The Influence of Secondary Standards on Pesticide Use

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Figure 1: Importance of Various Labels/Phrases When Selecting Foods and Beverages
For three quarters of consumers "fresh" is very important when choosing foods and beverages.

- Fresh: 76%
- Pesticide-free: 48%
- Hormone-free: 35%
- Natural: 32%
- Certified humane: 31%
- Origin of ingredients: 28%
- Locally grown: 23%
- Sustainable: 21%
- USDA Organic: 19%
- Fair trade: 18%
- Seasonal: 17%
- Free range: 16%
- Organic: 15%
- Grass-fed: 14%
- Heirloom: 5%

Base: All respondents (n=2161).
Source: The Many Faces of Organic survey, February 2008. Top 2 Box based on 7-point scale ranging from "Not at all important" (=1) to "Extremely important" (=7).
What are consumers hearing?

7 Foods You Must Eat Organic

• Stone fruit
• Strawberries
• Rice
• Baby food
• Milk
• Bananas
• Green beans
What are consumers hearing?

10 Fruits and Vegetables to Buy Organic

- Peaches
- Pears
- Green Beans
- Apples
- Squash
- Strawberries
- Raspberries
- Spinach
- Potatoes
- Tomatoes

Thegoodhuman.com
What are consumers hearing?

The Dirty Dozen (AKA “The Toxic Twelve”)

- Peaches
- Apples
- Sweet Bell Peppers
- Celery
- Nectarines
- Strawberries
- Cherries
- Lettuce
- Grapes
- Pears
- Spinach
- Potatoes

Environmental Working Group
Consumers Union
What are consumers hearing?

18 Most Important Foods to Eat Organic

- Baby Food
- Strawberries
- Rice
- Bell Peppers
- Milk
- Corn
- Bananas
- Green Beans
- Peaches
- Apples
- Cherries
- Celery
- Apricots
- Grapes
- Soybeans
- Potatoes
- Raisins
- Cucumbers

Kidsorganic.com
What are consumers hearing?

Top 20 fruits & vegetables with detected pesticides

- Nectarines
- Peaches
- Celery
- Cherries
- Apples
- Strawberries
- Pears
- Grapes (imported)
- Oranges
- Carrots

- Sweet Bell Peppers
- Potatoes
- Cucumbers
- Cauliflower
- Spinach
- Tangerines
- Green Beans
- Grapefruit
- Grapes (domestic)
- Mushrooms

GroceryCouponGuide.com
What are consumers hearing?

Top 25 Fruits & Vegetables to Buy Organic

- Peaches
- Apples
- Sweet Bell Peppers
- Celery
- Nectarines
- Strawberries
- Cherries
- Lettuce
- Grapes - Imported
- Pears
- Spinach
- Potatoes
- Carrots
- Green Beans
- Hot Peppers
- Cucumbers
- Raspberries
- Plums
- Oranges
- Grapes-Domestic
- Cauliflower
- Tangerine
- Mushrooms
- Cantaloupe
- Lemon

FitnessSpotlight.com
What are consumers hearing?

Many people feel that pesticides in the food they eat may have played a role in their cancer. . .

Bottom line: The one time when it does not make sense to eat organic is when organic is not available.

Caring4cancer.com
SUS·TAIN·A·BLE

1. To keep in existence; maintain or nourish; provide for economically viable. 3. resolution of; encourage: socially desirable.
The World of Sustainability

Source: The Hartman Group 2007 Sustainability Survey (n=1,606).
Market Trends

“Sustainability will become the most significant social movement of our time. It will permeate every aspect of consumers’ lifestyles, business infrastructures and other societal constituencies. . .”

The Natural Marketing Institute (NMI)
Market Trends

The retail food industry typically averages only 2-4% annual growth.

The “natural products industry” has seen growth as high as 9-12%.

Sales of organic food/beverages have grown more than 20% annually over the last decade.
Market Trends

New product introductions in the top 5 product claim categories for 2005

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upscale</td>
<td>2,106</td>
<td>10.8%</td>
</tr>
<tr>
<td>Natural</td>
<td>1,612</td>
<td>8.2%</td>
</tr>
<tr>
<td>Single Serving</td>
<td>1,277</td>
<td>6.5</td>
</tr>
<tr>
<td>Fresh</td>
<td>692</td>
<td>3.5%</td>
</tr>
<tr>
<td>Organic</td>
<td>670</td>
<td>3.4%</td>
</tr>
</tbody>
</table>

Marketing Intelligence Service, Productscan Online, 2006.
Certification Programs

- Reduced Pesticides
- Ecosystem Friendly
- Animal Friendly
- Socially Responsible
- Sustainable
What Certification Provides

- Traceability  (What is the source?)
- Transparency  (What are the standards?)
- Accountability (Have the standards been met?)
Do You Sometimes Select Products Because They are Marked with a “Green Seal” or Other Eco-Friendly Label?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core</td>
<td>83%</td>
</tr>
<tr>
<td>Mid-level</td>
<td>53%</td>
</tr>
<tr>
<td>Periphery</td>
<td>18%</td>
</tr>
</tbody>
</table>

The Hartman Group
2007 World of Sustainability Survey (n=1,489)
The Organization Behind it Matters

Rating the trustworthiness of various eco-label sponsors:

75% said environmental groups are trustworthy

55% said government agencies are trustworthy.

51% said industry groups are trustworthy.

GfK Roper Public Affairs & Media and the Yale School of Forestry & Environmental Studies
March 28-30 (n=1,004) and April 4-6, 2008 (n=1,006)
Our Mission

Creating market incentives for socially and environmentally responsible agricultural practices
Food Alliance in a Snapshot

320 farms and ranches

5.6 million acres of range and farmland

22 food processing and distribution facilities

Over $100 million in sales of certified products in 2008
Food Alliance certifies farms and ranches that:

- Provide safe and fair working conditions
- Provide healthy, humane care for livestock
- Reduce pesticide use and toxicity
- Conserve soil and water resources
- Protect and enhance wildlife habitat
- Continually improve management practices
Prohibited Pesticides

Aldicarb
Phorate
Terbufos
Disulfoton
Methyl parathion
Oxamyl
Ethyl parathion

Carbofuran
Methyl bromide
Fenamiphos
Azinphos methyl
Methomyl
Ethoprop
Strychnine
Reducing Pesticide Usage

- Integrated Pest Management Planning
- Pesticide Selection, Justification and Resistance Management
- Weather Monitoring
- Equipment Calibration and Drift Management
- Crop Monitoring / Field Scouting
- Continuing Education for Reducing Pesticide Usage
- Lowest Effective Application Rates
- Pesticide Record Keeping
- Hazardous Material Storage
### Crop and Livestock Standards

<table>
<thead>
<tr>
<th>Crop Type</th>
<th>Crop Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple</td>
<td>Chestnuts</td>
</tr>
<tr>
<td>Asparagus</td>
<td>Cherry</td>
</tr>
<tr>
<td>Banana</td>
<td>Chives</td>
</tr>
<tr>
<td>Barley</td>
<td>Collards</td>
</tr>
<tr>
<td>Beans</td>
<td>Corn (field and sweet)</td>
</tr>
<tr>
<td>Beets</td>
<td>Cranberry</td>
</tr>
<tr>
<td>Chard</td>
<td>Cucumber</td>
</tr>
<tr>
<td>Citrus</td>
<td>Currant</td>
</tr>
<tr>
<td>Blueberry</td>
<td>Eggplant</td>
</tr>
<tr>
<td>Broccoli</td>
<td>Garlic</td>
</tr>
<tr>
<td>Brussels Sprouts</td>
<td>Gooseberry</td>
</tr>
<tr>
<td>Cabbage</td>
<td>Grape</td>
</tr>
<tr>
<td>Caneberries</td>
<td>Hazelnut</td>
</tr>
<tr>
<td>Carrot</td>
<td>Herbs</td>
</tr>
<tr>
<td>Cauliflower</td>
<td>Horseradish</td>
</tr>
</tbody>
</table>
| Beef, Bison, Dairy, Lamb & Goats, Pork, Poultry
| Kale               | Leek               |
| Leek               | Lettuce            |
| Lettuce            | Mushrooms          |
| Melons             | Mustard            |
| Mustard            | Onion              |
| Onion              | Parsnip            |
| Parsnip            | Pea                |
| Pea                | Peach              |
| Peach              | Pear               |
| Pear               | Peppers            |
| Peppers            | Potato             |
| Potato             | Radish             |
| Radish             | Rapeseed           |
| Rapeseed           | Rhubarb            |
| Rhubarb            | Rutabaga           |
| Rutabaga           | Scallion           |
| Scallion           | Spinach            |
| Spinach            | Squashes           |
| Squashes           | Strawberry         |
| Strawberry         | Sweet Potato       |
| Sweet Potato       | Tomato             |
| Tomato             | Turnip             |
| Turnip             | Vine crops         |
| Vine crops         | Wheat              |
| Wheat              |
Food Alliance certifies processors & distributors that

- Use Food Alliance Certified™ ingredients
- Provide a safe & fair work environment
- Conserve water and energy resources
- Reduce waste through reuse & recycling
- Ensure nutritional value
- Ensure quality control & food safety
- Continually improve management practices
Meet customer product specifications
Manage regulatory risks
Demonstrate company values
Improve community relations
Protect and enhance brands
Differentiate and add value to products
Increase customer loyalty
Gain access to new markets
Gain access to contracts
Increase sales
Improve pricing
Corporate Social Responsibility

More than half of 100 M.B.A. programs surveyed worldwide by require courses in corporate social responsibility.

In 2005, 32 of the top 100 companies in the US published a corporate social responsibility report.

All of the top 5 food manufacturers, foodservice companies, and grocery retailers do some CSR reporting.

KPMG Global Sustainability Services, 2005
Aspen Institute and World Resources Institute
Martinez, Steve W. The U.S. Food Marketing System: Recent Developments, 1997-2006
Our Dream
Our Dream is to be the premier onsite restaurant company known for its culinary expertise and commitment to socially responsible practices...
Certified sustainable and organic
Certified sustainable
Local
Certified organic
Integrated Pest Management
Industrial
“Kaiser Permanente aspires to contribute to the creation of healthy food systems reflecting practices that are ecologically sound, economically viable, culturally appropriate and socially responsible.”

-- Adopted by KP Environmental Stewardship Council, Nov. 2004
By 2010 we will maintain ethical sourcing standards and develop sustainable agriculture programs by:

- Working to ensure our suppliers meet our ethical sourcing standards
- Sustainably sourcing at least half of our key agricultural materials for core brands

What Good Looks Like:

- Training and Personal Protective equipment provided.
- Integrated Pest Management approaches fully evident and implemented.
- No recorded incidents of damage to health from pesticide or fertilizer use.
- No significant trace of pesticide within crop.
The goal of this program is the use of environmentally friendly pesticides, only as necessary.

This is a large initiative for our company that involves 70 suppliers, 160 food factories, and approximately 375,000 acres of crop land the first year of implementation.

Due to IPM practices in the field, our suppliers have reported avoiding the use of pesticides of over 300,000 lbs. of active ingredient pesticides this last year.
At Wal-Mart, we know that being an efficient and profitable business and being a good steward of the environment are goals that can work together.

Our environmental goals at Wal-Mart are simple and straightforward: To be supplied 100 percent by renewable energy; to create zero waste; and to sell products that sustain our resources and the environment.
In Closing

More third-party certification and ecolabeling programs

More corporate guidelines and auditing programs

The increasing importance of “beyond organic” solutions

More and better information available to guide decision making

Increasing focus on relative toxicity and specific problem ingredients