

ABSTRACT

The business approach to Sustainable Consumption traditionally focuses on creating niche markets for sustainable products that are aimed at 'green consumers'. However, the idea of green consumerism places too much emphasis on individuals to transform their purchasing habits on a purely ethical platform, when in fact price incentives, quality, habit, time constraints, culture and a whole host of other factors dictate consumption choices. Choice editing for sustainability - eliminating the option of buying products with a poor environmental or social record - is one progressive strategy taken by retailers that does not rely on consumer behaviour change, but instead mainstreams sustainable products as default options. Removing products on the basis of sustainability brings into light difficult questions surrounding the responsibility and willingness of retailers to limit free and autonomous consumer choice. To investigate how and why this 'less-is-more' strategy is being used by food retailers in Europe, the drivers, barriers and enabling factors for the choice editing of fish are investigated through an exploratory study. The findings suggest that creating a responsible brand image provides the main 'business case for choice editing', but this ultimately still relies on consumer recognition of sustainability issues as valuable. Pro-active retailers are driving the sector forward in removing unsustainable products from the shelves, but greater responsibility for actively intervening into matters of consumer choice needs to be taken by governments in the form of fiscal incentives and product standards. Underlying this is a need for clearer indicators that go beyond current labeling schemes with regards to complex, product-specific issues. NGOs and the media play a critical role in enabling choice editing by their ability to induce 'social unacceptability' with regards to purchasing unsustainable products such as endangered species of fish.

Key Words: Choice Editing, Sustainable Consumption and Production, Sustainable Products, Retailers, Consumer Choice, Civil Society.

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List of Abbreviations

CFP	Common Fisheries Policy
CSR	Corporate Social Responsibility
EU	European Union
FSC	Forest Stewardship Council
ICES	International Council for the Exploration of the Sea
MCS	Marine Conservation Society
MSC	Marine Stewardship Council
SCP	Sustainable Consumption and Production
SCR	Sustainable Consumption Roundtable
SDC	Sustainable Development Commission
SWOT	Strengths, Weaknesses, Opportunities and Threats
WBCSD	World Business Council for Sustainable Development
WWF	Worldwide Fund for Nature
VOC	Volatile Organic Compound

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1 Introduction

1.1 Problem Definition

Consumption – in its most basic sense, the using up of natural resources – is a significant driver for the high levels of environmental degradation that characterize modern-day life. Up to 60% of the Earth's ecosystem services have been degraded in the last 50 years and anthropogenic pressure on the earth may have caused us to transgress three of our planets' natural boundaries beyond which humanity cannot operate safely (WBCSD, 2008; Rockstrom et al, 2009). To meet the challenges of sustainable development¹, the capability for life to flourish on earth now and in the future, we will need to transition to more sustainable levels of consumption (NEF, 2009).

There is in particular a need to reduce the vast ecological footprint associated with food – a biological necessity for life, it is responsible for nearly a third of the negative impacts associated with household consumption (Tukker et al., 2007). How can we ensure that the global system of food provision stays within ecological limits of the planet while at the same time providing adequate safe, healthy and nutritious food for a growing population? How should this system be regulated, and by whom? These questions will serve to frame the discourse for the following analysis.

Consumption policy is traditionally focused on the autonomous individual, whose choices in the market represent an act of decision making with regards to their individual needs and desires, reflecting a range of issues from price and quality to aspirations and identity (Hurth, 2010; Ropke, 1999; Sanne, 2002). Implicitly, sustainable consumption therefore means the consumer taking on responsibility to embrace the issues of sustainability as the primary factor in decision-making. However, the complexity of information required to make a judgment on product sustainability can leave even the most dedicated green consumer confused and disempowered, and consumers are not generally aware that Government and retailers are often delegating to them the responsibility of choosing society's way out of unsustainability (Owen, 2007; Sustainable Consumption Roundtable, 2006c).

The power of food retailers in the developed world means they have become the key force shaping the commodity chains and global production-consumption systems that represent the food that ends up on our tables (Tukker et al, 2010). Retailers can help millions of consumers to make straightforward, affordable and more sustainable choices and as the retail sector becomes more concentrated, the potential grows for an effective entry

¹ There is significant debate in the field of sustainability science as to the definition of 'sustainable development'. Much argument rests on what, exactly, is to be sustained for the future: views from anthropocentric (humans only) to eco-centric (life itself), with social concerns ranging from zero to complete equality. Hopwood et al (2005) give a comprehensive overview to the arguments surrounding this slippery concept through mapping the mainstream approaches to sustainable development. As the focus of the thesis is on sustainable consumption, the definition of sustainable development used refers to the ecological economics approach taken by Costanza and Wainger (1991), who define sustainable development as '*The amount of consumption that can be sustained indefinitely without degrading capital stocks, including natural capital stocks*'.

point for policy intervention (Forum for the Future, 2009; Danish Ministry for the Environment, 2011). However, the retail system thrives on growth and profit from increasing throughput of natural resources, and the ability of retailers to both satisfy and stimulate demand through advanced consumer manipulation tactics (Lebel, 2005). The goal of the retailer is ultimately to create profit, not to protect ecosystems from critical damage nor to provide meaningful work for those employed in the long commodity chains under their control (ibid). Large supermarket chains certainly have the power to influence what and how we consume, but their willingness to shape consumer choices in order to promote sustainable items – or to remove the need, desire or possibility to consume unsustainable items - is an agenda that appears to clash with their profit seeking motives.

That said, it is unusual that ‘Choice-editing’ - the voluntary removal of unsustainable and unnecessarily damaging products, ingredients or components on behalf of consumers – has become ‘an increasingly important strategy among large retailers’ (ETC/SCP, 2010). Choice editing is not a new initiative: retailers make choices on behalf consumers all the time by choosing to offer certain products or services and not others. For decades, retailers and governments have used choice editing to promote a narrow view of progress, with mass consumption of energy intensive and resource depleting products becoming the foundation of human happiness, egalitarianism and democracy (Maniates, 2010). However, attention has shifted to harnessing the use of choice editing as a way of promoting products which have been produced in a less environmentally and socially damaging fashion than conventional, global mass-production (e.g. SCR, 2006a; SCR 2006b; Mainates, 2010; Lang, 2010; ETC/SCP, 2010; Moisander et al, 2010).

The argument for choice editing is that in a sustainable society, eco-friendly choices should not be difficult to make, rather the sustainable choice should be the default choice, the path of least resistance (Maniates, 2010). Consumers benefit from the assurance that the issues they care about are being dealt with upstream, rather than facing the demand that they grapple with those complexities themselves (SCR, 2006b). Governments have a key role in aiding the practice of choice editing by introducing outright bans or timescales for the elimination of a product or service; they edit citizen’s choices through laws, taxes and subsidies.

The promotion of choice editing as a policy tool could, however, be viewed as a potential limitation to consumer sovereignty and autonomy, infringing on the individual right to consumption (Hobson, 2004). It raises what Maniates (2010) considers ‘prickly’ philosophical questions: Should products be removed from the menu of consumer choice because of their environmental or socially objectionable qualities? Who decides what stays on the shelves and what goes? Shouldn’t the consumer be allowed to choose freely?

Business suffers from the inherent constraint that social and ecological concerns are limited by the need for short-term capital returns. Most sustainability interventions by retailers rest on practical but essentially negative outcomes in the frame of ‘weak sustainable consumption’ or ‘green consumerism’ (Fuchs and Lorek, 2002; Banerjee, 2002). Could there,

however, be a business case for sustainable consumption in which voluntary environmental regulation in the form of choice editing creates competitive advantage whilst at the same time reduces overall resource inputs?

Drawing on literature from the fields of environmental management, consumer theory, sustainable consumption and production and corporate social responsibility, the purpose of this thesis is to understand and evaluate how retailers view the potential of choice editing as a tool to promote sustainable consumption by mainstreaming sustainable products, in particular focusing on their willingness to intervene in matters of consumer choice based on sustainability or ethical implications. This work responds to the challenge of Kearins (2005:3) who argues that more scholars should rise to the task of synthesising lessons from many disciplines to nurture a serious discussion of the potential for strong sustainability that could be fostered by organisations.

1.2 Research Questions

The thesis will attempt to answer the following research questions:

- 1. Why should retailers actively structure consumer choice by choice editing their product assortment for sustainability purposes?**
- 2. How can retailers use choice editing to mainstream sustainable products?**
 - What is the business case for choice editing?
 - How do retailers deal with the idea of voluntarily restricting consumer choice and autonomy?

1.3 Methodology

The vanguard of choice editing as a useful policy tool by various organisations ²implies that it is an important topic for research. However, this interest has not yet trickled down into the development of theories with regards to choice editing within the academic literature. Additionally, there has been fairly little research conducted on corporations within the food-retailing sector, thus they are a critical but poorly understood part of the food chain (Blay-Palmer, 2008). For these reasons, this thesis takes an inductive and exploratory approach to the problem. It aims to move beyond interdisciplinary thinking, into the realm of a 'trans-disciplinary' analysis of the effectiveness of choice editing as a policy approach to making sustainable consumption easier (Bansal and Kilbourne, 2001).

Exploratory studies seek to explore what is happening in the real world, to ask questions about it, and to decide whether it is worth researching further. They analyse a wide range of themes that later can be assessed for importance and potential for further study (Ryan and Bernard, 2003) These studies are

² For example, the Sustainable Development Commission, the Worldwatch Institute, the World Business Council for Sustainable Development, and by various EU governmental departments.

particularly useful when not enough is known about a phenomenon, as is the case with choice editing (Saunders, Lewis and Thornhill, 2007). Inductive studies start with investigating real world phenomena before generating theories from the observed data. The research takes a perspective of critical realism: reality can be found 'out there', however uncovering deeper social reality requires qualitative enquiry (Gray, 2009). The world is too complex to be reduced to a set of observable natural laws, and generalisability is less important here than understanding the real workings behind events occurring in reality (ibid.).

The qualitative study was used to obtain primary empirical data from retailers through the use of interviews. To increase the reliability of data generated from using an inductive approach, multiple retailers were consulted, thus ensuring conclusions were not simply based on singular observations. Nineteen supermarket chains were approached of which seven agreed to participate in the study. Retailers were originally chosen according to their market share, with the assumption that the larger the retailer, the more control and power they have to affect consumption and production patterns, these being the places where choice editing could have the largest impact if implemented. Retailers were also chosen according to their target market(s), with the aim of covering all retail segments from the cheaper discount stores, to the middle range supermarkets, up to the higher range and more expensive stores. The cases were finally chosen due to the positive response of the participant, thus the research design was 'emergent', changing in response to data and time limitations.

The seven cases each represent an in-depth interview lasting from 30 minutes to one hour with a key respondent (see Appendix 1 and 2 for a list of interviewees and overview of companies). Interviews were conducted at the corporate level with experts working directly with policy issues regarding supply chain management and sustainability within the retail sector. Interview questions (available in Appendix 3) concerned drivers, barriers and enabling factors for choice editing and were sent to the interviewees before the interview. The example of fish was used as a basis for questions on a product category that has undergone fairly widespread choice editing. The interviews were semi-structured; an interview guide was used to steer the interviews and a number of 'fixed' questions were asked to all interviewees to allow for comparison of the data. However when individual themes arose in the interviews relevant the topic, they were also investigated on a case-by-case basis. One retailer chose to answer the interview questions by e-mail due to time constraints. After the interviews were conducted, they were transcribed and coded to discern any patterns, consistencies and meanings that suggested relationships between variables and could then be used to construct generalisations and relationships (Gray, 2009).

1.4 Limitations and Scope

Qualitative research is, to some degree, always somewhat subjective in the approach and analysis to data (Miles and Huberman, 1994). To counteract this and to try to increase reliability of the data, a research diary was kept throughout the research process to record the process of thinking and to attempt to develop a reflexive stance. Verification of answers was used in the

interviews as participants' answers were repeated back to them and data on endangered species of fish was checked for reliability by triangulation, checking the respondents' answers with CSR reports, data about the product assortment online and in some cases by checking in the stores themselves.

Language can be considered a limitation to the study: interviews were conducted in English; hence this could have potentially resulted in miscommunication with the Swedish retailers.

This research is only concerned with the negative impacts associated with the products sold by a retailer. There are, of course, very many other substantial sustainability issues connected with retailer operations (see: Figure 2) but considering these issues is outside of the scope of the thesis.

The thesis has a Eurocentric bias: the findings are somewhat context bound and the generalizability of the results applies only to supermarkets within the rest of Europe. The management and market structures for food retailers in the EU are similarly structured and highly concentrated in most countries thus results can to a certain extent be generalized to companies operating in other Western European countries (Vorley, 2007). However there is acknowledgement that each individual country has differing governance structures, education systems and cultures around consumption and food that may also affect consumption patterns and the availability and potential for choice editing to be used.

Finally, some authors advocate that the only truly sustainable food regime is one that operates at a local scale, with decentralized food production and distribution systems, the antithesis of the large retail model (see, for example, Shiva, 2000; CorporateWatch, 2008). While there is certainly weight to these arguments, real-world trends point to supermarkets gaining increasing dominance and share on the world market (Lang, 2003). Working on the assumption that the current trend of market concentration in the food retail sector will continue into the future (Timmer, 2008), this research is focused on improving the current structure and market based system of food provisioning, rather than advocating a radically different system that would most likely also demand large scale changes in political and economic structures to become feasible.

1.5 Intended Audience

Primarily, the findings will be useful for those working within retailers on sustainability and supply chain issues. The findings will also be relevant for those dealing with the formation of national and international policy in sustainable consumption, both in the public and private sectors. By understanding the potential and limitations of choice editing to be used by business, policy makers can more effectively control product-based regulation with regards to sustainability issues.

The findings will also be relevant to civil society groups, especially those working with marine conservation. Consumer groups and those interested in sustainable consumption may also benefit from an understanding of the

'limits' of choice editing as well as an overview of how some of the different retailers are currently operating with regards to sustainable products.

1.6 Outline

Chapter 1 introduces the problems associated with choice editing that will be explored in this research. Research questions are posed and the methodology used to collect data is described. It identifies research limitations, provides a thesis outline and describes the audience for which this research may be useful.

In Chapter 2, an overview of the main actors in Sustainable Consumption and Production (SCP) policy are presented, before a short summary of the food retail sector in the EU.

Chapter 3 introduces issues relating to consumer choice and presents a more thorough analysis of the retailer-consumer relationship. Three models of consumer choice are developed from the literature, and an analytical framework used for data analysis is presented.

Chapter 4 presents the case and findings of the empirical study on fish.

Chapter 5 analyses the findings of the study through the framework of key drivers, barriers and enabling factors developed in Chapter 3.

Chapter 6 discusses these findings and makes recommendations in light of the broader literature and policy framework surrounding sustainable consumption, the role of business and framing of consumer choice.

Chapter 7 summarises the main findings and lessons learned in the course of this research, highlights main research contributions and provides suggestions for further research.

2 The Food Retail Sector

2.1 Sustainable Products

The workings of the global food provisioning system are complex and environmental degradation and social inequalities occur throughout food production, manufacturing, distribution, retailing, consumption and disposal. Food supply chains are increasingly globalized; seasonality and regionalism have lost importance, whilst there is a tendency towards increasing consumption of highly processed and manufactured foods (Marshall, 2001). Sumberg (2009) dubs this ‘cheap food disease’, which manifests itself through labour exploitation, environmental degradation and diet-related ill health.

Consuming better food means lowering the negative environmental and social impact of products. Sustainable products include organic, fair trade, eco-labelled, local, in season, humanely reared and vegetarian options. Vegetarians and consumers who eat locally harvested, seasonal, or organic foods *generally* have lower impacts than those who rely on more customary meat based ‘western’ diets, although it is important to point out that issues such as ‘food miles’ and ‘carbon footprints’, even when product specific, are rarely clear-cut³ (Tukker et al., 2010). In this context, it is perhaps easier to outline products widely considered to be unsustainable⁴: carbon intensive items such as meat and dairy, endangered species of fish, intensively farmed, air freighted produce, items with negative animal welfare issues (such as battery caged eggs) and highly manufactured and processed items containing high fat, salt and sugar content (FAO, 2006; Sumberg, 2009; Pollan, 2006). For the purpose of this thesis, the definition of ‘sustainable food products’ is derived from the New Economics Foundation’s definition of sustainable food, “food associated with high levels of well-being, social justice, environmental stewardship and system resilience” (Sumberg, 2009).

With regards to promoting the consumption of more sustainable products, there are three major agents of change to existing consumption patterns: People, Government and Business (SCR, 2006a; Tukker, 2006). In reality, the three change domains do not work in isolation from each other but as dynamic system with multiple feedback loops, reacting to initiatives and changes throughout the system and from the wider norms and values in society. The relationship between these change agents is shown in the ‘Triangle of Change for SCP’ presented in Figure 1.

³ For example, there is debate as to whether it is better to promote locally grown food that protects local interests and domestic markets and minimizes greenhouse gas emissions – or whether it is better to import food from overseas, due to the role of agricultural exports in alleviating poverty of farmers and suppliers in less developed countries (Rae Chi, MacGregor and King, 2010; Watkiss et al, 2005).

⁴ This relates only to a European or developed world context, the idea of sustainable and unsustainable food in the developing world would be exceedingly different due to calorie needs and issues of access and availability.

Figure one: the 'triangle of change'

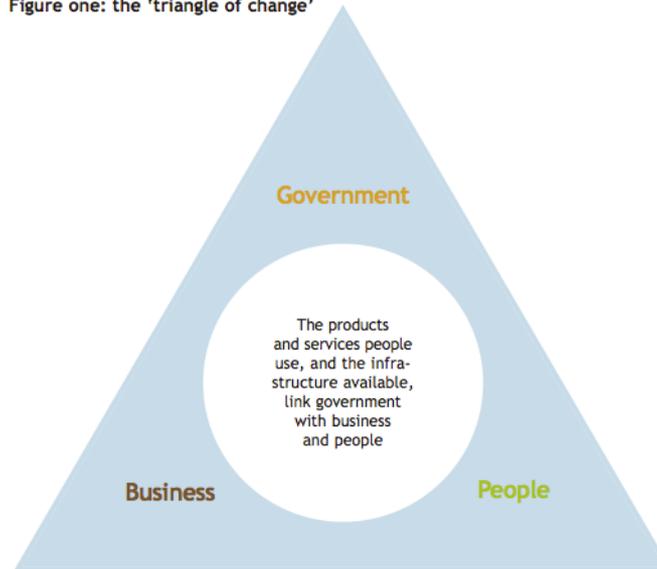


Figure 1: Triangle of Change for SCP. Source: Sustainable Consumption Roundtable (2006a)

2.2 Industry Overview

The last half-century has been a period of unprecedented and rapid change in the food system (Lang, 2003). The food retail sector is highly economically concentrated and large retailers are getting larger, while the small are rapidly losing out in market share: in the UK, the largest four chains control over 70% of the market (SDC, 2008; CorporateWatch 2008) Increasing market concentration is not due to competitive advantage from superior products or consumer appeal, but as a result of buy-outs, mergers and acquisitions (Lang, 2003). The trend for European retail operating models is thus changing from a national to a pan-European, multinational approach, with large corporate takeovers of food provision occurring rapidly in the last few years in Eastern European countries (ETC/SCP, 2010). This concentration has given large food retailers greater power over producers and suppliers while at the same time their interface with consumers allows them to develop sophisticated marketing and brand loyalty strategies as a result of detailed consumer monitoring (Durieu, 2003; Jones et al, 2009). These shifts mean that the sector is characterized by a structure of oligopsony, consisting of a large number of (often global) suppliers to a small number of very powerful retailers (Harvey, 2007). Supermarkets are adept at avoiding strict governmental regulation and generally only adhere to private production standards (Blythman, 2005).

This means that retailers have become the largest business actor in the modern food system and represent a crucial link between suppliers upstream and consumers downstream. With amassing vertical integration, supermarkets are no longer passive food distributors but act as orchestrators and conductors between producers and end markets (Burch and Lawrence, 2007). Supermarkets have gained a stronger hand in shaping the food system than manufacturers, who traditionally ruled the sector and were the focus of food policy (Timmer, 2009). This is due to a surge in own brand products that

give supermarkets the capacity to control and make profit along their whole supply chain as opposed to simply at the point of sale. Private label goods make up 25% share of the global food market and it has been estimated that this will rise to 50% by 2025: some supermarkets sell only own-label products (Schreijen, 2011).

The manufacturing and purchasing clout of retailers is one of the most powerful drivers in influencing the market for sustainable goods, since retailers are able to specify standards of performance to a much greater extent than individual consumers (Almaani et al, 2004). They can encourage sustainable production methods through private governance, whilst simultaneously influencing consumer purchasing decisions, use and disposal of products.

From the retailer’s perspective, possible sustainability initiatives can be divided into three categories:

1. **What retailers choose to sell and how it is produced:** upstream activities in the product chain,
2. **How retailers sell:** in-store activities,
3. **How retailers communicate with consumers:** downstream activities in the product chain.

Examples of strategic initiatives that retailers take upstream, downstream and in-store are shown in Figure 2.

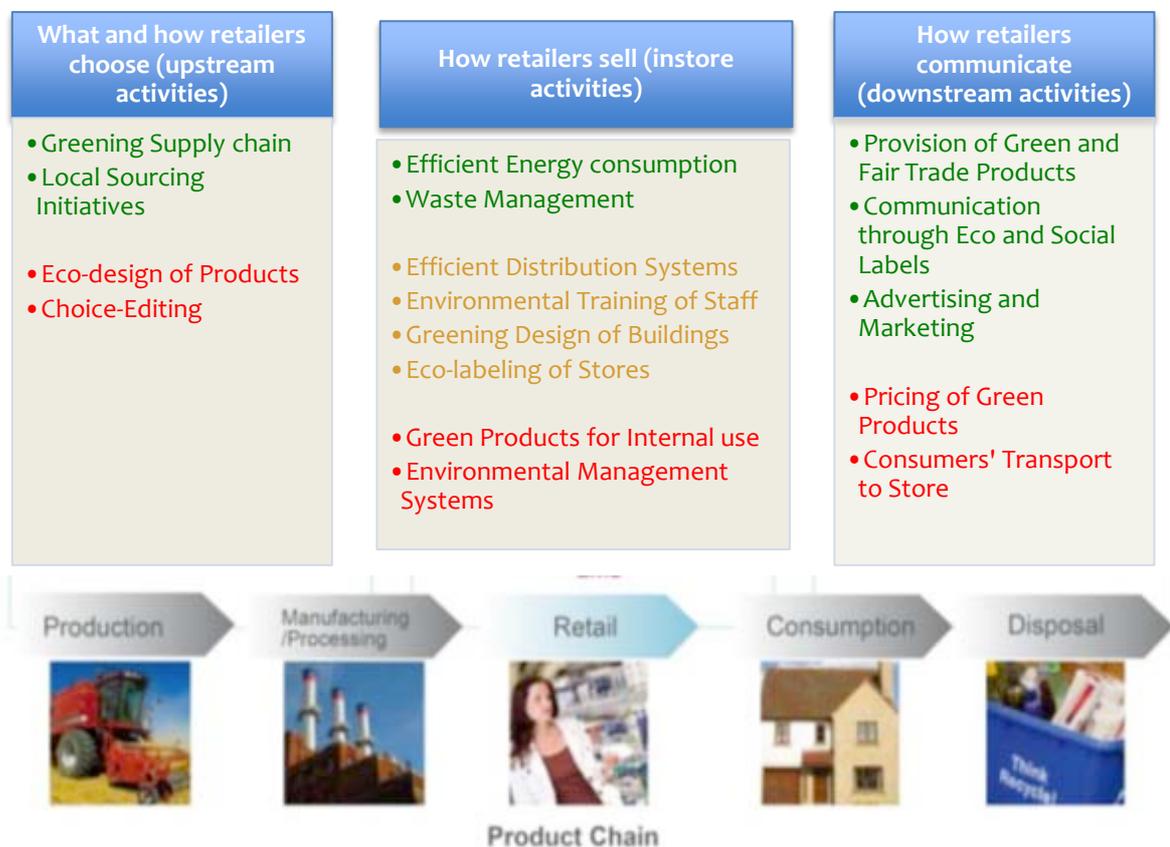


Figure 2: Sustainability actions within the supply chains of European food retailers. Source: ETC/SCP (2010)

The product assortment sold by a retailer is the basis for a considerable amount of environmental and social impact. Product assortments are shaped by competing interests including the retailer themselves, their suppliers, manufacturers, workers, consumers and public authorities. The range of each individual store is tailored to match the profile of consumer lifestyles and anticipated food preferences within the catchment area, representing a considerable investment in national market knowledge (Harvey, 2007).

The traditional supermarket business model competed by selling a high volume of low priced goods. Many supermarkets still compete on these terms, however, now more retailers are embracing a wider price-quality differential in their range of products (Burch and Lawrence, 2007). Tischner et al. (2010) point out that some supermarkets have begun to compete in terms of quality due to a realisation that continually lowering prices is not a sustainable long-term business strategy. Creating product differentiation, innovation and a positive brand image through high quality products leads to a close customer relationship which, in turn, leads to competitive edge and market success. Sustainable products can be seen as included in this range of products that compete on their perceived quality rather than price. The ethical food market grew 62% between 2002 – 2006 and in 2003 the organic market in Europe is estimated as worth 10 – 11 billion Euros (ETC/SCP, 2010). This is seemingly indicative of a trend where more and more so-called 'ethical' or 'green' consumers are willing to put environmental and social quality ahead of price as the primary factor in their purchasing decisions.

3 The Retailer-Consumer Relationship

This section discusses why the issue of consumer choice is an important but underprivileged topic in connection to sustainable consumption. To investigate how retailers mould consumer choices in order to promote sustainable products, three models of consumer choice are developed to represent the retailer – consumer relationship. These are choice provision, choice editing and choice architecture and are summarized in Figure 3.

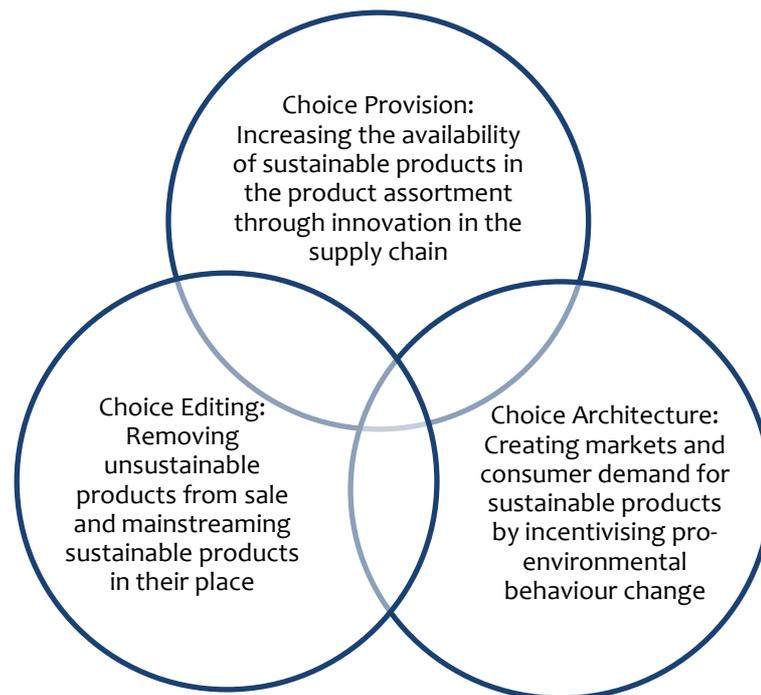


Figure 3: Synthesis of Choice Models

3.1 Consumer Choice and Sovereignty

The ability of the individual to choose between differing options pertaining to their life has come to be a major mark of 'progress', indicating the autonomy of the individual. Choice has been a symbol of mans freedom since the Enlightenment. For citizens, choice means democracy: the freedom to have ones voice heard in a fair and equal society. It is this ideal of individual liberty that our laws and political institutions have been designed to protect. The opposite of choice is repression, authoritarianism, tyranny and despotism (Salecl, 2010). Rightly or wrongly, within the liberal, free-market capitalist system, the idea of choice synonymous with freedom is extended to our economic life - as consumers, we expect the same amount of choice available to us as we do in other spheres of life. '*Give the consumer choice, they know best*' has come to be the retailing mantra of the modern world (Hickman, 2007). The need for consumer choice explains why the average supermarket stocked 2000 product lines in the 1960s, 15000 in 2006, whilst now some sell

up to 40,000⁵ and more (UNEP, 2006; Schwartz, 2003; Which, 2005). The basic idea is that consumer choice allows people to express their sovereignty (Schwartz, 2003).

The traditional economic model of choice – rational choice theory - starts from the premise of an isolated, rational individual making a ‘free’ choice based on complete knowledge and unlimited time to shop (Clarke et al, 2004; Ariely, 2009). This rational model of consumption reduces purchasing decision to a simple monetary exchange, assuming that value for money (price in relation to quality) is what drives consumers, maximising their wellbeing from a utilitarian perspective. However, this approach ignores both the irrationality of individual actors (see for example Ariely, 2009; Michel-Kerjan and Slovic, 2010), as well as the influence of the social and cultural context within which decisions are made (Esbjerg and Bech-Larsen, 2009). Economics makes a basic distinction between consumers driven by price and citizens driven by values, but our dual identities as citizens and consumers in a capitalist society are inevitably entwined (Partridge, 2003)⁶.

A lack of choice can be disconcerting and demoralizing, whereas a large array of choice allows consumers the opportunity to express themselves in a ‘democratic’ fashion via the market. Choice is closely linked to identity and for the consumer provides a way of positioning themselves amongst others by articulating their lifestyle and aspirations (Hurth, 2010; Strannegard and Dobers, 2010). This has been well-recognized by retailers who see their job as “providing solutions” to people's lifestyle-induced problems by providing a wide range of different retail formats and goods (Clarke et al., 2004). Retail stores are the spaces within which consumer choice is constructed and bounded: physically, by the choice of products that a consumer can or cannot buy; materially, by the price of these products; and symbolically, by creating meaning and identity for the consumer.

3.2 The Traditional Model: The Retailer As A Choice Provider

The retailer, viewed as a ‘choice provider’ follows a traditional, demand-side consumption model, shown in Figure 4. Retailers occupy a passive middle position, responding solely to market demand and receiving and passing on products from producers to consumers (Gilbert, 1999). Individuals and their demands (translated into purchasing data) are the agents of change, therefore to promote sustainable consumption retailers only need to provide a choice of sustainable products alongside the normal product assortment, allowing consumers to act ‘ethically’ if they so choose. This is the traditional model of green consumerism that relies on a niche market of consumers, who are willing to pay extra for ‘green’ goods that have added value or quality due to their environmental or social benefits (Pedersen and Neergard, 2005; Eriksson, 2004).

⁵ Tesco, as an example, stock 38 different varieties of milk including low-cholesterol, lactose-free, omega 3 enriched, locally sourced, soya, flavoured, and goats milk (Garavelli and Gunning, 2009).

⁶ The line between citizen and consumer is blurry, with some people arguing that we are shifting from a society of political citizens ruled by nation-states, to consumers in a corporate-driven globalized world (e.g. Elliott, 1982).

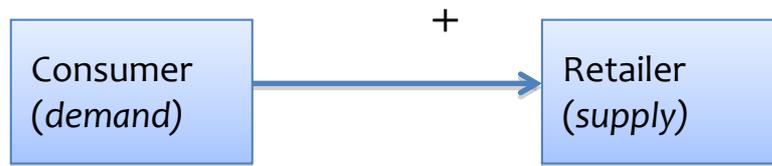


Figure 4: The Choice Provider Model. Retailers provide products based on consumer demand

By providing sustainable products along their mainstream products, retailers promote a green image whilst at the same time do not disrupt the attractive idea of uninfluenced consumer autonomy. Most product based sustainability work for the retailer as a choice provider rests on innovation in product design and supply chain management. Providing sustainable choices in this sense epitomizes a bottom-up, productionist focus (Lang, 2010).

The demand driven model of provision belies the fact that choices are always bound by a socio-technical framework (Ropke, 1999). The conventional structure of supermarket, which aims to maximize profits through high volume sales of low priced goods, means that without any structural changes or incentives, voluntary behaviour change of the price-driven consumer is difficult. Higher prices on sustainable products due to the extra steps taken in ensuring their sustainability in the supply chain often market them well out of the price-range of the majority of consumers. This leaves consumers with lower incomes and short-term household budgets 'locked in' to unsustainable consumption patterns (SCR, 2006a; NCC, 2005). Even if consumers do possess the necessary capital, their willingness to pay for more sustainable products is usually limited to a price differential of 5% to 10% (OECD, 2008).

By providing a large range of choices, retailers do not necessarily make it easy for consumers to act green. It is difficult to change highly routinized behaviour such as food shopping; the majority of consumers are bound by convenience (Clarke et al, 2004). It is estimated that the time we spend making individual purchase decisions in a supermarket is only three seconds (Cabinet Office, 2008). Additionally, research has found that ethical purchase intentions very often do not translate into buying behaviour – in consumer theory this is known as the 'attitude-behaviour' gap (Carrington et al, 2010; Carrigan and Attalla, 2001; Morwitz, Steckel & Gupta, 2007). Of the 30% of consumers who state that they will purchase ethically, only 3% actually do so in practice (Futerra, 2005:92). Consumers who are active and engaged in making sustainable consumption choices generally only make up around 5-10% of the population (Tischner et al., 2010: 237).

Schwartz (2003) highlights another problem with this model in that that increasing consumer choice can be a major cause of anxiety and dissatisfaction. Too much choice can leave us paralyzed and unable to make any decision, forcing us to revert to default routines and habits. When overwhelmed by choice, consumers use mental tricks to speed up the decision-making process such as the 'recognition heuristic', meaning that they will buy products simply because they recognize them, regardless of other factors (DEFRA, 2010b). Routine consumption is not usually conscious or optimal

and recognition of this is important when we consider sustainable consumption policy from the perspective of the choice provider (Sanne, 2002)

3.3 Nudging – The Retailer as a Choice Architect

In the previous model, demand is a result of rational and autonomous consumer choices. However, the reality of the retailer is a hegemonic focus that aims to limit sovereignty in order to induce consumers to act in very particular ways (Esbjerg and Bech-Larsen, 2009). Retailers are not, therefore, simply passive distributors of goods, but are what Thaler and Sunstein (2008) call ‘choice architects’. Due to their immense market power and sophisticated knowledge on consumer behaviour, retailers are experts in structuring, shaping, processing and filtering signals in their stores in ways that promote certain products over others. Retailers spend big money on ‘Retailer Store Atmospherics’ - creating store environments that ‘nudge’ consumer choice down paths that maximize consumption through environmental factors, ambiance, design, positioning of goods and store layout (e.g. see: Baker & Levy, 1992; Sands et al, 2009; Grewal & Baker, 1994).

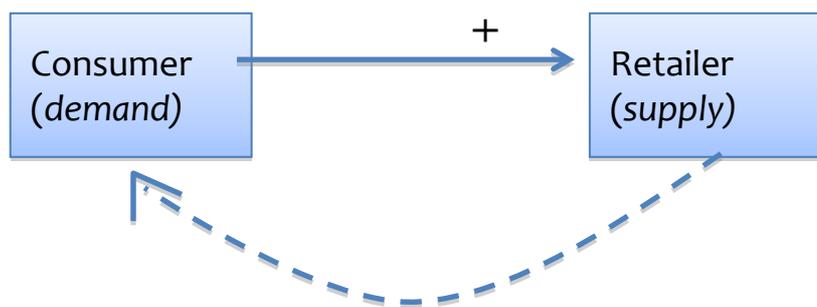


Figure 5: The Choice Architect Model. Retailers ‘nudge’ consumers towards sustainable products, creating demand in the market.

This also means that the retailer can use its guise as a ‘benevolent guardian’ to effectively persuade consumers to purchase sustainable options (Figure 5). The tools used to promote green products by the choice architect are twofold. First are environmental labelling schemes, which provide information to consumers and are intended to engage, educate and empower consumers to make their choices ‘informed’ choices (DEFRA, 2010b). Second is social marketing, the use of marketing communications and awareness raising campaigns to enable and encourage consumers to choose sustainable products⁷ (WBCSD, 2008, Peattie and Peattie, 2009). It is a favoured approach because information provision in itself does not in any way infringe on the sovereign right of consumer choice and has marginal costs compared to other options (DEFRA, 2010a). Choice architecture is thus seen as a kind of ‘libertarian paternalism’ (Thaler and Sunstein, 2008).

⁷ Factors that influence the success of awareness raising campaigns and persuasion tactics include the emotional appeal of the message; the directness of the message – its immediacy and relevance; use of commitment – such as loyalty schemes; retrieval cues – enabling people to easily recall the message; and reinforcing factors – such as low price offers (NCC, 2005).

However, there is scant evidence that increasing information provision actually encourages any changes in consumer behaviour (Defra, 2010a). Labelling schemes have driven change in some areas, but only when they are designed for a small number of key issues closely associated with that product – for example the Forest Stewardship Council (FSC) standard for wood (ACCPE, 2005) in SCR, 2006a). Labelling schemes do not work in the complex and myriad world of sustainability, as packs are simply not big enough to include the factors that are needed on the label, encouraging significant simplification or providing confusing and conflicting information (Lang, 2010; DEFRA, 2010a). Currently there is no standard methodology for labelling schemes that allows consumers to make comparisons between products and the current levels of environmental awareness in society means that labels are only considered by a minority of consumers (DEFRA, 2010a).

Furthermore, if the task of the architect is to construct meaningful places, the task of the ‘choice architect’ is to construct meaningful choices (Esbjerg and Bech-Larsen, 2009: 415). For the profit-seeking retailer, meaningful choices mean choices that are instrumentally rational: those with the highest returns. This essentially means that retailers use the rhetoric of sustainable consumption when communicating with customers but the main aim of retailer marketing is designed to encourage high consumption of mass-produced items (Jones et al, 2009). Choice architecture also has the potential to incentivise the phenomena known as the ‘Jevons paradox’ or ‘rebound effect’ - when retailers promote sustainable products, consumers often buy more in absolute amounts, thus cancelling out the environmental benefits and resource efficiency from their purchase (NCC, 2005).

3.4 Disruptive Innovation: The Retailer as a Choice Editor

Sustainability is usually low on the checklist of consumer ‘needs’ when they enter a supermarket full of choices. The good intentions of a handful ‘green consumers’ has not been – and will not be - enough to drive the major shifts in food production and consumption systems that we need to see to transition to more sustainable consumption patterns (SCR, 2006a). Thus SCP policy should focus on mainstream consumers rather than ‘*expecting a heroic minority to shop their way out of unsustainability*’ (SDC, 2006a:3). In some cases, the ‘shove’ of voluntary bans and government regulation to remove unsustainable products can be more effective than ‘nudging’ or use of behaviour change strategies to promote sustainable ones (Involve, 2010).

While the previous two models have promoted sustainable consumption through changes in consumer behaviour, the last model focuses on changing retailer behaviour. Intervening in supply chains upstream is more reliable than downstream action in creating substantial and direct improvements in product-based environmental and social impact (DEFRA, 2010b). Retailers are continually innovating within supply chains and changing their product assortment on a short-term cycle, therefore there is no (technical) reason why they cannot accommodate sustainability as a factor when updating their range of products.

In the choice-editing model, retailers actively shape consumer choices not by encouraging consumer demand for niche products but by limiting the choice

for consumers to purchase unsustainable items (Figure 6). The benefit of choice editing from a sustainability perspective is that active behaviour change on the part of the consumer is not required. Even when consumers use routinized decision-making, the outcome is always the most sustainable option available. Every consumer is a green consumer because sustainable products are the norm, mainstream option. The idea is not necessarily to provide *more* sustainable products, as was the case in the choice-provider model; but to make *existing* – conventional - products sustainable.

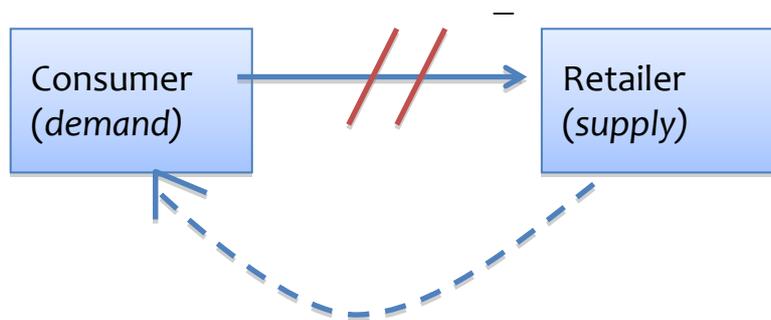


Figure 6: The Choice Editing model. Retailers ban and remove unsustainable items.

As consumers often feel ‘locked-in’ to supermarkets, there is a tendency for them to actively look to retailers to change their practices⁸ (SCR, 2006d). A recent study found that 60% of consumers want retailers to help them make sustainable choices by introducing minimum standards in some product areas (IPSOS, 2007). The choice editing model ‘makes sense’ in the context of low consumer action and means that consumers do not bear the weight of responsibility to deal with complex tradeoffs with regards to environmental stewardship themselves. Relieving the burden on the consumer also has benefits from a socio-cultural and symbolic perspective: limitations and restrictions on consumer choice – in certain contexts – can have the potential to be liberating (Salecl, 2010; Schwartz, 2003).

Choice editing by manufacturers, retailers and regulators has already a good track record in getting high-impact items off the shelves and low impact products onto them. Common products that have been choice-edited by retailers include: FSC certified wood, VOCs in paint, Lead-free petrol, Recycled content in product packaging, A-rated and energy efficient washing machines, fridges, freezers and washing machines and incandescent lightbulbs (SCR, 2006b). Choice editing in the food sector has so far been unsystematic, on an ad-hoc basis. As we have a strong emotional connection to the food we consume, health concerns and animal welfare issues have been the main drivers in both ‘ethical’ behaviour to purchasing sustainable food, and retailers’ choice editing practices (SCR, 2006b). Table 1 contains some of the items that have been removed through choice editing in supermarkets as documented in the literature.

⁸ This reflects the findings of a recent study, which found that approximately 75% of consumers believe that the responsibility for addressing environmental and social concerns should be taken on by the retailers themselves (EAC, 2009).

Item	Example of Retailer implementing	Reason	Drivers and enabling factors
Dolphin-Friendly Tuna	Dansk Supermarked (DK), Asda (UK)	Animal welfare issues	NGOs and campaigners raising awareness, emotive connection
Bluefin tuna	Carrefour (FR), Kesko (FI)	Biodiversity Conservation	NGOs and campaigns, emotive connection
Free Range eggs	Coop (SE), The Co-op (UK)	Animal welfare issues	Perceived benefits of freshness and taste, campaigns by NGOs and media, emotive connection, forthcoming EU ban
Plastic bags	ICA (SE)	Environmental - Waste	High awareness product, emotive connection (marine wildlife), economic benefit for retailers
Fair trade coffee	The Co-op (UK)	Social sustainability, human rights and equity issues	Price differentials within the expected range, wide choice of goods, good recognition of fairtrade label
Fair trade chocolate	The Co-op (UK)	As above	As above
Fair trade Bananas	Suomen lähikauppa (FI)	As above	Small-scale outlet retailer, good supply, price in expected range
GMO foods	Marks and Spencer (UK), Morrisons (UK), Carrefour (FR)	Health issues	Ban on GMO cultivation in the EU, good consensus on unknown impacts of GMO foods
PVC Packaging	Mercadona (SP)	Waste and health issues	Media attention on negative impacts of PVC – health benefit to consumer, possible economic benefits to retailer (dematerialisation)
Artificial Colours and Salts	Marks and Spencer (UK)	Health issues	Clear health benefit for the consumer, control over supply chains

Table 1. Examples Of Choice Editing In Supermarkets

Derived from: SDC (2006b), Bio Intelligence Service (2009), Forum for the Future (2009), Barrientos and Dolan (2003), ETC/SCP (2010), UNEP (2005), Personal communication (2011).

To investigate why retailers are increasingly limiting consumer choices in this seemingly unconventional manner, the drivers, barriers and enabling factors to choice editing are briefly outlined in the following sections⁹.

3.4.1 Drivers

Governments ultimately have the most power to **ban** highly unsustainable or damaging products from the market: provided this is done in a way that fits the investment cycle and follows a period of voluntary agreements or incentives so that businesses have time to adjust (SCR, 2006c). Governments also have the ability to make certain products or ingredients unattractive using **fiscal** policies such as taxation, and other 'sustainable' products attractive using incentives such as reward schemes and tax breaks. The setting of **progressive targets** and **minimum standards** through product road-mapping and the provision of a long term framework within which companies can innovate is a key task for governments and regulatory bodies to drive choice editing forward (DEFRA, 2008). Product-based EU legislation is particularly important due to the single European market and the freedom of movement of products across EU borders¹⁰. Regulatory standards protect retailers from making a loss from banning products and transforming supply chains because there is certainty that their competitors will also have to make the same changes in the future (SCR, 2006c). At the same time, businesses may gain **first mover advantage** by anticipating forthcoming regulation whilst remaining secure in the knowledge that a 'rising tide raises all boats' and other companies will have to follow. Early announcement of legislation to set minimum standards may drive a virtuous cycle of rapid innovation and further choice editing (SCR, 2006a). Minimum standards can also be voluntary initiatives promoted by companies, trade associations or networks¹¹.

In the absence of regulation, retailers are able to market sustainable goods and services only if there is a good business case. The risk/opportunity balance of the sustainable option in the choice editing model must be somehow more favourable than the unsustainable option. Therefore, removing an unsustainable product from the shelves must create some **competitive advantage** or added value for the retailer in question. Any case for choice editing must be meaningful in conventional business terms where the cost of doing nothing (business as usual) will be higher than choice editing (SCR, 2006c).

Business **reputation** is an important driver for choice editing. (Tuncer, 2009). If a retailer stocks only sustainable products, it creates a strong message about their company values and forms part of a broader **brand image** connected to the idea of responsibility (SCR, 2006c). Choice editing

⁹ It is important to mention that as choice editing is a new concept, there is scant empirical literature available explicitly on the topic. The only 'in-depth' study on choice editing so far is the Sustainable Consumption Roundtable's 2006 report 'Looking back, looking forward: Lessons in Choice Editing for Sustainability'. Much of the following framework is based on the findings from this report.

¹⁰ For example, this has been the case for prohibition of toxic chemicals under the *Restriction of Hazardous Substances Directive* (DEFRA, 2008).

¹¹ The European industry commitment to only produce white goods above a specific energy rating by a particular deadline is a good example of voluntary industrial standard setting.

also may be **internally driven** if sustainability issues are built into the corporate values and strategy of a company. Taking active responsibility by choice editing can have the benefit of creating morale within the company itself (SCR, 2006a). Driving choice editing from a business perspective is very much based on strong **leadership** from company boards and directors, supplemented by employee pressures.

If an issue has emotional resonance, consumers can lead market transformation driven by **social pressure** and unacceptability. Only consumers can turn a 'can have' product into a 'must have', so it follows that they can also turn a 'can't have' into a 'won't have'. This has been the case in the past with **public awareness campaigns** by NGOs, media and government driving the social unacceptability of drink driving and smoking (SCR, 2006c). Consumer groups and watchdogs can drive choice editing by **lobbying** retailers to remove certain products but are also well-placed to raise public awareness of sustainability issues. Awareness can also come from external events such as health scares (e.g. the BSE crisis) or climate related events (ibid). A steady fall in consumer demand provides a legitimate business case to remove a product from sale, and businesses that move in anticipation of these influences have the potential to become market leaders (SDC, 2006a).

3.4.2 Enabling Factors

The key enabling factor for choice editing is ensuring that sustainable products perform to the expectation of the relevant market and within an accepted price differential (SDC, 2006b). Unless consumer choice is driven by a strongly emotional basis, products are largely not sold on a green or ethical platform. People do not eat sustainability or drive it – they eat food and drive cars so **performance** needs to be the key focus if choice editing is to be successful (SCR, 2006a). Products should be a close equivalent to the norm in terms of price, quality and availability.

The choice editor must not simply chop away products but should provide a range of sustainable alternatives if possible to continue to provide a sufficiently compelling **illusion of choice** and sovereignty (Maniates, 2010). This ensures consumers stay happy and creates **consumer trust**: without it retailers are not able to generate the needed creditability to remove products. There is an uneasy tension here: who decides what is or isn't sustainable? Choices to edit products are often in conflict with other goals and agendas of a company and rely on transparency between business, government and consumers (WBCSD, 2008). Transparency and trust are improved by the engagement of retailers with **NGOs** and other **stakeholders**, as consumers are often more willing to trust well-known brands or NGO backed labels than government schemes (SCR, 2006c; Kong et al, 2002). Consumer trust is predicated by public acceptance and consumer awareness of the issue at stake, and generally requires adequate knowledge in society of environmental issues and to some extent a consensus on accepting reduced sovereignty for the purposes of a 'greater good' (Michaelis, 2002).

As transparency is essential in order to win consumer trust, business needs to develop a robust set of **indicators** and a clear message about the benefits of their actions to consumers. This rests on well-defined information about why

products are to be removed from the market. This information may be derived from recognized **labeling** schemes, a key enabling factor for choice editing but insignificant in itself to drive market change (SDC, 2006a).

3.4.3 Limitations

The economic system rewards businesses that can create and sustain high consumption rates for their products. On the surface, removing products from sale appears to be going against the grain of conventional business wisdom. Choice editing could entail a large **competitive loss** if other companies in the sector continue to sell conventional products at lower prices, and there is no reason for retailers to be willing to remove profit-creating products from their shelves unless there is a larger benefit to do so. A lack of progressive, product-related **regulation** and minimum standards may mean that the case for voluntary choice editing is difficult to find.

Mainstreaming sustainable ‘alternatives’ to removed (*delisted*) items is not possible if prices are higher than the conventional range as consumers are generally not willing to pay more for sustainable products. This is a significant barrier as the likelihood of sustainable options being cheaper than the conventional is very low – for example, significant price differences have prevented mainstreaming of organics (SCR, 2006b). Lang et al (2009) concede that within the ‘choice spectrum’, consumers are ultimately bound by their socio-economic status. Figure 7 shows that poor consumers are more reliant on retailers to choice edit for the greater good than rich consumers, who have the luxury of choice. However, a paradox emerges as it also follows that retailers too are limited in the extent to which they can practice choice editing if they are competing on low prices, catering for lower economic market segments. These retailers will only be able to mainstream sustainable products if they are cheaper than the items they already sell; otherwise they will lose their share of the market.

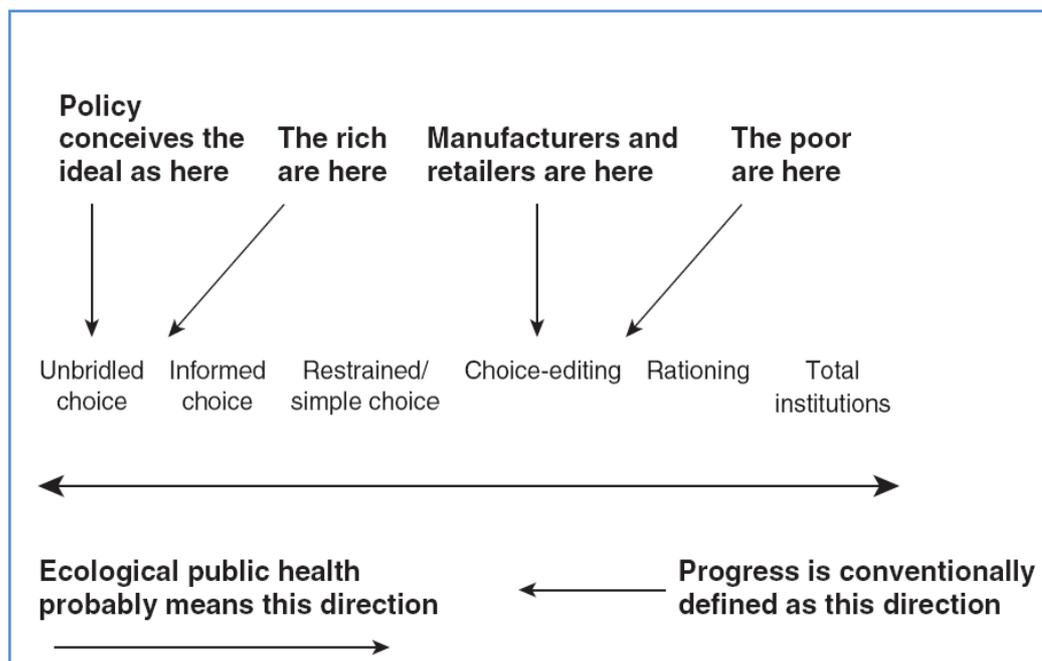


Figure 7: The Choice Spectrum. Source: Lang, Barling & Caraher (2009)

Another limitation is the **availability** of sustainable products at the scale needed for their mainstreaming. Research has shown that for niche products such as fair trade coffee, increasing success and demand for the product has caused problems with scaling up the supply chain; and attempts to do so have drawn criticism that the benefits of the fair-trade label for small scale farmers have now been outweighed by the inclusion of 'middle-men' that inevitably comes through producing a product for commercial purposes (SDC, 2006b; Barrientos and Dolan, 2006).

The absence of a common framework for choice editing can lead to confusing or contradicting messages about sustainability issues with regards to different products from different retailers, and may lead to the consumer perception that goods are inferior in quality or more expensive with no clear reason as to why (SDC, 2006,b).

There is also an element of **ideological** risk implicit in choice editing as it implies the idea of nanny corporations and omniscience (Lang, 2010). The 'disabling myth of consumer sovereignty' undermines the rationale for choice editing by disseminating the proposition that what retailers sell is driven solely by autonomous consumer choices (the 'choice-provider model') (Princen, 2010). Therefore the prevailing doctrine in consumer culture of choice availability and the persistent belief that product labeling along will lead to necessary consumption changes based on 'informed choice' are significant barriers to this model (Mainates, 2010).

A summary of the drivers, barriers and enabling factors for choice editing can be seen in Table 2.

DRIVERS	ENABLING FACTORS	BARRIERS
Minimum Product Standards	Price within expected range	Consumer Demand
Industry wide agreements	Future market certainty	Business 'lock-in' to profit-oriented consumption patterns
Consumer / NGO Watchdogs	High quality alternatives	Availability of sustainable options at scale
Consumer Demand	Transparency and consumer trust	Perception of alternatives – low quality and expensive
Animal welfare concerns	NGO partnerships	Scientific information lacking or difficult to translate to consumers
Health concerns	Influence in supply chain	Confusing messages
Company values	Clear indicators	Competitive loss
Awareness Campaigns	Labelling Schemes	Ideological risk of interfering with consumer autonomy
Fiscal Incentives		
Brand image		
Social pressure		
First mover advantage		
Long term profitability		
Competitive advantage		
Strong corporate leadership		

Table 2: The Case For Sustainable Consumption Through Choice Editing.

3.5 Literature Summary

Retailers make choices for consumers all the time by choosing to offer and promote certain products and not others, thus in reality, the three models of choice provision are not mutually exclusive but co-exist. For example, choice editing relies on not only a conscious 'editing' of the product assortment but also by an active dis-encouragement to purchase unsustainable items using the same information channels as the choice-architect. Table 3 summarizes the three models of choice discussed.

Choice Model	Retailers Role	Characteristics	Mechanism For Sustainable Consumption	Limitations
Choice provider	Increase consumer choice of all available goods	Sustainable options provided for the green consumer to freely choose; profits made from niche markets. Focus is on selling high volume, cheap products as mainstream	Consumer autonomy and sovereignty, free-choice	Relies on voluntarism, consumer 'lock-in' to consumption habits
Choice architect	'Nudge' consumers towards sustainable options	Use of Store Atmospherics and information provision (social marketing and product labeling) actively promotes sustainable options alongside regular goods.	Behaviour change initiatives, 'informed-choice'	Information provision not necessarily effective for behaviour change, Jevons' paradox, risks that retailers make no real commitment to sustainable consumption
Choice editor	Limit consumer choice to solely sustainable options	Active intervention by retailer means sustainable options are 'mainstreamed' by removing unsustainable products from the shelves	Retailer intervention into product assortment provides structure for sustainable consumption with no active need for consumers to choose it.	Business case can be hard to find, thus could rely on government intervention. Requires high levels of consumer trust due to ideological limitations.

Table 3: Summary of Choice Models

4 The Empirical Study

In order to understand how choice editing can be used as a tool to mainstream sustainable food products in the retail sector, an investigation of current practices in European supermarkets was conducted using fish as a product that has seen a recent trend in increasing levels of choice editing (Greenpeace, 2008). The goal of this study was to investigate why and how retailers are working with choice editing to encourage and enable the purchase of sustainable products by a wider range of customers, and to investigate how retailers manage the contradiction of simultaneously choice editing and promoting freedom of choice. The retailers involved in the study are outlined in Appendix 2 and are summarised in Table 4. This chapter will introduce the sustainability issues connected to the case of fish before the findings are discussed using the framework developed from the literature analysis: drivers, barriers and enabling factors.

Name	Market Share	Market Segmentation
Retailer A	~15%	Lower-Middle
Coop	21.4% ¹²	Middle
ICA	~45% ¹³	Middle
Retailer B	21.5% ¹⁴	Lower – Middle
The Co-operative	~6% ¹⁵	Middle
Willys	~10% ¹⁶	Lower
Waitrose	~4% ¹⁷	Upper

Table 4: Overview of Retailers' Market Share and Segmentation

4.1 The Case of Sustainable Fish

Many commonly sold fish species, for example cod, have become endangered due to industrial scale overfishing and fish stocks in many parts of the world are on the verge of collapse. Globally, about 75% of major fisheries are fully exploited, over exploited or depleted (FAO, 2004). In Europe, a history of intensive fishing activity has resulted in the chronic depletion of many fish stocks and extensive marine ecosystem damage (MCS, 2007). The European Commission cites that 88% of stocks in EU¹⁸ waters are overfished and in 19% of these stocks, scientists advice that there should be no fishing at all (European Commission, 2008: 4). At the same time, an average EU15 citizen

¹² KF Annual Report, 2009

¹³ ICA Annual Report, 2009

¹⁴ BBC 10 O'Clock News, 19/04/2011

¹⁵ The Co-op Annual Report, 2010

¹⁶ Axfood Annual Report, 2009

¹⁷ <http://www.guardian.co.uk/business/2010/may/25/asda-tesco-supermarkets-sales>

¹⁸ Fisheries management is currently regulated at the EU level by the Common Fisheries Policy (CFP), which focuses on individual commercial species and catchment quotas instead of a more integrated, mixed-species policy. The CFP has been criticized for being unsustainable and wasteful due to regulations around the issue of by-catch and changes to how fisheries are managed and harvested are now urgently required to restore marine fish stocks, ecosystems and the industries that rely on them (MCS, 2007; European Commission, 2009).

consumes 25.6kg of fish products per year, 63% higher than the global average of 16.3kg per capita (Laurenti, 2009). The retail sector has a major part to play in promoting and supporting consumer demand for better-sourced seafood - 85 % of chilled and frozen fish is sold through supermarkets in the UK (MCS, 2007). A MORI report in 2005 found that 74% of consumers agree that if fish like cod is endangered, it should not be available to buy in supermarkets (NCC, 2005).

The matter of sourcing sustainable seafood for retailers is complex and demands transparency in the supply chain. Defining what is and isn't sustainable can be extremely difficult both temporally and spatially; the most common criteria used to assess fish sold by retailers are presented in Box 1. A definition of sustainable seafood by Greenpeace is seafood that *'comes from a fishery whose practices can be maintained indefinitely without reducing the target species' ability to maintain its population or adversely impacting any other species within the marine ecosystem by removing their food sources, accidentally killing them, or damaging their environment'* (Greenpeace, 2011).

- **Species of fish** – including both species that are endangered from overfished and depleted stocks, and species that are in a critical state and vulnerable to fishing pressure or are being fished at a high rate.
- **Catch area** – Some fisheries are already overfished; others are badly managed and contain rapidly declining stocks. In some areas, pirate fishing – Illegal, Unregulated and Unreported (IUU) – is also a major problem.
- **Catch method** – methods that damage the seabed or impact sensitive marine habitats, such as bottom-trawling; as well as methods that capture high amounts of fish that cannot be sold but are thrown back dead (by-catch), methods that catch high amounts of immature fish; and methods that accidentally capture and kill endangered marine species such as turtles, sharks and dolphins
- Additional sustainability criteria apply for farmed fish based on their feed and technique of rearing: sustainable aquaculture should minimise the use of antibiotics, treat wastewater, raise stock on organic fishmeal and ensure measures are taken so that farmed species do not escape into the wild and threaten indigenous fish breeds (MCS, 2007).

Box 1: Criteria to assess the sustainability of fish used by Retailers

Many retailers have developed specific policies with regards to the seafood that they sell to ensure that they source from well-managed fisheries and are thus not involved in the overdepletion of fish stocks (Goad, 2010). Some of the policy interventions that retailers can use to source and promote sustainable fish are shown in Figure 8; generally they are used simultaneously.

Upstream	Instore / Downstream
<ul style="list-style-type: none"> • Engaging suppliers and helping them to transform to more sustainable practices, e.g. fishing methods • Creating and implementing codes of conduct and policy with regards to fish. • Monitoring suppliers • Monitoring fish stocks • Sourcing locally if possible • Choice-editing the most vulnerable species 	<ul style="list-style-type: none"> • Labelling fish ('colour-coded' schemes or responsible sourcing schemes, e.g. MSC labelled) • Providing alternatives to the most popular or endangered choices • Staff training • Consumer education campaigns • Promotion of sustainable fish species

Figure 8: Retailer measures for sustainable seafood.

Cooperation between NGOs and corporations working within the fishing industry is important for sharing knowledge and best practice in this complex field. The Marine Stewardship Council (MSC), for example, has developed a successful labelling scheme for sustainable fish that is used throughout Europe. Several NGOs and intergovernmental bodies have developed lists of endangered fish that they recommend retailers should avoid sourcing based on catchment method, species and area of catch. For example, Greenpeace has created an 'international red list' that highlights key species companies should remove as a first step in moving towards sustainable seafood, advocating that retailers '*Remove the Worst, Support the Best and Improve the Rest*' as best practice for retailer policy (Greenpeace, 2011). Similarly, the WWF works with the Marine Conservation Society (MCS) to provide a list of 'fish to eat' and 'fish to avoid' (available in Appendix 4). Delisting the most threatened fish species by choice-editing is perhaps the most powerful tool retailers have to ensure that fish stocks are not overfished and have a chance to recover in the future.¹⁹

4.2 Overview of Choice Editing Practices

A detailed review of the choice editing activities of the retailers interviewed is outlined in Appendix 5. All retailers' choice edit their fish selection to varying extents, and the criteria and indicators used to delist fish products differs a fair amount. In general, fish is edited on the basis of species and catch method to a greater extent than on the basis of catch area. The general criteria used to edit fish products are summarized in Table 5.

¹⁹ As a consumer participant in a sustainable consumption for retail workshop remarked: '*If you go to a fish shop, there's a whole range of fish and if there's no cod, you can't buy cod. End of story really.*' Consumer Forum participant (SCR, 2006).

Retailer	Fish Species	Catch Area	Catch Method	Organic (farmed)
Retailer A	✓	✓	✓	✓
Retailer B	✗	✗	✓	✗
Coop	✓	✓	✓	✓
The Co-op	✓	✓	✓	✓
ICA	✓	-	✓	✓
Waitrose	✓	✓	✓	✓
Willys	✓	✗	✗	✗

Table 5: Sustainability Criteria Used To Remove Fish Products From Sale

The most commonly removed product is Tuna that has not been caught by dolphin – friendly catch methods. A range of other fish that are not sold or have actively been delisted were mentioned; some of the most common were Eel, Dogfish, and Cod and Haddock from North Sea fisheries. There is general consensus that fish sourced from Marine Stewardship Council certified fisheries are sustainable, as is tuna that has been certified by the Earth Island Institute as caught ‘dolphin friendly’. Other examples of criteria to choose edit sustainable fish are fish on the ‘threatened list’ of the Marine Conservation Society, fish on the ‘avoid’ list of the WWF, fish certified by the Sustainable Fisheries Partnership, GlobalGAP certified aquaculture, Krav (organic) farmed fish, and fish adhering to Naturskyddsforeningen’s standards on responsible retail. Internal product-based criteria are also used.

None of the retailers had mainstreamed the sustainable option for all of the fish products sold in-store (i.e. removed *all* unsustainable fish from their assortment), but they all mentioned that choice editing fish is an ongoing process of transformation. Many retailers have adopted target dates for key choice editing goals, for example:

- Retailer A is aiming to sell 100% sustainable fish by the end of 2011 (as recognized by the Sustainable Fisheries Partnership)
- Retailer B will sell only pole and line caught own brand tinned tuna by 2010.

A summary of the main drivers, barriers and enabling factors cited by retailers in interviews for the choice editing of fish are summarized by Table 6, below.

	DRIVERS	ENABLING FACTORS	BARRIERS
Common Findings from case and literature	<p>NGO Pressure</p> <p>Consumer Demand (sustainable fish)</p> <p>Internal - company values</p> <p>Awareness Campaigns (NGO and Media)</p> <p>Positive Brand image</p> <p>Social pressure</p> <p>First mover advantage</p> <p>Long term Profitability</p> <p>Competitive Advantage</p> <p>Strong Leadership</p> <p><i>Animal welfare concerns (implicit)</i></p>	<p>Price within expected range</p> <p>High quality alternatives to items removed</p> <p>Transparency and consumer trust</p> <p>NGO Partnerships</p> <p>Clear indicators</p> <p>Labeling Schemes</p> <p>Maintaining an illusion of choice</p>	<p>Consumer demand (unsustainable fish)</p> <p>Business 'lock-in' to profit oriented consumption</p> <p>Availability of sustainable options at scale</p> <p>Scientific information lacking or difficult to translate to consumers</p> <p>Confusing messages</p> <p>Competitive Loss</p> <p>Ideological risk of interfering with consumer autonomy</p>
Findings in literature only	<p>Minimum product standards</p> <p>Industry-wide agreements</p> <p>Consumer watchdog pressure</p> <p>Health concerns</p> <p>Fiscal incentives</p>	<p>Future market certainty</p> <p>Influence in supply chain</p>	N/A
Findings in case only	<p>Risk management</p> <p>Eco-efficiency</p>	<p>Regularly updated scientific information</p> <p>Good awareness of sustainability issues in society</p>	<p>Lack of consumer awareness on the issues</p> <p>Potential for negative publicity</p> <p>Absence of help from governmental institutions</p> <p>Lack of minimum product standards and consensus on meaning of 'sustainable' sourcing</p>

Table 6: Drivers, Enabling Factors and Barriers for Choice Editing of Fish by European Retailers

5 Analysis

In this chapter, the drivers, enabling factors and barriers for choice editing in the case of fish are discussed in comparison to the findings from the literature. The business case for choice editing is developed and limitations to the practice are explored with reference to the framework of the key actors involved with governing SCP systems (consumers, government and business, as represented by the ‘Triangle of Change for SCP’ in Figure 1).

5.1 Drivers: Building the Business Case for Choice Editing

There are two major drivers for choice editing discussed: governmental intervention in the market, or voluntary action by industry. The first rests on regulation on poorly performing products to drive their removal, or fiscal incentives to promote sustainable products. The second driver is the business case for companies to choice edit which means that they benefit from some added value by doing so – either in real (economic) terms or in perceived (reputational) value (WBCSD, 2008).

5.1.1 Regulation

Food retailers are bound by market dynamics just as any other business; they exist to make profit, fight for their share of the market and beat their competitors. They are controlled primarily by market forces, and governments have traditionally held back from interfering in the marketplace of this sector to the extent that some believe that the private corporate governance of supermarkets is now stronger than the role of the traditional state (McMichael and Friedmann, 2007). This means there is little strict product-based regulation to which food retailers must adhere their assortment (Blythman, 2005). Regulation was mentioned as a strong driver in the literature with regards to other product categories (SCR 2006b) but has not driven the choice editing of fish, partly because EU regulation on fisheries is currently under debate and in reform. This essentially means that *all* choice editing of fish is done by retailers on a voluntary basis.

The need for clearer signals from authorities with regards to selling sustainable fish was widespread. Retailer A cited regulatory failure as the reason that retailers had to practice voluntary choice editing to ‘*sort out the state of the fisheries*’. Banning fish products on environmental criteria was broadly seen as the role of the government, not the retailer. There was agreement that progressive regulation on fish standards would be the quickest and most effective mechanism to create widespread changes in the sector, by allowing retailers to meet their competitors on a level playing field. However, the Co-op – a ‘forerunner’ in choice editing fish - voiced concerns that future product-based regulation could block progressive supply-chain innovation by catering to the ‘lowest common denominator’ between businesses. Regulation could thus counteract the first mover advantages that arise with voluntary sustainability measures taken by pro-active companies (Porter and van der Linde, 1995). Waitrose outlined that the best case to drive choice editing would be:

“To set policy that will encourage transition to the more sustainable option over a suitable timescale ending with increasing disincentives (probably financial) for products not meeting the required standard, and incentives linked to quality, as that is what consumers primarily want”.

5.1.2 Brand Image

Retailers are generally very uneasy to be seen to be reacting to regulation as their ‘green and responsible image’ suddenly disappears if consumers realize that so-called voluntary actions are not due to ‘*wanting*’ to deal with these issues’ but instead because of ‘*having*’ to deal with these issues’. The absence of regulation has in part enabled the business case for voluntary choice editing of fish to develop by creating a **responsible brand image** as a result of voluntary action (Broomhill, 2007).

Generating a positive, responsible and sustainable brand image was therefore found to be the key driving force for retailers in their efforts to choice edit fish. Enhancing retailer reputation by promoting an image of ‘doing the right thing’ creates ‘added-value’ in a company through expressing responsible brand values and thus also generates consumer trust, making it more likely that consumers will shop and stay loyal to a particular retailer²⁰ (UNEP, 2005). Waitrose mentioned that the socio-psychological loss of breaking brand values by selling endangered fish species would by far outweigh any economic loss that might be associated with delisting them. A brand image linked to strong corporate ethics and responsibility has been a successful business strategy for companies such as the Body Shop or Ben & Jerrys (Michaelis, 2003).

Connected to this, part of the business case for choice editing lies in **risk management**. Corporate level branding involves consumers buying into a set of values associated with a store and consumers inherently trust that every item in that shop is sourced and produced in-line with those values. Ensuring that fish do not come from depleted stocks reduces the risk that this kind of consumer trust can be undermined. Paying attention to consumer concerns reduces retailers’ vulnerability to brand based attacks and allows retailers to stay ahead of the market (Shove, 2004; SCR, 2006a).

5.1.3 Eco-Efficiency and Long-Termism

A healthy marine ecosystem is a source of critical natural capital from which retailers make their profits in the form of fish. Ensuring that this ecosystem is not degraded increases the opportunity for retail businesses to remain a long-term going-concern. Retailers are increasingly aware of the importance of maintaining their stocks of natural capital, and the case of fish is a good example of retailers’ investments into eco-efficiency: ensuring that they are ecologically sustainable (using natural resources at a rate below their reproduction rate that does not degrade ecosystem services) in order to remain economically sustainable (able to safeguard liquidity while producing above average returns to shareholders) (Dyllicks and Hockerts, 2002). Eco-

²⁰ Appealing to consumers is key business for supermarkets, as 85% of consumers tend to be ‘locked in’ to a particular store (Harvey, 2007).

efficiency is often cited as the business link to sustainable development that allows firms to integrate environmental concerns into conventional business models (ibid.; Michaelis, 2003).

The Co-op view long-term profitability as the fundamental reason as to why they do not sell endangered species: overfishing puts their future profits in jeopardy; thus choice editing is the key to taking a longer term view to be both economically and environmentally sustainable. ICA also mentioned that protecting fish stocks is a classic 'win-win' situation for both environment and business. Tukker et al (2006) characterize this environmental stewardship strategy to maintain long-term profitability as a form of 'enlightened self-interest'. **Environmental stewardship** and **eco-efficiency** are therefore also linked to the creation of (long-term) economic profits in developing the business case for choice editing.

5.1.4 Internal Drivers

In some cases, retailers mentioned choice editing their fish assortment was due to **internal values** – the incorporation of ethical concerns into the business model and the belief that environmental protection is inherently the right thing to do. Waitrose, for example, acknowledged the confines of an individualistic consumer-based policy and the difficulty of changing consumer behaviour, which has driven them to limit consumer choice to sustainable products wherever possible:

“We take the view that we know more than our customers and that we therefore have a responsibility to do this on their behalf in the interests of the bigger picture [...] customer education policies are often quoted as things we should do but they will not deliver the required step change on a sufficiently short timescale”.

Choice editing can create **first-mover advantage** for the more value-driven companies who target 'ethical consumers', the market segment most likely to realise environmental and social concerns about fish first. Examples are Coop²¹, Waitrose and The Co-op, who mentioned that pre-empting consumer demands for sustainable fish – '*continually looking at the horizon and wondering what will come over it*' - allows them to act pro-actively, protecting their strong brand values from criticism and thus also maintaining their reputation as forerunners in ethical retailing (Barrientos and Dolan, 2003).

In these cases, a well-defined green image, transparency and ethical brand values have enabled retailers to intervene in their supply chains. The retailers who practice choice editing due to internal drivers may be examples of what Benn and Dunphy (2005) call 'ecocentric' organisations: companies that incorporate values of 'stewardship, equity, humility, permanence, precaution and sufficiency' into their strategy and decision-making processes, balancing economic self-interest with broader moral values. Firms that incorporate

²¹ Bansal and Kilbourne (2001) mention that retailers that follow a co-operative structure (Coop and the Co-op) are generally more aligned with ecologically sustainable principles due to their responsibilities with regards to their members inherent in their business model.

environmental principles into their decisions as a goal of their corporate identity are inclined to go far beyond compliance measures even if the numerical pay-off cannot be calculate ex-ante (Kagan et al, 2003). It is these progressive and innovative companies in particular who can recognize the benefits of choice editing and thus have the potential to utilize it most efficiently²².

5.1.5 Social Norms

Michaelis (2003) argues that cultural change is ultimately needed to achieve sustainable consumption. For retailers, changes in consumption patterns rest upon shifts in society, norms created around what is and isn't acceptable to buy. For example, government-implemented smoking bans have made it quickly unacceptable to smoke in many countries, a norm that would have been unthinkable only five years ago. In a similar vein, if it becomes normatively unacceptable to sell endangered fish within a certain society then businesses can gain status by actively *not selling* those fish and advertising this fact to their customers. Retailers choice-edit primarily because it is expected of them, they are obliged to do so due to an 'industrial morality' that arises due to value changes in society particularly with regards to emotive products such as fish (Gunningham & Rees, 1997).

Governments can drive these changes in civil society by enabling responsible citizens to make sound consumer choices within a climate of mutual trust and healthy democratic dialogue (Hobson, 2004). However, governments tend to shy away from prescriptive policies and discourses with regards to espousing environmental values, especially with regards to what we 'should and shouldn't eat' (Fuchs and Kalfagianni, 2009). As consumer behaviour continues to be seen as a largely private matter, government interventions are extremely unpopular when they are seen as interfering with the private lives and autonomy of citizens within a so-called 'nanny-state' (Hobson, 2004).

Instead, the role of **civil society institutions** including the media are vital for creating a business case for choice editing by disseminating norms and values in mainstream society about the acceptability of consuming unsustainable products. The **media** in particular has the ability to act as a bridge between corporations and society, and thus can communicate positive retailer actions to the public, as well as scrutinizing negative ones (Broomhill, 2007).

In this case, reacting to social norms around sustainable fish consumption has driven **competitive advantage** among retailers as issues surrounding fish sourcing have had widespread media and NGO attention in recent years and

²² Companies that choice edit due to internal demand may be practicing so-called 'stakeholder capitalism', in line with Dyllick and Hekkerts' (2002) definition of corporate sustainability as meeting the needs of a firms' stakeholders (employees, shareholders, customers etc) without compromising their ability to meet the needs of future stakeholders as well. Doing so requires integrating short-term economic returns with a longer-term preservation of natural, social and economic capital base (ibid.) The arguments surrounding the definition of shareholder and stakeholder business models within the CSR literature are complex and beyond the scope of this thesis, for further reference please see: Gunningham and Rees (1997) or Steurer et al (2005).

issues surrounding sustainable fish have a high recognition factor with the public. An example of this was given by Retailer B who recently ran a promotional campaign on Pouting, a whitefish that has had a lot of attention as a 'sustainable alternative to Cod'²³ - the well-timed campaign had the effect of raising their sales of pouting by 50%. This reinforces the idea that emotional resonance within the public domain makes choice editing easier for retailers to engage with – the issues connected to fish, especially on by-catches and discards are 'extremely emotive' (Agnew et al, 2009).

On the other hand, this means that a market must be headed in a certain direction to be able to remove items, so a barrier to choice editing appears if consumers are not already clued-up on product related issues. Retailer A voiced this by arguing that:

'You can choice edit just in front of where the consumer is already headed, but if the gap between what you've done and their understanding of it is too great, they will take their purchasing elsewhere. I could take cigarettes off the shelves, but people will still smoke cigarettes'

That being said, failure to adapt to shifting values in the public sphere can severely disadvantage a business or whole industry, a classic example being the chemical industry's slow response to the rise of environmentalism (Gunningham and Rees, 1997).

This reflects the findings of Michaelis (2002) who argues that the business case for sustainable consumption ultimately rests on changes in society driven by government campaigns, media and civil society. Business culture – locked in by its fundamental role to create value for its shareholders -is only likely to change as part of a wider shift, demanded and promoted by a change in public values towards a different conception of prosperity and an increased awareness of environmental and social sustainability issues (ibid; Spaargaren, 2003).

5.2 Enabling Factors: What allows the choice editing of fish?

5.2.1 Product Information and Clear Indicators

A sound evidence base appears to be a major success factor for sustainable consumption policies (Scholl et al, 2010:46). For this purpose, well-defined product standards from trusted authorities can provide a baseline upon which to compare criteria from a sustainability perspective, especially important since choice editing raises difficult questions as to what can be removed by consideration of 'the greater good' (Mainates, 2010; Lang, 2010).

The sustainability issues surrounding catchment areas and fish species are not only complex but also changing frequently, often making it hard to distinguish what is and isn't sustainable seafood. Waitrose mentioned there is a critical

²³ 'Hughs Big Fish Fight' – A UK TV series and lobbying campaign involving celebrities that raised awareness on sustainable fish, in particular by lobbying for quota and by-catch reform in the EU CFP and expressing the need for alternative sources of fish to endangered best-selling species. Pouting was championed as a widely available, well-stocked sustainable fish that consumers should eat more of. See: <http://www.fishfight.net/> for more information.

need for a consensus on the meaning of sustainability in order to make it workable in policy and in practice – both with regards to fish, but also in a broader sense. The choice editing of fish would certainly be easier for retailers if there were some EU-wide regulations and product standards relating to the sustainable sourcing of fish – perhaps as part of the CFP.

In the absence of sourcing standards, NGOs have played a critical role in disseminating knowledge with regards to fish. The most widespread choice editing practices were based on ‘fish to avoid lists’ generated internally with advice of external stakeholders or entirely by external stakeholders and adhered to by the retailer. Coop, The Co-op and Waitrose use the advice of internal working groups that involve external stakeholders such as scientists and NGOs to keep up to date on the latest developments in fisheries knowledge and policy, and to ensure that their policies evolve and remain relevant over time. Multi-stakeholder participation not only helps retailers to expand their scientific evidence base and identify the best fish to remove in their assortment, but it also increases the legitimacy for the retailer’s policy actions (Scholl et al, 2010). It reduces scientific complexity and provides clear and concise product information and indicators for retailers to easily evaluate and compare products, and thus to edit their assortment accordingly. It also allows the communication of clear messages about sustainable fish to consumers.

Overall, it may be easier to edit assortments to a certain standard or indicator than it is to remove goods entirely from the shelves due to the ideological barrier of removing consumer choice (Schwartz, 2003). This reiterates the SCR’s findings that **labeling** of performance ratings is a key enabler for choice editing (SCR, 2006b). The MSC label has been particularly successful in enabling retailers to choice edit as it provides baseline standards for EU-wide sustainable fish products, on which fisheries can be easily audited and products compared. The MSC label addresses calls that an inconsistency of existing labelling schemes leads to “*a confusing landscape that does not allow consumers to make informed choices about seafood*” (Guardian, 2011). The enabling role of the MSC label is underpinned by its good recognition rate within the EU.

Reliance on labeling alone as a panacea for consumer behaviour change is inadvisable: consumers remain confused by labeling schemes and often tend to ignore them (WBCSD, 2008; Yates, 2008). The MSC label itself has had criticism – for example, Greenpeace does not currently endorse the scheme because under its rules, fisheries that are still unsustainable (even if they are working to improve) can be awarded the logo (Greenpeace, 2011). In practice however, the MSC label is important when it is used as the first step towards a product range in which all non-labeled products are removed from sale. Labels are useful for choice editing when they help retailers to decide which products to remove and then to communicate this removal in a legitimate way to the customer; rather than as a tool to promote behaviour change predicated on ‘informed choice’.

5.2.2 Legitimacy and Trust

Choice editing is the connective tissue between how an industry acts, and what the public considers to be socially acceptable and desirable (Gunningham and Rees, 1997). Achieving transparency in the eyes of the public is crucial for choice editing to be successful. One way that a business can gain legitimacy is through reporting on their sustainability activities (WBCSD, 2008). With regards to fish, the general trend is that the more information on sustainable fish and sourcing policy a retailer provides through downstream measures (such as information on their website), the more likely they are to remove items from their fish assortment due to sustainability reasons.

NGOs working with issues of sustainable fish have also been a key source of retailer legitimacy and consumer trust by partnering with retailers on voluntary supply chain initiatives. Kong et al (2002) express the importance of **NGO**-business partnerships for sustainable consumption policy due to their ability to engage with private actors to realize public goals. NGOs engage with businesses through a variety of approaches, including:

- Assessment of environmental impacts of products,
- Greening the supply of products and services (whereby a passive consumer is given a more sustainable product by default),
- Creating green demand and informed choice by labeling and household information schemes
- Networking with different stakeholders around a central issue
- Holding businesses to account for their actions (Elkington, 2007)

In this case, NGOs have created credibility and legitimacy for retailer choice editing by assessing product-based environmental impacts with regards to fish-based criteria, communicating up-to-date scientific information on fisheries to retailers, and creating demand in the public sphere for sustainable fish products and for the removal of endangered species from shops. They have also put pressure directly onto retailers by lobbying them with regards to their sourcing standards: Willys removed tropical shrimp, for example, primarily because it was required to do so within its partnership with Naturskyddsforenigen.

NGOs also have a strategic opportunity to influence norms and values in civil society with regards to sustainability issues with a greater deal of legitimacy than governments or retailers, driving consumer demand for choice editing. They are accredited with creating an environment within which consumers can act as a driver – campaigns run by the WWF, Greenpeace and the Marine Conservation Society all create cases for increased awareness and public acceptability for delisting fish, which in turn creates added value in terms of brand image for retailers. By partnering with NGOs, retailers have an opportunity to gain legitimacy for actions that may otherwise be seen as a reputational risk (deMan and Burns, 2006).

5.2.3 Price

Price is generally considered a major limitation to the practice of choice editing (SCR, 2006a). Retailers were very clear to echo the WBCSD (2008) in that consumers are unwilling to sacrifice price or performance for sustainability. This was mentioned by Coop, who claimed that most consumers *'don't care about sustainability issues, but they do care about the*

price, thus price is always the driving factor when deciding which products to sell. However, with the case of fish, price has been a key enabling factor for choice editing rather than a barrier, because there is generally little difference between the price of sustainable options and the conventional options (especially with regards to MSC certified fish). The success of retailer B in promoting pouting as a successful alternative was due to both perceived quality arising from its 'sustainability' credentials, but equally due to its cheap cost. The success in choice editing fish reiterates the main finding of the Sustainable Consumption Roundtable (2006a) that the crucial enabling factor for choice editing is that products perform to the expected standards of the market: when price and quality fall within the normal range, any sustainability attributes become attractive to a consumer.

5.3 Barriers: Ideological Implications and Pragmatic Factors

5.3.1 Availability of Raw Material

Almaani et al (2004) mentioned that retailers can be prevented from sourcing sustainable products if there are concerns about the capacity of the supply chain to provide the greener product at scale. Confirming this, the **availability of raw material** was mentioned as a practical barrier to mainstreaming sustainable fish products. For example, the Co-op mentioned that any products sold must be available at large scale and with consistent supply, and this is not the case with species of fish that aren't fished commercially²⁴; neither for fish from MSC labeled fisheries. Small-scale and artisanal fishing, often considered a more sustainable method of production than industrial-scale fleet fishing, is inherently incompatible with retailers' mass purchasing procedures that involve economies of scale and include central sourcing and distribution systems and specific product-range categorization.

A secondary barrier arises as consumer demand for MSC labeled fish grows and the label is used in some instances as the basis for a retailer fish policy to choice edit non-MSC fish from the shelves²⁵. Increasing demand from retailers' means that fisheries certified with the label will have to source their products in larger amounts, which could potentially undermine the claims of their 'sustainable' label by encouraging overfishing. This is a good example of the 'Jevons paradox': the predicted environmental gains from fish conservation (removing certain species from the market and promoting other species or catch methods and areas) could become undermined if there is a relative increase in the amount of sustainable fish sold. The MSC 'Sustainable Seafood' label therefore faces similar criticism to that given to the fair-trade coffee label if scaled up to become mainstream.

²⁴ In the EU, this is partly to do with by-catch rules under the CFP in the EU and is subject to ongoing political debate with regards to reforming the policy (Agnew et al, 2009).

²⁵ None of the retailers interviewed mentioned selling *only* MSC labeled fish as a current goal, but it has become a policy objective for other retailers such as Walmart in the USA. The standard is used as criteria to identify sustainable fish by 6 of the 7 retailers interviewed.

5.3.2 Consumer Demand and Competitive Factors

The logic of our economic system and the role of businesses within it provide extremely powerful incentives for businesses to encourage, not discourage, consumption (Tukker et al, 2006). For retailers who compete in the market based on price, not quality, and thus generate profits in the traditional 'choice provision' model of 'pile it high, sell it cheap', choice editing is extremely hard to justify. ICA mentioned explicitly that if choice editing means an overall loss of sales then it is not an appropriate policy tool. This was particularly salient for retailers operating in the lower market segments – Retailer B and Willys – who both argued that labeling schemes were better policy tools than choice editing. These retailers preferred to see choice editing as a process of transformation rather than an outright removal of products that would limit consumer choice. Furthermore, the argument was made that choice editing is not a viable long-term strategy to solve all product related problems and there is equally a need to **transform**, rather than remove, products and to work with suppliers to improve fishing standards over time rather than simply delisting them. A **negative brand image** can easily be generated if there is little legitimacy and trust in retailers' decisions to delist products, which has the potential to be viewed by the public as a *'brutal clubbing of suppliers'* if the issues surrounding the retailers' actions are not well-understood (Retailer A, personal communication).

There was consensus that market-based **consumer demand** is the major driving factor when deciding what to stock and remove within shops – *'consumers know what they want and we are there to provide it for them'* was the mantra of the interviews. Willys and Retailer B both emphasized that they exist to please the customer and meet their needs; ICA mentioned that the driver for *all* their sustainability work is the requirements and expectations of their consumers and Coop also mentioned that high demand for sustainable options is the only thing that would allow them to 'kick out' conventional products. Most retailers thus continue to rely on individual consumers as the driving force to create demand for change in a traditional 'choice-provider' model, rather than driving change themselves (SDC, 2006a). Perhaps this is unsurprising in the retail sector, as Gunningham and Rees (1997:391) argue that the closer the industry is to final consumer goods, the greater the market pressure will be to conform to consumer demands.

Retailer B, who mentioned that their most popular fish is Cod, presented a good example of the limitations of choice editing. Cod is considered to be unsustainable due to its status as an over-exploited species. However Retailer B feels that they have no scope to remove it from their shops due to high consumer demand for cheap fish. Their solution is to promote alternative fish species alongside conventional Cod based products (i.e. using choice architecture) rather than remove it entirely from the shop. The absence of government disincentives for damaging products such as cheap Cod makes it difficult for retailers to act voluntarily and reinforces the call for the government to play a bigger role in using regulatory force to enable choice editing (SCR, 2006abc).

5.3.3 Ideological Risk

The idea of limiting consumer sovereignty is still unpopular with retailers who mostly agree that consumers have a 'right to choose' for themselves, with the knowledge that many will not accept a limitation on this right for the cause of sustainability. Choice editing for sustainability here differs from choice editing for health issues due to a clearer consensus on the 'greater good' with regards to health. This unwillingness to choice edit based on **ideological** risk reiterates the general discussion on the role of consumers in environmental policy – typecast by the 'choice provider model', it is the task and moral duty of the consumer to create a demand-pull for sustainable development and there is a general belief among policy-makers that it is the 'heroic' green consumer who will ultimately push society towards a more sustainable future by making the right choices in the market (Moisander et al, 2010).

However, some retailers did mention an awareness of the limitations of ethical consumerism. For example, Retailer A agreed that they bore the responsibility of assisting consumers to make informed choices, but because '*they spend ten seconds in making a purchasing decision, you have to reduce the complexity somehow*'. In this case, maintaining the **illusion of choice** is an important enabling factor for choice editing for sustainability (Maniates, 2010). Consumer expectations are managed so that when retailers remove fish products, consumers feel good about these actions, linking them to a positive image and a sense of well-being (Wilys, Personal Communication). To some extent, again this rests on consumers' existing awareness and interest in sustainability issues, and hence is easier for retailers who already have a strong green image and market base to make consumers feel good about product removal on the basis of sustainability.

An inherent problem hence arises: retailers need their consumers to accept choice editing on the grounds of sustainability before they are able to practice it, or they risk losing business on the perception of being too restrictive on autonomous consumer choice. At the same time, as Lin et al (2009) suggest, we must address a wider range of customers than the deep green segment if we are to achieve any meaningful change in the systems of production and consumption. An estimated 5% of UK consumers are 'ethically committed', which means that 95% of consumers are not (Hobson, 2004). However, the most likely consumers to accept choice editing for sustainability as a limitation on their sovereignty *are* the 5% 'deep green segment', not the 95% mainstream consumers. As choice editing is aimed primarily at mainstream consumers to effect change, a large obstacle arises in terms of mainstream consumers' willingness to accept restrictions on their freedom to consume based on environmental criteria.

This finding reflects Valor's statement that '*Companies will only incorporate social and environmental objectives in their agenda when economic agents show that they also seek these values by incorporating them into their economic decisions*' (Valor, 2005:191). Again, this raises the issue that the case for choice editing rests on wider knowledge, norms, values and expectations in society with regards to sustainability. Hence the biggest argument for choice editing – mainstreaming sustainability - is also its biggest limitation. Mainstream consumers need businesses to take responsibility for

their products because ultimately, most consumers are driven by price and habits rather than ethical considerations (Jackson, 2006). However, until mainstream consumers are somewhat driven by ethical considerations, there is no business case for retailers to act. This, then, is the ‘Catch-22’ of the choice editing model.

5.4 Summary

Drawing on the findings from the empirical study, Table 7 represents the strengths, weaknesses, opportunities and threats to choice-editing as it is used in practice with regards to systematically removing endangered fish from the marketplace.

Strengths	Weaknesses	Opportunities	Threats
<p>Has the potential for transformative change in the food production and consumption system if practiced by strategically placed, powerful retailers.</p> <p>A business case can be developed through creating a positive brand image and eco-efficiency gains can be made by conserving critical natural capital to ensure long-term economic viability.</p> <p>Reduces the individual burden on the consumer and addresses the limitations of green consumerism</p>	<p>The complexity of product based sustainability issues means choice editing needs systematic indicators of sustainability criteria and agreed baseline product standards to identify – and therefore mainstream -sustainable products. This is ideally the role of government, not business.</p> <p>Changing mainstream consumption still ultimately rests on green consumer values pushing the agenda forward.</p>	<p>Civil society institutions and the government play a critical role in disseminating cultural norms and values in society around different products based on sustainability criteria.</p> <p>Regulation, or the threat of regulation, can also drive choice editing forward.</p>	<p>Government and retailers are unwilling to interfere in matters of consumer autonomy.</p> <p>It is unlikely that ‘green values’ in consumption matters will ever become mainstream (i.e. above price and quality).</p> <p>The traditional model of provision of choice persists.</p>

Table 7: SWOT analysis of Choice Editing.

6 Discussion

This chapter discusses the findings of the study from a broader methodological and theoretical perspective, raises a number of issues for further consideration and makes recommendations based on the findings.

6.1 Generalisation of Results

The study should be read critically due to the low response rate and the small sample size of data. Data was based on only 7 respondents' interviews, thus the values and knowledge of the particular individuals spoken to – although representing particular companies – has no doubt affected the results. A more in-depth investigation of choice editing as it is operationalized within a particular retailer, for example by interviewing staff from different departments, would be useful to further investigate the opportunities and limitations of the practice. This makes generalization of the results to the sector as a whole somewhat difficult. However, if the retailers in the study are taken by market share, as opposed to sheer number, the implications of the results become more meaningful – over 50% of the food retail market in both Sweden and the UK are represented by the retailers in the study (Table 4). As such, a certain generalization of the results can be made with regards to the sector within an EU context and is particularly relevant to Swedish and UK food market.

A potential legal barrier to choice editing of goods originating from outside of the European Union framework need be mentioned here. If retailer product or ingredient bans are enforced by regulation, they may be in violation of international trade rules imposed by the WTO framework. This 'grey-area' needs critical investigation from a legal perspective as there have been in the past several challenges in the WTO system with regards to barriers to trade based on environmental production and process standards²⁶ (deMan and Burns, 2003).

Further investigation is needed to see if the results apply to other specific sectors of retail (for example clothes or electronics). The results of this particular study on fish may not be directly applicable to other product categories and more in-depth analysis and testing of criteria and theories generated are needed to determine the importance of different product-related variables such as availability of alternatives, sustainability indicators and tradeoffs and product price and quality differentials. For example, meat and dairy products have different sustainability issues associated with them, therefore the argument for choice editing might be harder to find – meat stocks are not visibly 'depleted', there is no well-recognised or understood labeling scheme for either meat or dairy, and the cultural value of meat with regards to aspirations and progress is likely harder to change (Lang, 2010b). However, the findings do suggest that choice editing has the potential to be a

²⁶ Examples of trade-environment disputes with regards to fish products can be seen in the infamous Tuna/Dolphin and Shrimp/Turtle debates. Extensive discussion on trade-environment relations are outside of the scope of this thesis, for more detail on environmental governance and international law, please see Sands (2003).

valuable tool to address the fact that producing and consuming less meat and dairy is a critically important strategy to move the agri-food system towards greater sustainability (FAO, 2006; Tischner et al, 2010).

6.2 Producer Concerns

Just as consumption can never be isolated from production, consumption policy cannot be isolated from production policy. The macro effects of choice editing and in particular the implications it has on producers needs attention. The greening of food practices in rich countries could very well result in new inequalities within global food chains (Spaargaren, 2003). As mentioned in the literature, the product assortment of any retailer is the result of multiple competing interests and powers. Disparities of power are often played down in an approach to get business on board the sustainable development boat in a way that does not undermine their profit-seeking goals, but this may undermine any democratic concerns for social and environmental risks, particularly from the point of view of the producers who lie at the end of the production chain but have little power in relation to large, oligopsonic retailers (Benn and Dunphy, 2005).

If choice editing means the delisting of small-scale producers or suppliers, it runs the risk of becoming an eco-centric rather than holistic concept which ignores the wider social and economic impacts downstream in the supply chain. One way to incorporate economic producer concerns into the choice editing model is to support existing producers to transform their production to more sustainable processes – thus creating ‘sustainable products’ – rather than outright delisting or removal.

With regards to fish, conflict and economic hardship within the European fishing industry have been rife for many years (MCS, 2007). If retailers quickly started to deprive fishermen of their potential catch this could cause catastrophic economic collapse in the sector (especially in poorer countries). Furthermore, retailers’ sourcing actions are heavily constrained by the system of species-based fishing quotas and total allowable catch devised by the EU. Ultimately, consumer and retailer demand for sustainable seafood has the potential to influence both fishing industry practices and fisheries management policy (MCS, 2007). However, retailers’ (and governmental) actions to choice edit need to be part of a broader transformation in the fishing sector that incorporates existing producers and fisheries ²⁷.

6.3 The Importance of the Government

The traditional approach to implementing sustainability policy in advanced capitalist societies plays out in a restricted paradigm that places more imperative on corporate interests than on goals and values in the public sphere (French, 2002). Neo-liberal deregulation has succeeded in opening the

²⁷ One innovative policy approach to reducing pressure on endangered fish stocks consistent with choice editing while also considering the economic concerns of fishermen is a recent plan devised by the EU fisheries chief, Maria Damanaki, that pays fishermen to catch plastic rather than fish, with the added benefit of cleaning the marine ecosystem (Harvey, 2011).

way for national governments to support strategies of economic growth set by private retailers, rather than vice versa (McMichael and Freidman, 2007). This form of governance goes some way to explaining why retailers are often not bound to regulatory standards but instead rely on voluntary initiatives for standard setting (Hobson, 2004). The roll-back of the state explains the importance of NGOs in creating product standards, awareness campaigns and disseminating values in society, doing the work that traditionally the state was supposed to provide. However, the findings also show that retailers' both want and need Governmental intervention on products to enable them to practice choice editing for sustainability more widely and remove more unsustainable products from their shelves. Change is ultimately driven by policy, because regulations, standards, subsidies and market based instruments have the ability to put much more pressure on larger groups of actors than changes made voluntarily by business or consumers (Tischner et al., 2010).

As fair-pricing is an essential enabling factor for choice editing, it particularly warrants further attention from governments. From a consumer perspective, economic income defines the choices we have the capability to realise, thus only the richer echelons of society have the ability to choose sustainable products if they are more expensive than regular items. Limitation in individual income also becomes a limitation for the retailer, who cannot mainstream more expensive items if they are to retain their consumer base. Good fiscal intervention by governments has the opportunity to free consumers and retailers from the confines of these pricing issues. This could be a useful underpinning to argue for the implementation of progressive eco-taxes on products where the price of the sustainable option outweighs the unsustainable option, to enable the unsustainable option to become more competitive and thus allowing price-constricted consumers to consider sustainability considerations in their purchasing (Michaelis, 2003). One mechanism for doing so could be the incorporation of environmental externalities into pricing procedures (Bansal and Kilbourne, 2001).

6.4 The Importance of Civil Society

The actions of civil society institutions such as NGOs and the Media are critical in raising the sustainability awareness in society that allows retailers to remove unsustainable choices from their shops. Hobson (2004) argues that the currently small amount of ethical awareness in consumption issues is a result of the inability of consumers to make connections between consumption and social and environmental outcomes. Therefore, education on the impacts of global commodity chains should be a key objective for government and civil-society. This, perhaps, is the remit of 'sustainability science', to nurture trans-disciplinary and systems thinking on the meaning of consumer choice, progress and sustainability.

For this purpose, civil society campaigns must go further than information provision through labeling schemes and social marketing campaigns and instead need to be pervasive in enabling public discussion that questions the idea of consumer choice as a way of measuring societal progress. As such, policy arising from public discussion could give democratic legitimacy to limits on consumer choice on the basis of sustainability. Autonomy means that individuals feel free under laws, even though they are constrained by them, because it is they who have created the law in the first place (Fuchs and

Kalfagianni, 2009). Thus deliberative democracy could ensue a radical reconceptualization of consumer autonomy as inclusive of certain restrictions on consumption. Radical reflection driven by civil society could bridge the consumer-citizen divide, and would nurture choice editing for sustainability's liberatory potential whilst at the same time would challenge its potential use as a tool of surreptitious control. After all, supermarkets are not democratically elected, so who do we give responsibility to edit our choices for us? Opening up these discussions to consumers would counteract the normative tendency of promoting 'sustainable development' through choice editing without explicitly defining the goals. This echoes Maxey's (2007) call for the need for a public dialogue in which we can consider collectively what we want to sustain for future generations, and how to go about it; recognizing that environmental protection is not necessarily a self-evident good that everyone supports (Jones et al, 2008).

6.5 Strong Sustainable Consumption

In the free-market, retailers' ability to choice edit voluntarily rests on creating commercial interest. The elephant in the choice-editing room is that the creation of a responsible brand image is ultimately used to attract consumers, which in business-terms means selling more goods and therefore consuming more resources. The ability to remove products is always dependent upon there being a sustainable alternative to replace them with, which essentially subsumes the idea of 'stronger' sustainable consumption, consuming less (Michaelis, 2003; Fuchs and Lorek, 2002). It could be argued that choice editing when implemented by governmental bans and minimum product standards is more effective for 'strong' sustainability than voluntary editing because it does not require the business case of resource-dependent profit. However, it is still very politically unpopular due to the ideological implications of limiting individual consumer choice.

This refers to a wider debate around the fact that retailers and governments couch sustainable development work in the paradigm of economic growth. Using a macro-perspective, the use of choice editing as a tool for economic growth is an oxymoron because endless material growth may not be possible in the confines of a finite environment (Daly, 1997). Focusing on economic growth represents a limited definition of progress but is the dominant social paradigm within which the food provisioning system and retail sector exist (Bansal and Kilbourne, 2001). It remains to be seen whether strong sustainability values – where growth represents qualitative improvements within the capacity of the ecosystem - and economic development can be resolved. Many argue that the ridge between economic growth and environmental protection could be too deep to bridge and this is particularly poignant when we view sustainable development from the perspective of business actors who quickly become locked-in to the economic system of production and consumption (Benn&Dunphy, 2005).

6.6 Recommendations

The case of fish shows that the rise of choice editing is partly indicative of retailers responding reactively to shifting values in the public sphere with regards to an 'emotive' product. However, choice editing should also be used pro-actively to shape public values with regards to items that have highly negative impacts on social or environmental systems. Currently, choice editing

links policy interventions which aim to green markets and make sustainable consumption easy, however it makes no effort to change the knowledge, values and attitudes of consumers themselves (Scholl et al, 2010). Structural shifts are no replacement for instigating sustainable lifestyles that encourage more challenging pro-environmental behaviour in other consumption domains such as mobility or energy use (Power and Mont, 2010b). The usefulness of choice editing is that it does not rely on individual behaviour change for sustainable outcomes, but if consumers rely on retailer and government responsibility alone, it could block the deeper and more fundamental shifts in mindset and worldview that are urgently required for sustainable development (Fuchs and Lorek, 2002). Therefore the most effective model for change is for retailers to practice choice editing 'loudly' and simultaneously with information provision and choice architecture measures.

Voluntary choice editing for sustainability should continue to be considered a powerful tool to be used by retailers to promote sustainable products, particularly in the absence of government regulation and minimum standards. However, it is important to recognize the 'Catch-22' of the choice editing model: the limitations of a 'choice-provider', green consumerism approach mean that business needs to act on behalf of non-ethical consumers if sustainable consumption is to be achieved. At the same time, the norms and values of sustainability issues need to be prevalent and well understood by the majority of consumers before business can justify removing items from the shelves. To promote voluntary retailer action, there is a greater role for civil society and social movements in creating new public dialogues, discussions, norms and values with regards to sustainability and sustainable products in civil and economic life. Civil society institutions also have a major role to play in raising questions on the meaning of increased consumer choice with regards to the well-being and goals of society.

Strong governmental support and regulation are needed for retailers to incorporate sustainability into their sourcing criteria whilst remaining competitive, and thus will be more effective than reliance on voluntary retailer action alone. Governments should safeguard that product based policy be progressive, consist of continually moving goals and is integrated with other policy areas²⁸. Retailers that internally incorporate eco-centric values and long-termism into their business models are critically important to shift the norms of industry and actively create markets for sustainable products; it is these pro-active companies in particular that should be supported and rewarded by the government. NGOS can also lobby governments to take action, and there is perhaps great potential for the public and private spheres to work together to standardize indicators and product standards that enable the removal of poorly performing products.

No matter who is driving choice editing, retailers should consider the whole supply chain when they employ its use, particularly considering the producer impacts of removing products, and wherever possible working with producers to transform their production methods rather than outright delisting.

²⁸ In the case of fish it would need to be integrated with the Common Fisheries Policy; for other product categories this could include agricultural policies, climate changes policies and so on, based on the relevant sustainability criteria.

7 Conclusions

The findings show that the creation of a business case for retailers to choice edit voluntarily ultimately still rests on the values and actions of individual agents in the marketplace. However, it has also become clear that food policy solely focused on the consumer as the driving force for change is not sufficient to tackle the environmental and social issues endemic to the global food provisioning system. This is not to undermine the fact that acts of green-consumerism are important in shifting consumption systems to more sustainable levels, but a vast majority of consumers do not (or indeed cannot, for price and availability reasons) take sustainability issues into consideration. Focusing on the consumer alone ignores the wider limitations on the role and responsibility of business and the government to safeguard the planets ecosystems.

Ultimately, the role of public policy on sustainable consumption should allow business, government and consumers to move simultaneously and progressively towards consumption patterns that lie within the planets critical natural boundaries. Environmental policy development should be a dynamic, iterative process that involves assessment of complex sustainability problems, creation of minimum product standards, fiscal incentives for sustainable products, bans on the worst performing products, target setting and monitoring. Within this approach, retailers, governments and consumers all have a role to play in transforming consumption and production systems to ensure that ecosystems (and social-systems) are protected and that natural capital stocks are not depleted beyond repair. Choice editing is one tool of many that can be utilized by retailers to take a lead on addressing this goal, and appears to be particularly effective with regards to emotive products such as fish.

The role of civil society is implicit in retailers' practice of choice editing for sustainability. Media and NGO campaigns put pressure on retailers to remove poorly performing items, whilst also driving the issues in the public sphere, which in turn means that retailers need to choice edit in order to meet consumer demands that the issues are dealt with instore. Their role is absolutely invaluable for raising awareness and forwarding the agenda of sustainable consumption.

It is important to figure out where choice editing is and isn't an appropriate tool to use, taking into consideration price, availability of raw material and producer issues. Removing unsustainable items from shops is not a panacea for sustainable development. It can be difficult to find a business case, it requires an-already high acceptance of sustainability issues in society, it downplays the role of consumer behaviour change, and it does not explicitly address 'strong' sustainable consumption. The prevailing doctrine of consumer choice means that retailers are expected to give the consumer the individual right to 'choose sustainability'. Being seen to undermine this right through choice editing is complicated from a business perspective, and is a political minefield. The significant ideological and pragmatic limitations to choice editing thus mean that it is not a silver-bullet solution in itself. The

main challenges for retailers in scaling up the practice of choice editing are twofold:

1. Agreement on what is and isn't sustainable (for example, based on scientific information and indicators with regards to the environmental or social issues connected to different product categories; and the ability to compare products on standardized environmental and social criteria)
2. Mainstreaming the market for sustainable products from the ethical consumer to all consumers, and the ideological implications of such actions.

When choice editing is used as part of an integrated approach to framing consumer choice to promote sustainable products (as represented by Figure 3), it does have the potential to make gains beyond the 'arms-length governance' of the state and the continued focus on green consumers as the agents of change. It is recommended that choice editing be used by retailers to remove the worst performing (most environmentally or socially damaging) products from the market, while acting simultaneously as choice providers to improve supply chain innovation and increase the range of sustainable options available, and choice architects to encourage and promote the consumption of more sustainable products.

7.1 Issues for further research

As choice editing is a relatively new concept, there are many issues that warrant further attention.

- It would be useful to conduct a study as to the potential of choice editing with regards to a broader range of products, in particular meat and dairy, taking into consideration the enabling factors of price, raw material availability, NGO involvement and product-based standards and indicators.
- A case-study on the impacts of retailers' choice editing actions further down the supply chain, particularly on producers, would be beneficial to pick up any negative side-effects. This could be done with the case of fish, for example, and could take an environmental justice perspective.
- The broader issue of how government regulation can be developed in a politically feasible manner to enable consumer acceptance of choice limitation needs to be addressed. Similarly, research on ways that civil society organizations can disseminate sustainability values in society and raise questions about the meaning of choice would be beneficial.
- A larger study involving a wider and more extensive range of companies would be useful to understand the sectoral approach to choice editing and to understand the relative importance and extent to which 'front-runner' companies drive the agenda. Differentiating between the factors driving choice editing as a re-active and pro-active policy would be interesting, and this could also include geographical variations.

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9 Appendices

Appendix 1: List of Interviewees

Country	Name of Retailer	Name of interviewee	Position
UK	Retailer A	n/a	Head of Sustainable Sourcing
Sweden	Coop	Mikael Robertsson	Environmental Manager
Sweden	ICA (Royal Ahold)	Maria Smyth	Head of Environment and Social Responsibility
UK	Retailer B	n/a	Corporate Responsibility Manager
UK	The Co-op	Ian Burgess	Group Quality Control Manager
UK	Waitrose	Quentin Clarke	Head of Sustainability and Ethical Trading
Sweden	Willys (Axfood)	Janne Krantz	<i>Head of Marketing and Sustainability (check)</i>

Appendix 2: Overview of Retailers in Study

*Coop (Sweden)*²⁹

Coop is the food retail business of The Swedish Cooperative Union (KF), a federation of 47 consumer cooperative societies in Sweden with over 3 million individual members. Coop accounts for 21.4% of the entire Swedish grocery retail sector. Coop has 4 different store formats: chains like Forum (hypermarket), Extra (discount), Konsum (the most popular store in a supermarket format) and Nära (corner store). They sell over 2600 organic lines, the largest assortment of organic products in Sweden, many under their own private label brand 'Anglamark'. Overall, they sell a very high volume of own brand products (Personal communication, 2011).

ICA

ICA is a Scandinavian group that is 50% owned by Dutch Royal Ahold. In Sweden they own 1,359 stores, mostly supermarket formats, but also consisting of small convenience stores and large hypermarkets. Net sales in 2009 were 59,003 million SEK (ICA, 2009). All ICA stores are owned by store managers, thus each store has a certain amount of control over the assortment that it sells; decision-making is split between the store manager and the corporate HQ. However ICA has a central assortment of own-label products that is the basis for different ICA stores. This central assortment includes a brand of organic foods called 'I love Eco'. ICA is working actively to expand its range of sustainable alternative and uses labels such as MSC, FSC, Fairtrade, KRAV and EU Organic help customers to identify products that are produced responsibly. ICA has an extensive ethical policy and is part of the UN Global Compact. For the purpose of this thesis, it is their central assortment of goods that is discussed with regards to choice editing.

*The Co-operative (UK)*³⁰

²⁹ <http://www.coop.se/Globala-sidor/In-english/About-Coop/>

³⁰ <http://www.co-operative.coop/food/ethics/>

The Co-op holds around an 8% market share in the UK (USDA, 2009) and is a forerunner in sustainability issues to the extent that they have named themselves 'the UK's leading responsible retailer'. They are well-practiced in choice editing, being the first to lead the UK supermarket sector in fair trade, bringing it into the main stream and challenging the existing commodity supply chain format (Barrientos and Dolan, 2007). Initially their strategy was to adopt fair-trade labeled brands (e.g. CafeDirect coffee); but since 1999 the company has focused on the development of their own brand range. Entire ranges of Co-op brand products have been converted to fair trade including all block chocolate, tea and coffee. Converting the whole chocolate range to fair trade effectively doubled the national fair trade chocolate market (then valued at £3 million). They are the first – and largest - UK retailer to sell exclusively free-range eggs.

Willys

Willys is a Swedish discount retailer owned by Axfood AB. They have a wide range of own brand products and currently stock the cheapest organic range in Sweden in their 120 stores (Personal Communication, 2011). Being a discounter, they compete on price rather than quality. Willys has an ongoing partnership with the Swedish Society for Nature Conservation (Naturskyddsforeningen) and is accredited with their 'Bra Miljöval' label for environmentally responsible retail. As a result of this partnership they have recently started to provide environmental information on their shelves to help consumers make greener choices.³¹

Waitrose

Owned by the John Lewis retail partnership, Waitrose offers a broad range of high quality products to an upper-middle class customer base: generally, stores are located in areas with where consumers with a higher-than-average disposable income live (USDA, 2009). They own 185 stores in the supermarket format and stock a wide range of organic and fair-trade items. Waitrose generally competes on quality rather than price, although they have recently introduced an 'essentials' range of basic items. They have developed a comprehensive 'Responsible Fishing Policy'³².

Retailer A

Retailer A is a large British supermarket based on providing every day, low price goods. They focus their competition on price rather than quality, and only operate in a large supermarket/hypermarket format, thus focusing on the lower end of the mass-market. A typical supermarket carries around 30,000 product lines. Retailer A has a strong own-brand portfolio, with sub-brands including discount products; everyday food items; healthy products (fat, salt, sugar and calorie controlled); and luxury or premium items.

Retailer B

Retailer B is one of the largest retailers in Europe. It has over 2000 stores in the UK and operates in 6 different store formats from corner-store to large box- style hypermarket outlets. Some stores have over 40,000 products, with over 1200 lines organic and around 100 fair trade products. Retailer B is also Britain's' biggest fishmonger, with over 480 fish counters and 2500 staff dedicated to the purpose. All canned tuna is 100% dolphin friendly and certified by the Earth Island Institute, and all own brand tuna will be Pole and Line caught by 2012 (Personal Communication,

³¹ <http://www.axfood.se/en/About-Axfood/News/News-archive/Willys-helps-customers-to-make-sustainable-choices/>.

³²http://www.waitrose.com/content/waitrose/en/home/inspiration/food_issues_and_policies/sustainable_fishing/responsible_fishing.html).

2011). This retailer stocks several different own-brand lines aimed at different market categories: very cheap, basic discount items, specialist 'free-from' and healthy eating ranges and also a premium-quality luxury range.

Appendix 3 List of Interview Questions to Retailers

GENERAL:

1. Could you introduce yourself and your role within the company?
2. What does sustainability mean to you, and how is this incorporated into the choice of products that you sell?
3. How do you address sustainability concerns upstream and downstream in the supply chain?
4. What are the main barriers to incorporating a strong sustainability agenda within the company?
5. Who is primarily responsible for ensuring that the food products available in shops are not damaging to the environment (e.g. by emitting large amounts of greenhouse gases in their production and processing) or socially damaging (e.g. produced under substandard labour conditions)?
6. Have you ever delisted products or ingredients based on environmental or social criteria? If yes, please provide examples. What alternatives are provided? What information were these decisions based upon?
7. Please could you comment briefly on the barriers that exist to removing unsustainable products from your shops, especially with regards to consumer demand?
8. Which do you consider more important: sourcing and promoting new products with sustainability benefits, or removing products that have known impact upon environmental or social systems? Why?
9. How do you communicate complex sustainability issues to your customers?

FISH:

10. Have you practiced choice editing (removal) of fish products?
11. Which products have you removed?
12. Based on what criteria?
13. How would you define sustainable and unsustainable fish?
14. What are the drivers to removing fish products?
(Image / Brand awareness, Consumer demand, NGO demand / campaigning, Investor demands, Employee demands, Media exposure on the problem etc.)
15. What barriers have you faced in doing so? How do you respond to consumer demand for unsustainable fish?
16. How do you deal with the potential competitive loss associated with the removal of fish products?

17. Has choice editing/delisting been due to any government regulation (national or EU), or product standards? What about forthcoming regulation? If not, what policies would be needed to facilitate the removal of unsustainable fish from the shelves?
18. Are/were suppliers consulted before you stopped selling these products?
19. What information channels do you use to obtain relevant information on fish sustainability?
20. Do you work with NGOs or other third parties with regards to the standards of your fish products?
21. Do you have a code of conduct for fish suppliers, or a specific fish policy? If so, are these updated over time?
22. Are fish suppliers monitored? By whom?
23. What alternatives do you offer to threatened fish species? Is there a price difference between the removed item and the substituted item? Are these alternatives promoted, and if so, how, for example are they subsidized?
24. How is information on sustainable fish and possible delisting communicated to the customer?

Appendix 4: Marine Conservation Society ‘Fish to Eat and Fish to Avoid’ list for Retailers (as of January, 2011)

Species	Eat	Avoid
Alaska or Walleye Pollock	● Alaska, Bering Sea, Aleutian Islands	
Bib or Pouting	●	
Black bream, Porgy or Seabream	●	
Clam	● Farmed (Manila, American Hardshell), Carpet shell	
Cockle	● Hand gathered	
Cod, Atlantic	● NE Arctic, Eastern Baltic	● Irish Sea, Faroes Bank, Rockall, W.Scotland, Greenland, Norwegian Coast, North Sea, Western Channel
Cod, Pacific	● Alaska longline	
Coley or Saithe	● North Sea, West Scotland & Rockall, NE Arctic	
Crab	● Spider, pot-caught	
Dab	●	
Eel		● European & Conger
Flounder	●	
Gurnard	● Grey & Red	
Haddock	● NE Arctic, North Sea	● West Scotland & Faroes
Hake		● From Spain & Portugal
Halibut	● Farmed (onshore system)	● Atlantic, wild caught only
Herring or Sild	● Norwegian spring spawning, Celtic Sea, North Sea	● West Ireland & West Scotland
Ling		● Avoid trawled
Lobster	● Western Australian rock	● From Southern New England stocks
Mackerel	● Handline, driftnet caught & North Sea	
Mussel	● Farmed	
Oyster	● Farmed (native (flat) & Pacific)	
Pollack or Lythe	● Line caught	
Plaice		● Celtic Sea, W. English Channel, SW & W Ireland
Prawn	● Tiger & King (organic-certified farmed or zero input system)	● Tiger & King Prawns; wild caught & non-certified farmed
Ray		● Small-eyed & Thornback from Bay of Biscay; all Blonde, Sandy, Shagreen & Undulate
Red Mullet	● From NE Atlantic	
Salmon	● Pacific (5 Species), Atlantic (organic farmed)	● Atlantic, wild caught
Sardine or Pilchard	● From Cornwall	
Scallop	● Diver caught King or otter-trawled Queen	
Scampi or Dublin Bay Prawn		● From Spain & Portugal
Seabass	● Line & Gillnet caught	● Pelagic trawled
Shark		●
Skate		●
Sole (Dover/Common)		● Irish Sea
Sole (Lemon)	● Otter trawled, seine net caught	
Squid	● European; Jig caught	
Swordfish		● Indian Ocean, Med., S. Atlantic, NW Pacific
Tilapia	● Farmed (organic or closed recirculating system)	
Trout	● Rainbow; organic farmed or freshwater ponds	● Brown or Sea; wild caught from Baltic
Tuna (Albacore)	● Pole & line or troll caught from South Pacific	● South Atlantic
Tuna (Bigeye)		● Indian, Atlantic & Central West Pacific
Tuna (Bluefin)		●
Tuna (Skipjack)	● Pole & line; Pacific, W. Atlantic or Maldives	
Turbot	● Farmed (onshore system)	● Beam-trawl caught

Appendix 5: Retailers Actions to Choice Edit Fish Assortment

RETAILER	RETAILER A	RETAILER B	COOP	THE CO-OPERATIVE	ICA	WAITROSE	WILLYS
DELISTED BY SPECIES	Y – based on the MCS 'threatened list', e.g. Orange Roughy	N	Y -based on internal fish policy, e.g. Eel	Y - None on IUCN red list or MCS threatened list	Y - None from WWF red list	Y - they will not list any species where there is a common consensus that it is endangered or under threat.	Y - No fish on the IUCN red-list
DELISTED BY CATCH AREA	Y – No Cod or Haddock from the North Sea	N	Y - according to own criteria, especially with regards to IUU fish	Y - according to own criteria	Y - if referred to on WWF red list	Y	N
DELISTED BY CATCH METHOD	Y – <i>Moving towards only line caught cod and haddock (no defined target date)</i>	Y - Only sell 'dolphin safe tuna' certified by the Earth Island Institute and will only sell pole and line caught tuna by the end of the year (currently at 25%)	Y - Moving towards only pole and line caught tuna	Y - Only sell line caught cod and haddock, moving towards only pole and line caught tuna	Some dolphin friendly and line caught fish sold alongside fish from conventional catch methods	Y	N
INDICATORS OF 'SUSTAINABLE FISH'	MSC Standard, Earth Island Institute certified for tuna, and Global GAP certified for farmed fish.	Own criteria incorporating standards from MSC and MCS; Earth Island institute certification for 'dolphin-friendly' tuna.	Use own criteria generated by expert fishing group (including external scientists), based on ICES recommendations. Also use Krav (organic) and MSC labels and WWF recommendations.	Based on own comprehensive 'responsible fishing' policy that details how fish should be sourced: catch method, area of catch and details individual fisheries with particular indicators - in line with MCS standards. Follow Greenpeace guidelines to 'Remove the Worst, Promote the Best, Improve the Rest'. Recognise MCS, MSC and Earth Island Institute standards.	All stores must use an internally derived, centralised checklist of factors when buying seafood directly. Some fish sold with krav and MSC labels.	Stringent Sourcing Criteria'- they do not take the existence of a legal quota or minimum landing weight as evidence of sustainability, nor do they accept third party certification such as MSC, as such schemes are insufficient to cover the full range of fish sold. Fisheries must be able to demonstrate sustainable management of the stock through effective quotas based on scientific advice and stock assessments & should have provision for zone closures to allow protection of spawning and nursery grounds.	Willys uses criteria specifically from Naturskyddsforenigen (Swedish Nature Conservation Society). They stock Krav and MSC labelled fish.
KEY POINTS	Avoids sourcing MCS 'threatened species'. 25% of Fish sold are on either MCS or MSC 'Fish to Eat' Lists. 90% of Farmed Salmon MSC certified and from Global GAP certified farms. By 2011 will only sell 'sustainable fish' as recognised by the Sustainable Fish Partnership.	Provide a wide range of fish species (up to 40). All fish is labelled with species name, catch area and catch method. They stock 35 MSC labelled fish products. Consumers are encouraged to try new species by staff. Farmed fish adheres to an independently audited code of practice.	Swedens largest retailer of MSC labelled fish: 25% of fish products. Policy is developed by the environmental department and communicated to buying department. They have an expert fishing group that they have been working with for the past 3 years, which meets twice a year with scientists who together develop a 'fish list' that outlines which species, methods and areas are ok to source from at that time. This creates a list of 'fish to sell' - if fish are not on that list, then they will not be sold'. Also possibility to source locally caught fish on a shop-by-shop basis.	The policy is developed by 'Fish Sustainability teams' in conjunction with external stakeholders and is updated continually; sourcing standards changed as 'the external dynamics of the marketplace evolve'. Auditing and monitoring of suppliers is conducted and NGOs and other institutions are consulted on a regular basis, e.g. Regional Fishery Management Organisations	ICA and the WWF have been in partnership for 15-20 years and ICA are currently working to edit their fish policy so that it complies with the recently updated WWF red-list. ICA sells 12 MSC labelled products.	Waitrose cited that it is easier to delist fish if a good alternative is available, but also expressed a willingness to delist fish if they are threatened and there is no alternative.	All fish is delisted primarily to fulfill the criteria to obtain Naturskyddsforenigen's 'Bra Miljoval' label for sustainable retail stores. Willys also sells 10 MSC labelled products.

¹ The list is online at: http://www.coop.se/Globala-sidor/om_coop/Miljo-och-samhalle/Coops-fisklista/

<p>DRIVERS</p>	<p>Competition between retailers, Brand image of 'responsibility', Lack of good regulation by governments in fisheries management has '<i>forced retailers to get involved</i>'</p>	<p>Negative publicity by recent media campaign that portrayed retailer as '<i>not doing enough</i>' - need to rebuild consumer trust in the brand.</p>	<p>Internally driven - in the mid-1990s, declining fish stocks came to their attention and they felt within the company that they should voluntarily address the issue to a greater extent than the legal framework dictated at the time. It also creates a positive brand image.</p>	<p>Image - the Co-op received a bad result compared to other retailers in a survey on sustainable fish conducted by the MCS a few years ago; 2009 they came top of the same survey. External pressure and recent media publicity on sustainable fish has driven the move to only pole and line caught tuna, but it also fits in with their brand values and image.</p>	<p>Brand image - recent media attention has been given to sustainable fishing and consumers expect ICA to take responsibility with regards to these issues</p>	<p>Internally driven, investment in protecting natural resources to ensure the fishing industry does not collapse in the future; they do better commercially by taking this stance and practising choice editing</p>	<p>Obtaining the Bra Miljoval label</p>
<p>BARRIERS</p>	<p>Delisting costs sales. Lack of alternative sources of fish.</p>	<p>Best selling species - cod - is widely regarded as 'unsustainable' but continues to have high consumer demand</p>	<p>Lack of progressive regulation, very keen not to delist suppliers but are prepared to do so if production/sourcing standards are not satisfactory after a certain period of time.</p>	<p>Scale is a barrier to selling alternative species of fish - there must be consistency of supply to operate a central sourcing and range specification.</p>	<p>They still need to provide a good choice of fish within their assortment as this is what consumers expect.</p>	<p>None mentioned</p>	<p>Price - Willys is a discount store so they are not generally willing to remove affordable products from sale and replace them with higher priced items. They have seen loss of sales from lack of a good alternative, e.g. to their delisting of conventionally reared tiger prawns.</p>
<p>ENABLING FACTORS</p>	<p>External sources: Data is gathered from suppliers on different kinds of fish, this is put into an external database and is assessed by an NGO who provide guidance and advice as to whether they are sourcing the right products from the right fisheries</p>	<p>Consumer demand for sustainably sourced fish; Independent labelling schemes and partnerships such as the MSC label and Earth Island Institute label give legitimacy to their actions</p>	<p>NGOs help with the fisheries analysis and allow them to understand complex data and communicate this to customers. MSC and krav-labelled fish are generally no higher in price than standard options</p>	<p>The Co-op only sells a small number of fish products so they are able to manage a comprehensive policy. The company has high levels of consumer trust and a green brand image, driven by its comprehensive sustainability agenda and ethical focus.</p>	<p>Consumer demand for sustainable options and expectation for choice editing of the fish assortment in-store. Labels and point-of-sale information also enable this.</p>	<p>Choice editing is expected by customers and is 'totally in line with brand values'.</p>	<p>Willys is only able to choice edit due to a generally good understanding in Swedish society about the 'fish issue', people are well informed about the consequences of overfishing and consumer trust allows them to remove fish from their shops for this reason. They mention that keeping customers informed about what they are doing is very important to maintain trust and help customers feel good about the actions the retailer has taken.</p>