institutes, many of which are market and sector leaders.³ Chapter 3 offers you insight into how METTLER TOLEDO, as the world's largest provider of weighing instruments for use in laboratory, industrial and food retailing applications, pursues its sustainability strategy. Chapter 4 then examines how METTLER TOLEDO Retail can help food retailers to achieve their sustainability goals in practice and provides several brief examples of best practice within the grocery sector. Ideas for a variety of initiatives and measures are shared in a best practice listing in Chapter 5.

This white paper has been written for food retailer decision-makers who – whether with large steps or small ones – are keen to advance the topic of sustainability within their companies. It is for those who wish to look beyond their own noses in the hope of discovering new ideas and inspiration – and who are keen to learn how METTLER TOLEDO Retail can contribute to greater sustainability.

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1. Doing Business Sustainably – Our Common Future

'Our Common Future', also known as the Brundtland Report, was published in 1987 by the World Commission on Environment and Development, which had been established by the United Nations in 1983. The report ignited the worldwide debate on sustainability and sustainable development.¹

Sustainable development is development "that meets the needs of the present without compromising the ability of future generations to meet their own needs," states the Brundtland Commission.² This definition, which revolves around the idea of intergenerational equality, forms part of every environmental agreement reached since. Intergenerational equality means no wastage of resources, no exploitation of the environment, and no improvements to today's living conditions at the expense of future generations.

The sustainability discussion reached mainstream society long ago. Companies are aware of their economic, environmental and social responsibilities. Consumers are making purchasing decisions based on sustainability considerations. An increasing number of people are adapting their lifestyles and consumption patterns in pursuit of a 'more sustainable' life. And nowhere do consumers make more purchasing decisions than in the supermarket, which fulfills their daily basic needs.

How sustainably does my company operate? How sustainable is my product range? The topic of sustainability presents food retailers with both a challenge and an opportunity. In an environment so profoundly competitive as the grocery sector, sustainability can become a branding tool and help to create competitive edge.

There are a huge number of different options for integrating the topic of sustainability into a company's positioning, into its marketing and communication strategy. Some companies believe that positioning oneself as a sustainable business should be a foregone conclusion for anyone moving with the times in the 21st century and find it hardly worth mentioning. Meanwhile, in the other extreme, there are companies who employ every conceivable marketing and communication instrument to hype each individual sustainability initiative.

At the same time, sustainability as a branding and differentiation tool is subjected to particular scrutiny, both by interest groups and by consumers. Sooner or later, they will see through sustainability claims which are little more than a marketing ploy. Unsubstantiated claims that products or practices are 'green' or 'greenwashing' is misleading. The very fact that this term 'greenwashing' has been coined illustrates the public's sensitivity to sugar-coated, deceptive behavior when it comes to sustainability.

Transparency and credibility are the currency of the sustainability discussion. Furthermore, in this age of online social networks, the power to communicate and interpret what is 'sustainable' and what is not increasingly lies with consumers themselves. It is no longer necessary to bypass media gatekeepers in order to publish information which may paint a company in a poor light, to challenge assertions or to pose critical questions. Each and every consumer is a potential 'broadcaster'. Everyone has a route into the public domain and a chance that their opinions will be heard.

For any company strategy, the only right response to this situation is to approach the topic of sustainability with due seriousness and to exercise extreme care and scrupulousness in relevant marketing and communication activities. Thanks to the prevalence of social media, anyone who thinks that they can get away with greenwashing is likely to find themselves suddenly and embarrassingly exposed – resulting in incalculable damage to their reputation.

2. Sustainability Trends in the Grocery Marketplace

Written by PE International

Over the last several years, the expectations on business to manage and demonstrate their environmental and social activities in addition to traditional performance factors, such as quality and cost, have increased. These expectations are coming from a wide range of stakeholders including investors, employees, business partners, regulators, and communities. Consequently many companies now talk about improving their “Sustainability” performance by understanding and driving improvements in the “triple bottom line”: their environmental stewardship and social responsibilities alongside their financial performance objectives. For some companies, sustainability is becoming part of the core business strategy as they are implementing a wide range of programs to drive innovation and performance. Some major retailers in the grocery category, like Wal-Mart, Tesco, Marks & Spencer, and Carrefour, have become leaders in sustainability with the programs they have designed to improve their environmental and social impacts.⁴

In addition, major grocery retailers like Kroger, Publix, Safeway, Wegmans, REWE and others are also adding a sustainability focus to their business operations. As the number of retailers implementing sustainability grows, it becomes increasingly clear that sustainability is a new way of thinking and operating that is firmly taking hold among leading grocery retailers.

The influence grocery retailers have on major manufacturers of consumer packaged goods products, and other products sold in the retail environment, is growing as manufacturers respond to price pressures and competition for shelf space. When it comes to sustainability, retailers sit at a critical juncture or pivot point, because they reach not only hundreds of millions of consumers, but also tens of thousands of suppliers⁵. Retailers occupy the most influential stages in the life cycle of a consumer product – able to influence how it is made and transported, who buys it, and through their point of sale information, even how it is consumed and disposed of.

Over the last few years, grocery retailers are increasingly using their influence to develop sustainability programs that pressure the first half of the product life cycle, suppliers, to improve the sustainability of their operations and products. A highly influential example is Wal-Mart’s sustainability index^{6,7}, which is increasing transparency and driving greater awareness of sustainability issues among suppliers. When it comes to the other half of the product life cycle, consumer habits have been more difficult to influence. While there has always been a core base of consumers interested in environmentally and socially responsible products, currently, the sustainability focus of leading retailers far exceeds the average consumer thinking on these issues. However, as sustainability becomes further entrenched and competitive within grocery retailers, consumer habits will change, as retailers offer information and encourage, sometimes ‘choice editing’, the purchase of more sustainable products.

As retailers navigate this pivot point between consumers and suppliers and try to meet goals focused not just on profits but also on environmental and social responsibilities, three sustainability trends emerge that many major retailers are currently addressing.

- Retailers are focused on driving down operational costs by integrating sustainability into their business operations and organizational structures.⁸
- In an attempt to deliver more sustainable products to consumers, retailers are also developing sustainable sourcing plans.⁹
- Retailers are increasing engagement not just with employees but also with customers and the communities within which these businesses operate.¹⁰

2.1. Building Sustainability into the Business

Retailers' sustainability programs often begin with a focus on increasing efficiency of internal operations. Driven by cost pressures and low margins, retailers are not only actively tracking the environmental impact and natural resource use of their operations, but in some cases setting goals for reducing that impact and resource consumption. Some retailers set many detailed goals across a wide variety of categories. For example, Marks & Spencer presents its overarching vision for sustainability in a program called Plan A (because there is no Plan B).¹¹ Plan A includes tracking progress toward 180 total commitments. These commitments, such as reducing carbon emissions by 35 % and helping customers make a difference in the social and environmental causes that matter to them, guide Marks & Spencer's operational investments and updates to processes and materials.¹² Other retailers are focused on a smaller number of broad goals. Tesco is driving toward becoming a zero carbon (generating renewable energy onsite that flows back into the grid neutralizing any carbon use) business by 2050 and sets intermediate targets along the way to drive toward that goal.¹³ Target's goals are also broad and focused on transportation, building construction, greenhouse gas emissions, water use, and operational waste.¹⁴ The REWE Group is following a similarly diverse sustainability strategy. It has defined four pillars of sustainability as the basis for its activities: "Green Products", "Energy, Climate and the Environment", "Employees" and "Social Involvement".¹⁵

In addition to tracking energy use, water use, or emissions, many retailers are specifically focused on waste reduction. These goals may be broad like zero waste to landfill from stores (e.g., one of Wal-Mart's goals¹⁶), but may also be more focused on types of waste. Spoiled food, which represents a significant percentage of the overall waste created by retailers, not only impacts the environment through loss of natural resources and unnecessary greenhouse gas emissions, but it also impacts sales. Ahold is in the process of establishing a better method to track food waste, as it has traditionally used shrink as an approximate measure.¹⁷ However, this percentage includes theft and donations; therefore, the retailer is exploring new methods in order to establish goals. Ahold is also developing goals focused on reducing own-brand packaging waste and creating a packaging improvement program.¹⁸ Many retailers communicate more heavily about plastic bag reduction efforts than food waste efforts, as consumers are more exposed to plastic bag waste. Most major retailers have some type of plastic bag reduction initiative via offering reusable bags for purchase, a small discount for using reusable bags (Whole Foods¹⁹), or plastic bag recycling in stores (Publix²⁰, Target²¹).

While retailers are improving operations at existing stores, they are also considering sustainability as part of the development and construction of new stores. Many retailers, like SUPERVALU and its LEED Gold certified store in Minnesota²², have created new store designs that meet Leadership in Energy and Environmental Design (LEED) green building criteria. In Europe, REWE opened its first "Green Building" food retail store in Berlin in 2009, which resulted in the company receiving a gold rating from the German Society for Sustainable Building (DGNB). In addition to the REWE Green Building store using 50 percent less energy, it also generates 40 percent of the energy it needs directly on the premises.²³ Meanwhile, SPAR Austria's climate protection supermarket in Graz produces its entire energy requirement on site, making it fully energy-independent.²⁴ Target has also focused on smart design of new stores by renovating existing buildings rather than constructing new buildings for its small format stores in urban areas.²⁵ In other areas, Target has explored building on and remediating areas where the soil has been contaminated (brownfield sites)²⁶ rather than building on healthy soil. For both existing retail sites and new buildings, retailers, like Tesco, are using reporting and software tools to track the energy performance of buildings.²⁷ These tools help retailers track building performance in real time and make adjustments.

All of the operational practices from tracking resource use to waste reduction strategies to building and construction practices are not initiatives designed to meet a passing trend or fad. Retailers are creating the governance and organizational structures that enable them to develop effective sustainability programs that drive performance, save money and build brand loyalty. Leading programs have clear targets, well defined implementation plans, as well as

reporting and review procedures. This kind of strong governance structure ensures accountability, meaningful changes to business processes, and follow-through. Internal champions that drive programs forward are also a critical success factor, particularly in the early stages of a program. For example, Delhaize recently added a Chief Sustainability Officer to its organizational structure to facilitate achieving its sustainability goals²⁸, and Tesco has created a corporate responsibility committee that comprises 16 senior executives from across the group of stores.²⁹

2.2. Sourcing Sustainable Products

Retailers' sustainability focus does not only pertain to in-store operations and organizational governance, but also to the actual products stocked on the shelves.³⁰ Sourcing more environmentally and socially responsible products is a challenging issue that typically requires retailers to engage not only with suppliers, but also non-governmental organizations, industry associations, and sometimes other retailers. The Sustainability Consortium, a collective of retailers, manufacturers, and academia, was created in partnership with Wal-Mart to consider the sourcing of sustainable retail products.³¹ The Consortium is currently focused on developing performance indicators on the environmental impact of major stages in the life cycle of every product category in retail stores. These indicators will be used to engage with suppliers about what they are doing to address these impacts throughout the product lifecycle. Thus far, The Sustainability Consortium has finalized indicators for a small number of categories and is beginning to research many more. Wal-Mart has used the research gathered by The Sustainability Consortium to inform its Sustainability Index. In late 2012, Wal-Mart announced a new goal to source 70 % of its products from suppliers participating in the Index by 2017.³²

While efforts like the Consortium's and Wal-Mart's have the potential to re-shape the industry and suppliers, it can be challenging to build a sustainable sourcing program. Focusing on building responsible relationships with suppliers and educating them on adding sustainability into their operations and product development is only one piece of the sustainable sourcing puzzle. Most products in retail stores have many different suppliers and in turn, many different data points associated with them. Systems and processes must be developed to process, track, and manage this data.^{33,34,35} To attempt to better understand this data and develop these processes, retailers often look to outside groups for help. For example, Ahold, in an effort to better understand the environmental footprint (including water, energy, emissions, and waste) of its own-brand suppliers, is working with The Sustainability Consortium to map 50 % of its own-brand suppliers and their supply chains.³⁶ Ahold is also auditing and certifying own-brand suppliers in the US and Europe to a recognized standard by the Global Food Safety Initiative to ensure the safety of its products.³⁷ To narrow the sustainable sourcing issue, many retailers focus on sustainable sourcing of particular product categories. For example, while Whole Foods is the only major retailer committed to sustainable sourcing of produce and meat, most major retailers have a sustainable seafood program. These programs typically provide guidelines for the types of species that can be sold in the store based on how the species is generally managed and caught. To do this, retailers rely on non-governmental organizations and science based programs that have created lists ranking the sustainability of certain species or certification programs to guide their sustainable seafood programs. For example, the Marine Stewardship Council (MSC) has developed a certification program to evaluate fisheries and seafood traceability.³⁸ Those fisheries that meet MSC standards receive a blue "MSC Certified" label on their products.³⁹

Whole Foods has partnered with MSC to offer as much MSC certified seafood as possible.⁴⁰ For fish that are not MSC certified, Whole Foods has also partnered with the Blue Ocean Institute and Monterey Bay Aquarium to color code those wild-caught species in order to provide shoppers with sustainability information.⁴¹ In April 2012, Whole Foods announced that it would stop selling any species that are "red rated" and several other species unless caught using sustainable methods.⁴² While Whole Foods' sustainable seafood program is certainly the most far reaching, many other retailers, including Trader Joe's, which releases very little information on its business practices, have sustainable seafood programs.⁴³ Most major grocery stores like Kroger, Publix, Safeway, SUPERVALU, Wegmans, Loblaws, REWE, and Tesco have sustainable seafood programs, as do mass retailers like Target, Wal-Mart, and Marks & Spencer.

Kroger has partnered with World Wildlife Fund to assess fisheries and has also committed to source from MSC certified products.⁴⁴ Meanwhile, the EDEKA Group has been selling almost exclusively sustainably caught or farmed fish since the start of 2012, which has likewise resulted in a partnership with World Wildlife Fund.⁴⁵



Sustainable seafood is not the only area of the store where retailers focus sustainable sourcing efforts. Most retailers also carry private brand organic products in a wide variety of product categories: produce, meat, dairy, dry packaged goods, and frozen foods. With its “Pro Planet” initiative, the REWE Group has gone a step further, creating a certification program for sustainable own-brand products. The Pro Planet label is only awarded to products that have a reduced negative impact on the environment throughout the entire value chain, and the five-step certification process is independently verified.⁴⁶ As of August 2012, 450 products in the REWE range had obtained the Pro Planet label.⁴⁷ Other retailers offer products that are labeled fair trade. For example, Ahold tracks the number of fair trade and organic products it sells as one of its sustainable product metrics.⁴⁸ Sourcing of critical commodities is also an area of focus for some retailers. Ahold is working with several other organizations to track progress on the sustainable sourcing of five commodities for its own-brand products: palm oil (member of Roundtable for Sustainable Palm Oil), tea (UTZ certified), coffee & cocoa (UTZ certified, Fair Trade, & Rainforest Alliance), and soy (member of Roundtable on Responsible Soy).⁴⁹ Other typical product categories where retailers are offering environmentally or social responsible options are cleaning products, lighting, bathroom tissue, and other paper products.

2.3. Creating Community

Retailers are not only focused on their internal operations and the products they sell, but the people who they rely on to drive the business: their employees, customers, and the communities within which they operate. The key component of the social responsibility element of any sustainability strategy is a focus on the people on which corporations have an impact. For employees, retailers are supporting sustainable actions in employees’ work and homes. Wal-Mart employees’ can create a “My Sustainability Plan” and choose goals that fit their lifestyles and then track progress against those goals online. The plans also allow employees to connect with colleagues who

share similar goals, provide encouragement for achieving them, and gain inspiration to create new goals.⁵⁰ Marks & Spencer also engages its employees and has provided free energy monitors and home insulation, encouraged one day of paid volunteering, and interfaced with employees to better understand opinions of the company's operations.⁵¹

Retailers also want to connect with their customers and act as a source for information for healthy eating choices. Wal-Mart has released a "Great for You" label on its private label items to direct consumers toward healthier products. In addition, national brands can also apply the label if they meet the label qualifications.⁵² Ahold has also released a logo called "Healthy Ideas" which has been applied to 4,000 products (both own-brands & national brands) and denotes products which meet the U.S. government criteria for healthy food. Ahold is also trying to increase the amount of healthy food sold in its stores to 25% by 2015.⁵³ To improve access to its organic produce, Whole Foods has lowered prices on many produce items.⁵⁴ Additionally, Whole Foods has expanded its Health Starts Here program which provides meal plans, recipes, and healthy eating tips by piloting Wellness Clubs in 5 cities in 2011. The clubs were designed to create dynamic healthy eating communities within stores, offering individualized wellness programs, healthy lifestyle coaching, cooking classes, and healthy dining alternatives for customers and members.⁵⁵ In Europe, both Tegut and the Real chain, which is part of the METRO GROUP, have customer advisory boards which enable them to take shoppers' needs and opinions into consideration when making strategic decisions.⁵⁶ Additionally, Tegut provides its customers with a wide range of information about sustainability and even operates a number of allotments in which Tegut customers can grow their own vegetables.⁵⁷

Engagement with the broader community is also important to retailers; most donate to community organizations, support volunteering in the community among employees, and offer special community development programs. Kroger is a "Mission Partner" of Feeding America, the largest group of food banks in the US, with Kroger stores donating 65 million pounds of food and other products to food banks in 2010.⁵⁸ Tegut and REWE likewise work with food banks.⁵⁹ Safeway contributes to food banks, breast cancer research, earthquake disaster relief in Haiti, and educational programs.⁶⁰ Carrefour runs the Carrefour Foundation which supports a wide variety of initiatives focused on access to food, global humanitarian crises, rural development, and several local initiatives.⁶¹ These examples are only a small piece of the community engagement in which retailers are involved.



2.4. The Future of Sustainable Retail

Sustainability in grocery retailers began for a variety of reasons: pressures to cut costs, brand enhancement strategies, or competitive pressures. However, now due to operational goals that align with overall business strategy, effective organizational structures, respected sustainable sourcing programs, and increased engagement with the people these businesses impact most, sustainability is firmly entrenched as a source of opportunity and competitive advantage. As leading retailers like Wal-Mart, Marks & Spencer, Carrefour, and Tesco introduce new, innovative sustainability programs, the pressure on traditional retailers to further incorporate sustainability practices into their businesses will increase. While retailers remain ahead of consumers on sustainability thinking, new programs and external drivers, such as climate change, are expected to influence consumer habits and purchasing decisions. The future of sustainability in the retail sector is exciting, not simply because there are clear leaders within this industry, but because the leading sustainable retailers (Wal-Mart, Carrefour, Marks & Spencer, and Tesco) are also seen as leaders within corporate sustainability as whole. The vision for sustainability that these companies have articulated is, in many cases, far reaching and forward thinking. There is an opportunity for leading retailers to use their current and future sustainability achievements as a platform to spur further innovation within their own operations and their supply chains. For example, major manufacturers have released unique sustainability initiatives, like Unilever's commitment to double sales while halving the environmental footprint of its products. Other innovation opportunities may extend to new health & wellness services, new ways of manufacturing fast moving consumer goods, or even new methods for retailer engagement with the community. These kinds of innovations coupled with lower operational costs all have the potential to expand the profit margin in a constrained industry by bringing more value at reduced cost. In fact, Marks and Spencer notes in its 2102 Sustainability report that Plan A activities contributed an additional net benefit of £105m (approximately 165m USD) during 2011 & 2012, which was available to reinvest back into the business.⁶² This example and others throughout this paper prove that as sustainability advances occur in a wide variety of industries, retailers will have an important role to play to achieving a more resilient future.

3. METTLER TOLEDO and Your Sustainability Strategy

The trends outlined in Chapter 2, of pursuing a sustainable purchasing policy and organizing business processes sustainably, have a direct impact on the company's relationships with its suppliers and partners. In this case, sourcing issues extend far beyond the products themselves to include investment decisions in infrastructure and production equipment as well as the continual replenishment of consumables. Process optimization does not stop at the company's own walls but instead also involves suppliers and partners, especially with regard to the sustainability of process design. Services such as maintenance and repairs throughout the entire lifecycle of technical equipment have been given as examples: when do these services necessitate an on-site visit to a customer, which in turn increases the carbon footprint? To what extent could such a site visit be replaced by a more environmentally friendly remote-service alternative? Which measures are service partners implementing to reduce the carbon emissions related to site visits, such as improving the efficiency of their fleet management?

Although today's methods for analyzing and calculating the carbon footprint of both the supply chain and the external process chain are still far from advanced, obtaining commitment from suppliers to embed sustainability in their processes and product development is nevertheless – as described in Chapter 2 – a central building block for any sustainability-based procurement policy. Even if the complexity of the task means that there is no suitable framework for truly comprehensive analysis and evaluation, this should not prevent a company from putting potential suppliers to the test and subjecting them to an initial plausibility check. Aspects to be examined would include the level of importance the supplier places on sustainability within its corporate strategy, and whether it can substantiate this with documentation demonstrating that measures have been implemented and objectives have been achieved. This gives an initial impression of the transparency and credibility of the supplier's approach to sustainability and whether it actively pursues sustainability goals.

3.1. Sustainable Business

Today, METTLER TOLEDO is the world's largest provider of weighing instruments for use in laboratory, industrial and food retailing applications.

For METTLER TOLEDO, the term "sustainability" means many different things. It defines the company's approach to decision-making, to how it manages its impact on the environment, and to how it manages its relationships with customers, employees, suppliers, shareholders and the communities where it does business.⁶³ Most importantly, METTLER TOLEDO believes that a sustainable business is one that is positioned for long-term growth. "Sustainability" touches all aspects of the company's business.

In July 2011, METTLER TOLEDO published its first sustainability report, prepared in line with the Global Reporting Initiative (GRI) – the world's most prevalent voluntary standard for use by companies when reporting on sustainability.⁶⁴ The main aim of the GRI, a not-for-profit organization, is to create a framework for a systematic and transparent approach to reporting on sustainability in a standardized format which enables accurate comparisons. To this end, GRI is working to establish long-term international dialogue with many different interest groups to learn from their experiences of using and implementing the current guidelines. In the years ahead, as more data becomes available, METTLER TOLEDO will present even more comprehensive data than that contained in its first sustainability report. By publishing a sustainability report, METTLER TOLEDO is committing to ongoing internal and external communication on its environmental performance.

3.2. GreenMT Initiative



In 2010, METTLER TOLEDO launched the GreenMT initiative. The centerpiece of the GreenMT program is the comprehensive measurement of resource usage and emissions as a means of determining the company's global carbon footprint. As part of the initiative, the company collected data across the company, including fuel usage in its fleets and the electricity usage of all of the buildings it occupies. For the first time, key indicators of the environmental impacts of the company's operations were collected in a systematic, harmonized manner in all regions where METTLER TOLEDO operates.

Based upon this calculation, it became clear that a major contributor to the company's overall greenhouse gas footprint was its corporate vehicle fleets. METTLER TOLEDO relies on these vehicles to transport its sales teams as well as service technicians. In addition to this, heavy trucks are used in certain operations to transport equipment to customers' sites. Analysis showed that the five largest vehicle fleets – in North America, Germany, France, Mexico, and the Nordic Regions – contributed approximately one-third of the total greenhouse gas emissions.

In order to reduce this, the company is working on the following actions: First, a new vehicle replacement policy is in development across all operating units which will require all new vehicles to have improved fuel efficiency over the existing fleet. Secondly, the company is working with its fleet management agencies to implement driver training programs that focused on energy-efficient driving techniques. Lastly, it is exploring programs to test new vehicle technologies and new routing systems to maximize efficiency, as well as examining the logistics of operating its field staff – including methods of transportation and scheduling – to ensure that energy consumption is kept to a minimum and to maximize the effectiveness of its field sales teams. Furthermore, the company is working to encourage customers to make greater use of opportunities for remote maintenance and remote assistance, which already form part of its current service offering.

3.3. Reducing Energy Consumption, Improving Energy Efficiency

As a global business, METTLER TOLEDO's environmental impact extends beyond its consumption of fuel and electricity, which are regarded as the typical sources of greenhouse gas emissions. In addition, equipment supplied by METTLER TOLEDO requires external sources of energy in order to operate, thus contributing to customers' overall energy consumption. Therefore, a key priority for METTLER TOLEDO is to reduce energy consumption of products during their use phase as well as to improve their energy efficiency. METTLER TOLEDO has initiated research into its products in order to evaluate their impact on its customers' total energy consumption. METTLER TOLEDO will use the data obtained to establish goals and start to make reductions in these emissions. This plan may include a new approach to managing the company's vehicle fleets, incorporating new design features into products, improvements to the energy efficiency of buildings and processes, and looking at how the electricity used in its facilities is sourced.

A quantitative assessment of the environmental impact of the upstream side of METTLER TOLEDO's global supply chain is far more challenging. With thousands of different products, the supply chain includes tens of thousands of components that come from suppliers around the world. METTLER TOLEDO has taken preliminary steps to assess the greenhouse gas footprint attributable to its supply chain, and is identifying opportunities to reduce that footprint where possible. Options under consideration include material substitution where technically and economically

viable, increased utilization of recycled materials, implementation of more energy-efficient transportation methods, and improved packaging of incoming materials and outgoing products. Furthermore, within the framework of the GreenMT initiative, METTLER TOLEDO has set itself the task of exploring how the use of so-called “grey energy”, which is consumed in the manufacture, storage, sale and disposal of a product, can be reduced in a way which is technically and economically viable.

3.4. Environmental Protection

METTLER TOLEDO views environmental protection as an integral part of responsible business practices and is therefore committed to continuously refining products and processes, conserving resources, recycling, and monitoring its environmental performance. METTLER TOLEDO approaches environmental management with stringent regard for all applicable laws and regulations relating to environmental protection, health, and safety in the workplace. METTLER TOLEDO is working continuously to upgrade the energy efficiency and minimize the environmental impacts of its corporate locations. All of the company’s key manufacturing facilities in Germany, Switzerland, the United States, China and the United Kingdom are ISO 14001 certified. Our long track record of environmental improvements was acknowledged in 2011 when our Swiss operations received the Zurich Energy Efficiency Award.

4. Sustainability in the Grocery Marketplace

When collaborating with food retail organizations, METTLER TOLEDO's retail division concentrates on a few clearly defined areas of competence – so-called focus zones – namely fresh produce, service counter, backroom, bakery, checkout and specialty.

For these areas, METTLER TOLEDO Retail markets weighing, labeling, and packaging systems, and provides after-sales support for them during their entire lifecycle. Since such solutions are highly integrated into a food retailer's business processes nowadays, they represent a strategic investment decision based on a long-term partnership. Their strategic reach even extends so far as to have a direct impact on a grocery organization's sustainability strategy and the attainability of its sustainability goals.

4.1. Sustainability in METTLER TOLEDO Retail

The first stage is to assess – albeit on a rather abstract level which is difficult to quantify in hard facts and figures – whether a potential supplier's sustainability strategy harmonizes with the retailer's own business philosophy; is the supplier's position on sustainability at least on a par with the sustainability strategy of the retailer? Is there sound evidence to back up the supplier's approach to sustainability? Food retailers can leverage their position of strength to lead the industry towards greater sustainability by including their own sustainability-based objectives, preferably based on concrete tasks, in their specifications for suppliers. This range of requirements can comprise both qualitative and quantitative criteria. As a rule, quantitative criteria can be applied very precisely to the prospective investment decision in order to advance one's own sustainability objectives. Examples could include the stipulation of maximum levels of energy a device may use in various modes of operation. However, qualitative factors can also serve as 'hard' selection criteria: a preference for housing materials which can be recycled, for example, or the extent to which equipment maintenance can be carried out via remote service methods. In particular, a comprehensive list of questions can be one of the qualitative tasks, requiring suppliers to disclose information about the extent to which sustainability is embedded in their company and reveal their sustainability objectives. The more detailed this list of questions is, the easier it will be for the food retailer to reach a fair estimation and evaluation of the 'soft' factors in a potential supplier's sustainability policy. The aim is to answer the following fundamental question: is the supplier's sustainability strategy compatible with one's own corporate and sustainability goals? The best-case scenario is that the supplier's responses provide an extra boost, accelerating the retailer's path towards sustainability and enabling it to achieve its own sustainability objectives more quickly.

While Chapter 3 provided an initial indication and assessment of how METTLER TOLEDO incorporates the topic of sustainability into its own approach to business at the strategic level and offered a brief overview of the company's objectives, initiatives and measures, the rest of this white paper will concern itself with sustainability at the operational level in METTLER TOLEDO Retail's specific areas of competence: fresh produce, service counter, backroom, bakery, checkout and specialty.

4.2. Reducing the Company's Carbon Footprint

In the areas mentioned above, weighing, labeling and packaging technology can contribute to energy savings. Furthermore, the technology also presents a useful starting point for improving a food retailer's eco-friendliness in terms of its use of packaging materials, with regard to both the quantities and environmental soundness of the materials used.

The greater energy efficiency of devices and the associated reductions in a food retailer's energy consumption significantly benefit the sustainability assessment of the equipment used for weighing, labeling and packaging. Using more energy-efficient devices will improve a grocery retailer's carbon status and hence make one of the most important and direct contributions to sustainably reducing the company's carbon footprint. A handful of examples illustrate the extent of the impact: for an average-sized supermarket in the USA with 50,000 square feet of selling space, annual energy expenditure amounts to approximately USD 4 per square foot, which is equivalent to USD 200,000 for that supermarket per year.⁶⁵ The resulting carbon emissions amount to 1,900 tons – this is comparable to the annual carbon emissions generated by 359 cars driving around nearly 11,500 miles per year with an average combined fuel economy of 21.6 miles per 100 gallon.⁶⁶ The EHI Retail Institute has even calculated energy costs to be more than EUR55 per square meter per year.⁶⁷ These examples illustrate the sheer potential effect if major retail chains could succeed in reducing their carbon emissions through energy savings. While actual levels of energy consumption vary between individual branches due to differences in local climates, it is safe to say that refrigeration, lighting and air conditioning make up the lion's share of energy costs across the board. The EHI Retail Institute states that, at around 45 percent, refrigeration uses the most energy, for example, and the three areas of refrigeration, lighting and air conditioning together account for some 80 percent of the total power consumption.⁶⁸ However, the remaining one-fifth of the electricity usage is generated by the IT infrastructure and other equipment.⁶⁹ This ratio underlines the fact that it is worth looking beyond the main culprits of refrigeration, lighting and air conditioning when considering ways of saving electricity. Especially in view of the high quantities of energy involved, it makes sense from an economic and an environmental perspective alike to improve the retailer's carbon status by also reducing power consumption in the areas of IT infrastructure and other devices.

Within weighing, labeling and packaging technology, various avenues are opening up to reduce a retail company's carbon footprint, not only in terms of hardware, software and the materials used but also as the devices become more service and maintenance-friendly. At a component level, for example, METTLER TOLEDO strives to ensure that, when updating its models, each new generation of a device can achieve the same if not better performance as its predecessor while using less power. Such sustainability improvements at component level are founded on hardware optimizations which first and foremost demand a purchasing policy that factors in sustainability in addition to price and



performance. The UC Evo Line of touchscreen scales is a prime example of this: when this range was launched, the energy consumption for the local mass storage device, the motherboard, the touchscreen controls, the customer display, the printer and the display controller had been reduced in comparison with the previous range UC3, while the processor offered greater computing power at the same level of energy consumption. In a typical business situation, the electricity usage for the UC Evo Line's components is down by approximately one-sixth compared with the previous generation of the UC3 range of scales. Since the UC Evo Line offers comparable model types for almost all areas of competence apart from the checkout – i.e. from classic counter scales, through compact scales for labeling and pricing in the backroom, to self-service scales for the fresh produce department – a retailer switching to this range of scales can enjoy carbon benefits in these areas. And in the checkout area, METTLER TOLEDO customers have yet another opportunity to reduce their carbon footprint: a reduction in power consumption is one of the key improvements in the latest range of checkout scales, Ariva, which METTLER TOLEDO is currently launching successfully in a number of different models.

METTLER TOLEDO weighing, labeling and packaging technology – especially front-of-store weighing technology – often tends to be used in situations in which the usage intensity fluctuates dramatically in the course of a day and a week. Variations in shopper numbers have a direct impact on the utilization levels of equipment at service counters and in fresh produce departments in particular. Therefore, on the hardware used in such areas, it is worth implementing pre-programmed energy-saving modes which ensure that the device is readily available for use yet also prevents the equipment using unnecessarily high levels of power during periods when it is not in active operation. Nowadays, contemporary devices such as the UC Evo Line of scales use four modes: 'Printing mode', 'Operational mode', 'Sleep mode' and 'Standby mode'.

These scales use the most power in printing mode, ranging from 43 to 78 watts. This depends on the dot density; in other words, the retailer can indirectly influence the energy consumption in the printing mode through the design of receipts and labels. The quicker the printer works, the shorter the usage peaks. Hence, optimizing the printing speed while maintaining the same energy consumption for the printer ultimately has a positive effect on the device's carbon footprint. At a technological level, the user has no influence on the printing speed; users can only benefit from technical developments on the part of the manufacturer. However, at an operational level, retailers can do their bit by adapting the duration of the printing process, such as by using receipts and labels pre-printed with logos and suchlike, and by asking themselves the following question: which information really needs to be on the receipt or label? Which details are legally required, and which could be potentially omitted? However, METTLER TOLEDO is so far not aware of any applications in which the design of receipts and labels has been adapted in order to shorten the printing time against the backdrop of greater sustainability.

Actual operation offers few if any opportunities for energy savings. Power consumption for the UC Evo Line products used in this example varies between 32 and 36 watts. This narrow range of fluctuations covers the device when idling, when in operation – both weighing activities and touchscreen entries – and any computing activity which is occurring in the background such as visual merchandising messages running on the customer display. Please note: the scales unit only consumes this level of power when actually being used.

The most significant tool for reducing a scale's power consumption is the sleep mode. After a certain amount of time, which can be configured in line with the retailer's preferences, the customer and/or touchscreen operator displays switch off, yet are reactivated within a split second of the weighing plate or touchscreen operating panel being touched. The sleep mode achieves a reduction of 8 watts of power per display, which amounts to 16 watts of energy savings for the touchscreen operator display and the customer display together. Furthermore, when configuring the sleep mode, the touchscreen operator display and the customer display can be dimmed for a long-term, sustainable reduction of power consumption. When installing the scales, the brilliance setting on the displays should be immediately adjusted, taking into account the level of situational light, to ensure optimum legibility and clarity. Especially in retail environments which are purposely darker in order to create a certain atmosphere,

dimmed displays benefit the in-store design and the energy bill in equal measure. Nowadays, METTLER TOLEDO integrates LED backlighting into its touchscreen operator displays and customer displays. In contrast to LC displays, LED backlighting uses less power, is classed as eco-friendly – since no mercury is used in its manufacture – and demonstrates an impressive useful life of up to 100,000 hours at continual luminance.

4.3. Durable Design and Materials

Likewise, the design of the devices and the materials used in their manufacture can help to improve the sustainability status. For instance, METTLER TOLEDO strives to use robust, durable materials which can withstand many years of operational wear and tear and which are suitable for recycling. Some prime examples include METTLER TOLEDO equipment with housings made from die cast aluminum or a high-performance polymer or devices featuring stainless steel weighing plates. The aluminum die casting process produces housing with thin yet highly stable and resistant walls, thus contributing to a reduction in the amount of material used. While the aluminum production process entails a greater energy consumption than alternatives such as die cast steel, that is only the case for primary aluminum. Smelting aluminum collected for recycling, for example, requires less than ten percent of the energy used in producing primary aluminum.⁷⁰ Its tremendously long life and full, virtually infinite potential to be recycled are definite plus points when evaluating aluminum's sustainability. To underline the situation: approximately three-quarters of all aluminum that has been produced since 1888 is still in circulation in some form today.⁷¹ Furthermore, the metal's high thermal conductivity enables any heat generated in a device to be dissipated via the housing. Hence, all heat generated by the UC Evo Line's touchscreen scales is dissipated via the aluminum housing components; the devices operate without a fan, which means that no extra power is consumed in carrying off the heat, and that the circulation of potentially unhygienic air in the vicinity of food products is avoided.

In the case of equipment with a synthetic housing, METTLER TOLEDO is committed to using scratch and knock-resistant high-performance polymers. At the end of the device's product life cycle, these high-performance polymers still have a value in terms of the energy they can generate, their reclaimable raw materials and recyclable waste products. As with all synthetic parts used, the housing components comply with a recycling code, in accordance with the SP Resin Identification Coding System which was developed in 1988, whereby they can be dismantled and disposed of individually for separate recycling.

4.4. Sustainable Consumables

Labeling, pricing, packaging: every day, the food retail sector uses high volumes of consumable materials such as receipt paper rolls, labels and packaging films. Here, opportunities for improving sustainability lie on the one hand in technology which can improve the utilization of the materials, and on the other in materials which produce less waste and/or can be recycled easily.

One example of how technology can help to reduce the use of resources when it comes to consumables is the automated packing stations in METTLER TOLEDO's Commander and 647 Solo[®] Max ranges. Thanks to the use of innovative 4-way stretch wrap technology, these machines succeed in reducing the amount of film used to pack products by approximately a quarter in comparison with traditional packaging technology. In this system, the integrated software determines how the packaging film should be optimally stretched and pulled taut, in all four directions, depending on the specific products and trays in question. For products and containers (e.g. trays) which are less able to withstand pressure, the film is pulled less tautly, while a significantly firmer, material-saving tautness can be applied to less sensitive items such as strong containers and packaging which does not come into direct contact with the product. Reducing the amount of packaging film used during the packing process in turn reduces the amount of household

waste for consumers too. Needless to say, the Commander and 647 Solo® Max model ranges support the use of biodegradable packaging materials such as Earthcycle packaging, which is made from palm fiber. This FDA and CFIA-certified packaging material is suitable for many food products, is even microwave safe, and biodegrades in around 90 days when placed on the compost heap.⁷² The palm fiber materials used to make Earthcycle packaging was previously regarded as a waste product and was incinerated. Nowadays it is replacing plastic packaging for both organic and conventional fresh goods at many leading retailers in the USA, including Wal-Mart, Wegman's, Trader Joe's, Publix, Kroger and Whole Foods.⁷³



Under the brand name 'Labeling Green', METTLER TOLEDO supplies a range of phenol-free labels and receipt paper rolls for checkouts and scales. The coating on traditional thermal imaging paper contains the controversial chemical compound bisphenol A (BPA), which can enter the body through contact with the skin. In view of their routine handling of large numbers of receipts, cashiers in the retail sector are at particular risk. According to an EU declaration, high doses of the chemical have been linked to infertility and loss of sight, as well as the onset of allergies and even diabetes.⁷⁴ In April 2008, Canada was the first country in the world to officially classify BPA as hazardous to human health and it banned the use of BPA in baby bottles.⁷⁵ In January 2010, the USA's FDA announced that new governmental research had given rise to some concern about the effects of BPA in such products on various human organs.⁷⁶ Until further results are available, the FDA recommends minimizing the intake of BPA through ingestion and therefore supports manufacturers in switching to BPA-free bottles.⁷⁷ Furthermore, the FDA advocates concrete governmental controls.⁷⁸ With its Labeling Green products, METTLER TOLEDO currently offers the world's first fully BPA-free labeling solution which has completely eliminated the use of phenols and replaced them with an alternative based on natural components. The alternative is demonstrably nonhazardous and already approved within the scope of the EU's REACH Regulation for the registration and restriction of chemical substances. The paper used originates exclusively from FSC-certified sources, and it contains only solvent-free adhesives. Polypropylene serves as a substrate or base material and this can be completely recycled via a dedicated recycling program. After recycling, the base material is processed into a composite and used as patio decking or covering on building

facades, for example. Thanks to the thinness of the base, which enables around 20 percent more labels per roll, the amount of waste is also reduced. The novel polypropylene base material eliminates paper dust which can clog up the printer unit, and the labels do not contain chemicals which could damage the printing heads. As a result, the amount of maintenance required is reduced, the useful life of the printing heads is extended, and ultimately fewer on-site service visits are necessary over the course of the device's life cycle.

4.5. Remote Service

With the arrival of PC-based standards for hardware and software, weighing, labeling and packing technology has undergone a significant transformation in recent years. Nowadays, PC-based technology as well as secure, highly protected transmission methods for sensitive and business-critical data via the internet are opening up new opportunities for food retailers: thanks to remote services, they can reduce the maintenance and servicing costs for their weighing, labeling and packing solutions, optimize the uptime of their equipment and furthermore improve the sustainability status of both their own retail organization and their suppliers' companies.

Most breakdowns or malfunctions are not caused by hardware failures. Instead, the root of the problem can often be found in either the device's computer system environment, in operating errors or in a faulty interface between the device and other units connected to it. Many such operating and software-based malfunctions can be rectified via remote services. It therefore makes sense to recognize remote access options as an essential aspect of any weighing, labeling and packaging solution installed today, both in terms of optimizing sustainability and from the perspective of maximizing uptime.

The METTLER TOLEDO InTouchSM Remote Services provide food retailers with a consistently uniform IT platform for classic remote services and remote device management. In contrast to classic remote service concepts, InTouchSM Remote Services from METTLER TOLEDO support a wider spectrum of services and offer additional control options via the remote activation functionality. Hence, InTouchSM Remote Services enable proactive monitoring of all equipment and high-performance remote management of devices, thus reducing the number of on-site service visits required. Remote service options enable such service visits, which contribute to a higher carbon footprint, to be reduced to the technically necessary minimum. METTLER TOLEDO InTouchSM Remote Services support remote monitoring, remote diagnosis, remote maintenance, remote support and data transmission options. METTLER TOLEDO InTouchSM Remote Services do not save or transmit any product, price or transaction-related data or any other internal data stored on the devices themselves. A separate white paper is available detailing the data protection concept and the integration of InTouchSM Remote Services into a company's data protection policy.⁷⁹

5. Best Practices

How can food retailers successfully push ahead with their commitment to sustainability? The checklist below provides a brief overview of various initiatives and measures which are currently proving effective for leading retailers. The examples of best practice in the checklist are intended to serve as a guideline, providing initial ideas for how a multitude of operational measures can help retailers to achieve their strategic sustainability objectives in practice.

5.1. Initiatives for Reducing Waste and for Recycling Raw Materials

- Recycling program for plastic bags and packaging
Inform consumers where transport and bulk packaging materials can be returned in order to reenter the recycling chain; promote the recycling message at the Point-of-Sale
- Encourage the reuse of shopping bags by offering incentives or money-off coupons, for example
- Use biodegradable packaging materials such as Earthcycle containers
- Wherever possible, avoid using equipment which contains environmentally harmful substances such as lead or mercury
Introduce a companywide ban on investments in equipment which contain environmentally harmful substances by including relevant criteria in corporate specifications and tendering documentation
- When purchasing new equipment, favor devices which contain preferred materials, have a long useful life and which can be recycled through existing channels
- Use locally available channels to recycle packaging materials which contain potentially useful components such as cardboard, paper, glass and aluminum
- Use labels made of a recyclable substrate
- Support community projects, such as by donating food products which are close to their use-by date yet still safe to local food banks
- Send spoiled and unsalable food products to biomass power plants for disposal
- Improve management of perishable goods by better monitoring of your sales and adjusting discounts to food condition – better sell it than throwing it away

5.2. Initiatives for Reducing Energy and Power Consumption

- Utilize natural daylight
Reduce power consumption by planning and designing store interiors to make artificial light sources superfluous
- Switch to energy-saving lighting
Gradually phase out artificial light sources and replace them with energy-saving alternatives
- Intelligent lighting
Use movement and daylight sensors to switch lights on and off in less-frequented aisles and areas, and to adjust light levels to actual needs
- Efficient control systems for facility management
Reduce energy and power consumption for heating, ventilation, air conditioning; implement a heat reclamation system
- Avoid energy and heat losses
Install covers for refrigerated and frozen displays, use doors to separate off refrigerated backroom areas; introduce climate-friendly concepts for heating, ventilation, and air conditioning, as well as for refrigerators for fresh and frozen products

- Energy-efficient repeat purchases
When replacing equipment, only invest in devices which can demonstrate a better energy balance, i.e. which achieve the same or better performance yet consume less power than their predecessors
- Utilize energy-saving modes
Analyze the existing situation as well as new opportunities for using various modes which will save energy without detracting from the system's availability or operating reliability; implement the option which offers optimum potential

5.3. Further Measures for Reducing the Carbon Footprint

- Avoid unnecessary transportation
Work with local manufacturers and suppliers if this can help to redress the carbon balance; manage inventory efficiently to prevent unnecessary stock deliveries
- Implement remote service concepts
Avoid unnecessary on-site service calls by allowing equipment and systems to be managed and maintained via remote monitoring, remote diagnosis and remote maintenance; this is an environmentally friendly approach since it reduces fossil fuel consumption and hence carbon emissions
- Assess equipment requirements (e.g. legal for trade) and define risk based approach for calibration, verification and service, using GWP

5.4. Initiatives at Branch/Local Level

- Sell locally grown products
Short transportation routes, high food safety levels, transparency and traceability 'from farm to fork'; involve and train employees with regard to regional marketing concepts and carry out regular audits
- Bisphenol-free labeling
Eliminate labels containing bisphenol from packaging for fresh meat, cooked meats and sausages, fish and seafood, bakery products and fresh produce as a precautionary measure to protect staff and consumers alike
- Sustainable approach to product range
Do not sell milk which contains artificial growth hormones (rBST); only sell fish and seafood that has been farmed using sustainable methods or caught from a sustainable source



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