MEETING REPORT

Meeting of the Retail Industry on Sustainable Development

4 November 2002

UNEP DTIE, Paris
This informal meeting of the Retail Industry on Sustainable Development was held on 4 November, 2002 at UNEP DTIE in Paris. The meeting involved international retailers and retail associations and resulted in a follow-up meeting and articles for a sector-specific issue of Industry and Environment. Participant presentations can be found online at www.uneptie.org/sustain/retail/retail.htm

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PURPOSE AND GOALS of the Meeting

The meeting was held to serve as a platform for dialogue for the industry, for UNEP to identify existing activities in the international retail industry and to learn from the experiences of key players.

The final agreement at the World Summit on Sustainable Development (WSSD) included calls to enhance corporate environmental and social responsibility and to change unsustainable consumption and production patterns. Therefore, UNEP wishes to extend its activities to the retail sector, which has an important role in achieving sustainable development through the producer-consumer link.

International retailers and associations working in both industrialised and developing countries were invited to the 4 November 2002 meeting. Ten participated, representing a diverse group working in food, clothing and other non-food retailing. (Please see List of Participants in the appendix, page 10.)

Goals of the Meeting:
- identify existing activities in industry associations and companies
- share and learn from experiences of key players
- pinpoint needs within the sector
- get feedback from the sector on how UNEP can facilitate further developments

BACKGROUND of Sustainability in the Retail Sector

Much is already being done in the sector in regards to sustainability. There is a long list of retailers involved in some sort of green or social-responsibility area. Within the companies themselves there are varying levels of commitment, ranging from providing recycling facilities to the more involved supply chain management. As the number of such programmes indicates, awareness within the sector on these topics is growing. An increasing number of retailers are publishing sustainability reports in addition to annual reports. However, the retail sector is a broad one, and different retailers have different problems in addressing sustainability. Some facts and figures on the global retail industry are highlighted in the appendix, page 12.
SUMMARY OF PRESENTATIONS AND DISCUSSION

Participants were asked to give informal, 15-minute presentations describing how their organisations pursue sustainability. Participants were also encouraged to talk about their sustainability objectives, what they see as obstacles to reaching these goals, and lessons they have learned. The following is a summary of the proceedings. For individual participant presentations, please see www.uneptie.org/sustain/retail/retail.htm

Retail Association Presentations

The representatives of two participating retail associations noted that the public, NGO’s and businesses all need to work together. They felt consumer education is important and noted that too many restrictions can burden SMEs. One association has advisory groups focusing on specific areas related to sustainable development and has plans to develop retailer-specific reporting indicators.

The British Retail Consortium (BRC) recently surveyed their members on sustainability reporting. BRC noted that ½ of survey respondents report on their company’s sustainability, and many would like help in reporting, especially in identifying a standard reporting model.

Company Participant Presentations

Participant presentations addressed a wide range of topics, including:

I. Internal: energy, water, chemicals, packaging and waste, transport, etc.
II. Influencing suppliers: activities in supply chain management on issues such as child labour, organic food, fair trade and labour conditions.
III. Influencing consumers and External relations: advertising and promotional activities, information and labelling, facilities for recycling and other services, reporting, etc.

I. Internal

Participants presented on environmental issues their companies are addressing including energy, water, chemicals, packaging and waste, transport, recycling and procurement. They also discussed the social ways in which the companies encourage sustainability internally, through employee benefits and training.

-Many corporations use a multi-stakeholder approach in their sustainable development programmes and several indicated they feel that social aspects and environmental aspects are both part of Corporate Responsibility. Life cycle assessment, environmental accounting, and the 3-pillar approach (economic, environmental and social) were all mentioned as systems used by the retailers.

-It was noted that decentralised companies face an added challenge because it can be difficult to draw common themes across the group. Some participants also were
interested in how they could ask their regional stores and centres to implement sustainable practices.

II. Influencing Suppliers

Through their work with suppliers, participants are addressing issues such as child labour, organic food, fair trade and labour conditions. Many companies have formed relations with suppliers in developing countries as well as within the communities local to their stores.

-There was discussion of the agreements some retailers have with their suppliers, and the evaluations and external audits which are sometimes used to follow-up on these agreements. Most participants said their companies concentrate these efforts on their immediate suppliers and expect these suppliers to maintain their goals further down the supply chain. There was some question on how far down the supply chain retailers should watch. One smaller retailer noted they have a small enough base that they can know all their suppliers throughout the supply chain. Many participants said if their companies find one of their suppliers out of compliance with social and environmental guidelines they have previously agreed to, their companies will work with the suppliers to help them improve their performance rather than immediately terminate the relationship.

-Some retailers have also launched their own products, and it was noted that this was the first time they had to pay attention to the responsibilities of supply chain. This also brought up the complication of competition amongst their products (selling their own brand as well as other brands).

Coop’s Viva line of products incorporates a range of organic, fair-trade and environmentally-friendly products and services. The company’s small base of suppliers allows Coop to know each supplier and monitor their activities. Sales have gone up and they are no longer niche-market products.

III. Influencing Consumers and External relations

The participants recognised the importance of communicating on their company’s activities in sustainability. This includes advertising and promotional activities, information and labelling, facilities for recycling and other services and reporting.

-One prime topic of discussion was the difficulty in communicating with the consumer: how to make the consumer understand the “why” behind what the retailers do to promote sustainable development. One retailer talked about the problems they have had in communicating the reasons why a change was made in bags supplied by the store. Other retailers have developed campaigns to communicate on their organic and local produce.
AHOLD placed signage in their stores to explain to customers the environmental reasons behind why the company was not selling a particular variety of fish.

- It was mentioned that various regions tend to view sustainability differently, for example in Switzerland it is seen as “quality” and in the U.S. it is seen as “healthy”. It was also stated that the price consumers will pay in regards to sustainable products depends on local conditions (for example the Swiss tend to buy for quality, whereas other countries tend to be more price-focused).

- Several participants noted their companies have been reporting on their social, environmental, CSR and sustainability progress for several years and others were just beginning to. The complexity of standards and the need for global standards were also discussed. Many participants noted that they use the guidelines of the Global Reporting Initiative (GRI) as a reference to their own environmental and social reports. There can also be additional challenges when dealing with the reporting guidelines of various governments.

- Some participants commented that they are faced with the need to make choices: to spend money on developing a reporting system, or to spend it on something closer to consumer’s hearts like social issues.

Roundtable discussion

In particular, three areas for future opportunities between UNEP and the sector emerged from the meeting’s discussion: in developing sector-specific indicators for reporting, in utilising UNEP’s global network for work with developing countries and in facilitating consumer and NGO dialogue.

Reporting

- Develop indicators (It was suggested UNEP and the BRC, who is currently developing efforts to look at indicators for the retail sector work together.)
- Revise the GRI

Global Co-operation

- Facilitate work with organisations in developing countries
- Facilitate the monitoring of supply chains

Consumer and NGO Involvement

- Offer advice on how to communicate with the consumer
- Provide an open dialogue amongst the sector, NGOs and consumer organisations.
• Participants were also interested in creating “emotional” communications to consumers and getting, in consumer’s terms, what they expect from retailers.

There was discussion that there should be additional activities between UNEP and the sector after the November meeting, but many participants stated they were already doing a lot of work with groups in the area of sustainable development and CSR and encouraged UNEP to involve or join forces with existing initiatives. It was said there is a need to define concrete activities and objectives and UNEP was encouraged to try to incorporate more retailers from other parts of the world.

There was interest in participating in a stakeholder dialogue involving consumers groups, NGOs and the Global Reporting Initiative. There could be possibilities to link up with UNEP’s Life-Cycle Initiative, UNEP’s Advertising and Communication Forum, and consumers groups for joint meetings.
NEXT STEPS for UNEP

Industry and Environment
As a follow-up to this meeting, the April 2003 issue of UNEP’s quarterly publication, “Industry and Environment” (Vol.26, No.1) will be devoted to retail-specific challenges in promoting sustainability and including articles based on selected presentations.

Subsequent Meeting
As an outcome of the 4 November meeting, another meeting will be organised to link the global retail industry (expanding upon the participants of the 4 November meeting) with international consumers groups, the Global Reporting Initiative (GRI) and UNEP’s Advertising and Communication Forum. This 2-day meeting will provide the opportunity for dialogue between the retail sector, consumers, the communication sector and NGOs. The meeting will include global representation.

EVALUATION by Participants
Written evaluation on the meeting from participants indicated a general appreciation of the opportunity to learn from the experiences of other retailers. Most participants found the meeting useful, and indicated they would like to have more time for discussion in the future.
Agenda: Retail Industry Meeting on Sustainable Development

Date: Monday, 4 November 2002
Time: 9:30 a.m. to 5:00 p.m.
Venue: UNEP Paris

**Morning Session**

9:30-10:00 Welcome and Introduction to UNEP and objectives of the meeting:
Ms. Jacqueline Aloisi de Larderel, Assistant Executive Director, UNEP, Director, UNEP DTIE

10:00-10:45 Sharing experiences: participant presentations
- Mr. Xavier Durieu, Secretary General, EuroCommerce (European Union)
- Mr. Nigel Smith, Director of Environmental Policy, British Retail Consortium (United Kingdom)

10:45-11:15 Coffee break

11:15-1:00 Sharing experiences (continued)
- Ms. Nicola Ellen, Strategy Manager, CSR, Safeway (United Kingdom)
- Mr. Paul Rowsome, Responsible Environment, Carrefour (France)
- Ms. Stephanie Levet, Director of External Relations & Sustainable Development, Monoprix (France)
- Mr. Minoru Inaoka, Director, External Relations Office, Ito-Yokado (Japan)
- Mr. Casper Van Zijl, Acting Director, Corporate Social Responsibility, AHOVL (Netherlands)

1:00-2:00 Lunch at UNEP

**Afternoon Session**

2:00-3:30 Sharing experiences (continued)
- Mr. Jouko Kuisma, Senior Advisor, Corporate Responsibility, Kesko (Finland)
- Mr. Thomas Kamm, Vice President, Corporate Affairs, Pinault, Printemps-Redoute (France)
- Ms. Brigitte Zogg, Communication and environment, CO-OP (Switzerland)
- Mr. Mike Barry, Environmental Systems Manager, Marks & Spencer (United Kingdom)

3:30-3:45 Coffee break

3:45-5:00 Next steps: further co-operation between UNEP and the retail industry.
Invited Organisations and Companies

Ahold
Auchan
B&Q
Boots
Carrefour
Central Retail Company
Co-op
Grupo Pao de Acucar
Grupo Sanborns
H&M
IKEA
InterGamma
Ito Yokado
Kesko
Kingfisher
Marks & Spencer
Metro AG
Migros
Monoprix
Pick n’Pay
PPR Group
Safeway
Sainsbury
Target
Tesco
Walmart

BRC (British Retail Consortium)
EuroCommerce
IADS (International Association of Department Stores)
NRF (National Retail Federation)
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Global industry-related facts:
- Worldwide retail sales are estimated at $7 trillion (USD).
- The top 200 largest retailers account for 30% of worldwide demand.
- The money spent on household consumption worldwide increased 68% between 1980 and 1998.
- Retail sales are generally driven by people’s ability (disposable income) and willingness (consumer confidence) to buy.
- Approximately 2,000 companies voluntarily report on their economic, environmental and social policies, practices and performance.
- The 1998 UNDP Human Development Report points to the fact that advertising has global expenditures (including in developing countries) increasing faster than the world economy, suggesting that the sector is becoming one of the major players in the development process.
- An Arthur D. Little survey of 481 executives worldwide published in 1999 found that 95% of managers believed that sustainable development offered real business value and 75% said that companies would have to make the required adjustments in vision and strategy. But only 19% said that their companies were “well down the road” in making such changes.

Regional retail industry facts:
- Some two-thirds or $6.6 trillion out of the $10 trillion American economy is consumer spending. About 40% of that ($3 trillion) is spending on discretionary products and services.
- Retail turnover in the EU was almost €2,000 billion in 2001 and the sector’s better than average growth looks set to continue in the future.
- Retail trade in Europe employs 15% of the European workforce (3 million firms and 13 million workers)
- The Asian economies (excluding Japan) are expected to have 6% growth rates in 2005-6.
- US retail CEOs and senior executives are not very optimistic about the short-term future, according to the results of the NRF-BTM (National Retail Federation-Bank of Tokyo-Mitsubishi) Retail Executive Opinion Survey, a new monthly survey that indexes key aspects of industry operations. According to this survey, despite price-cutting, customer traffic still falls below normal levels, however of customers that are buying, it appears they are spending more per transaction.
- Positive forces at work in the retail consumer market today (by Plunkett Research, Ltd 2001-2002) include a high rate of personal expenditures, low interest rates, low unemployment and very low inflation. Negative factors which hold retail sales back include weakening consumer confidence, slowly increasing unemployment, growing numbers of store closings, decreasing levels of consumer household wealth due to stock portfolios and 401k plans that have seen huge losses in the past year, consumers with record high debt levels are defaulting on credit card balances at an alarming rate, volatility in global markets and significant continued layoffs at larger corporations require job migration and lead to large numbers of consumers employed as temp workers.
Consumers Expectations and Consumption Figures:
- Time and quality of life are becoming relatively more important than money; 60% of Americans want to simplify their lives.
- Product performance was found to be the top purchasing criterion, while environmental features were a close second in a survey performed by the alliance for Environmental Innovation in conjunction with SC Johnson Wax.
- The total of United States-managed investment assets grew 22% from 1999 to 2001; socially screened assets under professional management grew by 36% in the same period, suggesting the growing importance of social issues in investment.
- Consumers are becoming more purposeful in their buying behaviour according to a 2001 Ernst & Young paper. Another change in the retail industry is a drop in the number of casual shoppers in department stores and malls.
- “An overwhelming majority [of PR professionals] believe that clients tend to underestimate the importance of PR/Communications in CSR.” According to a 2001 survey.

Global Consumption Facts and Figures:
- The world’s population is poised to expand 50% by 2050. The world is currently 78% poor, 11% middle income and 11% rich.
- World economic output more than doubled in the past 25 years, to about $33 trillion USD by 1999.
- The number of NGOs recorded by the Union of International Associations has more than doubled since 1985 and is now over 40,000 organisations, indicating a growing interest in social and environmental issues.
UNEP DTIE

The mission of the United Nations Environment Programme, Division of Technology, Industry and Economics is to encourage decision makers in government, local authorities and industry to develop and adopt policies, strategies and practices that are cleaner and safer, make efficient use of natural resources, ensure environmentally sound management of chemicals, reduce pollution and risks for humans and the environment, enable implementation of conventions and international agreements, and incorporate environmental costs.

The UNEP DTIE strategy involves influencing decision making through partnerships with other international organisations, government authorities, business and industry, and non-governmental organisations; facilitating knowledge management through networks; supporting the implementation of conventions; and working through UNEP regional offices.

Sustainable Consumption

UNEP's SC programme started in 1998 and its primary objective is to explore underlying needs of consumption patterns, both in developed as developing countries, and to use these as sources of innovation for business, governments and NGO's. The program currently includes the Life-Cycle Initiative, Youth Initiative, Advertising and Communication Forum, Regional Initiative and Green Procurement.