

**SUSTAINABLE RETAILING: AN EXPLORATORY ANALYSIS  
OF SUPERMARKETS IN TURKEY**

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**ABSTRACT**

Sustainable consumption and production patterns offer better quality of life through minimizing the use of natural resources so as to not jeopardize future generations' needs. Retailers, especially supermarkets/hypermarkets, can play a crucial role in maintaining sustainability through influencing consumption and production patterns. However, literature review related to sustainability remains fairly unexplored in the retail research in Turkey. Thus, the aim of this paper is to provide an exploratory review of the publicly reported most recent sustainability reports, official web sites, and Facebook accounts of BİM, MİGROS, METRO and CARREFOURSA, largest retailers in Turkey, and offer an understanding of the applications these retailers are currently implementing as part of their sustainability agendas. Further, the analyses of the written material are supplemented by actual observation visits to the retail stores, to identify sustainability applications carried out by the retailers in their store environment. The analysis revealed some important findings: The review suggests that all the retailers are addressing sustainability agendas. However, the Internet search related to sustainability applications of the retailers put forth considerable variation in the volume and detail of information, and sustainability commitment is rather limited and more tactical for most of the retailers analyzed.

**Keywords:** *Sustainability, Retailing, Turkey*

**SÜRDÜRÜLEBİLİR PERAKENDECİLİK: TÜRKİYE'DEKİ  
SÜPERMARKETLERİN KEŞİFSEL BİR ANALİZİ**

**ÖZ**

Sürdürülebilir gelişme; sürdürülebilir tüketim ve doğal kaynakların kullanımını gelecek kuşakların ihtiyaçlarını tehlikeye atmayacak şekilde minimize edecek üretim süreçlerine bağlıdır ve perakenciler, özellikle de süpermarket/hipermarketler sürdürülebilirliğin sağlanmasında önemli bir role sahiptir. Bununla beraber Türkiye'deki perakendecilik araştırmalarında bu konunun oldukça az incelendiği görülmektedir. Bu nedenle bu çalışmanın amacı, Türkiye'nin en büyük perakencileri olan BİM, MİGROS, METRO ve CARREFOURSA'nın en son yayınlanmış sürdürülebilirlik raporlarını, resmî internet ve Facebook sayfalarını inceleyerek bu perakencilerin sürdürülebilirlik ajandaları ve bu doğrultudaki uygulamalarını tespit etmektir. Buna ek olarak

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perakendecilerin mağazaları gözlemlenerek sürdürülebilirlik konusunda yaptıkları uygulamalar incelenmiştir. Bu analiz bazı önemli sonuçları ortaya çıkarmıştır: Bütün incelenen perakendecilerin sürdürülebilirlik ajandaları vardır. Bununla beraber sürdürülebilirlik açısından yapılan internet incelemesi hacim ve bilgi çeşitliliği ve sürdürülebilirlik konusunda gerçekleştirilen uygulamalar açısından değişiklikler göstermektedir ve sürdürülebilirlik konusunda analiz edilen çoğu perakendecinin sorumluluk almak açısından kısıtlı ve sadece taktiksel uygulamalar gerçekleştirdiği görülmüştür.

**Anahtar Sözcükler:** *Sürdürülebilirlik, Perakendecilik, Türkiye*

### **INTRODUCTION**

Sustainable development has been defined as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs", (World Commission Environment and Development Report, 1987). From a broader perspective, sustainability accounts for the combination of "economic, social and environmental dimensions" (Claro et al., 2013). Sustainable development is directly related to sustainable consumption, and production that satisfies needs and at the same time minimizes the use of natural resources. As well as all the parties included in the production and consumption process; governments, non-governmental organizations, and retailers hold an important position in maintaining sustainable development. Retailers have an important responsibility in sustainability due to their role between supply and demand. "Retailing is a diverse and dynamic industry offering a wide range of goods and services to consumers. There is also an increasing recognition that this corporate retail power is the driving force for the whole supply chain. Due to these facts, it is argued that retailing companies have a huge potential to impact sustainability performance of national economies". With these privileged position retailers can both influence production and consumption (Delai and Takahaski, 2013) by remodeling supply chains, and influencing consumption (Chkanikova and Lehner, 2015). "Retailers act as gatekeepers between producers and consumers" (Ytterhus et al., 1999), and they could be held responsible for activities in their supply chains (Wiese and Toporowski, 2013) together with minimization of unsustainable retail operations. Thus, it could be said that retailers have various means of influencing social and environmental sustainability.

The earliest adopters of sustainable business practices in retailing have been in the grocery sector since they consume large amounts of

energy, are large space users, and there are many possibilities to develop “green” products (Evans and Denney, 2009). As well as implementing sustainability programs, many large retailers are also willing to publicly report their sustainability agendas, commitments and achievements. Many large retailers have been determined to demonstrate their interest in the wellbeing of the environment, their employees and the communities they serve, to promote the transparency of their operations, to better manage risk, to enhance brand value and to grow their market share (Jones et al., 2011).

Though retailers have an important role in sustainability, research related to the topic is still at its infancy (Delai and Takahaski, 2013; Wiese et al., 2012). Thus, the aim of this research is to understand retailers’ viewpoint of sustainability through the analyses of their published most recent annual reports and/or sustainability reports available in web; what they communicate about sustainability through the analyses of their social media accounts, and observation of the physical retail stores. The paper is structured as follows: First, literature about grocery retailing in Turkey and retailing and sustainability is provided which is followed by the findings and discussions.

### **GROCERY RETAILING IN TURKEY**

Retailers’ role is to respond to consumer demand and offer an assortment of products that would satisfy this demand. They are the link between manufacturers and consumers. Though, some researchers “characterize retailers’ position regarding sustainability as being largely passive, others view the retailers as having a much more active role in driving production and in stimulating customer demand” (Durieu, 2003; Jones et al., 2005). They can greatly influence changes in production processes and consumption patterns and are well placed to exert pressure on producers in favor of more sustainable consumer choice (Durieu, 2003). Especially large retailers have the capability to control supply chains to a larger degree (Hingley, 2005). There is a growing awareness of the role that retailers, more particularly food retailers can play in promoting sustainable consumption (Jones et al., 2011). In fact, increasing consumer awareness, pressure from government, and other stakeholders, increasing regulations and developments in information and communication technologies is forcing retailers to reconsider and take some actions regarding their environmental, and social impact as well as economic impact. Another reason for increased responsibility of retailers is that, they might be held responsible for the activities of their supply

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chains by consumers and non-governmental organizations leading to a loss of reputation (Wiese et al., 2015). Thus, sustainability issues are becoming more important for today's retailers.

Sustainable development has three main dimensions: social, environmental and economic. The triple bottom line concept addresses sustainability as the equilibrium among environmental protection (planet), economic return (profit) and social development (people). "Society, economy and environment are inseparably connected. They are three interdependent spheres where the largest is the environment that provides ecosystem services and natural resources, the middle is society and the smallest is the economy" (Baxter et al., 2009 as cited in; Delai and Takahaski, 2013). The "environmental dimension encompasses the ecosystem wellbeing, which is a condition in which the ecosystem maintains diversity and quality, its capacity to support all life, and its potential to adapt to change to provide future options" (Prescott-Allen, 2001: 7). In general terms the majority of companies are implementing a broadly similar range of environmental programs mainly involving energy efficiency, water consumption, carbon dioxide emissions, vehicle emissions, reductions in the volume and constituents of packaging, waste management and recycling (Jones et al., 2005). The social dimension engages in human wellbeing, meeting of human needs and to increase the opportunities of development equally for everybody. In other words, it is about equity and quality of life. Social issues, like, social inclusion, ethical trading, healthy living, training, health and safety, community support initiatives fall under a broadly sustainable agenda. Finally, the economic dimension concentrates on the creation of wealth. The concept of economic sustainability is a much more variable issue within the retail community. Some large retailers do not explicitly communicate it in their corporate social responsibility reports, some see it as a means of securing lasting and profitable growth while others evaluate it as embracing broader concerns such as economic improvement and support for local economies. Uydacı (2011: 105) states that in fact a small number of businesses implements sustainability as a strategic approach, rather they implement some fragmented sustainability projects. However, maintaining sustainability needs a much comprehensive and long term inclusion and integration into company strategies. Also retailers must comply with many national and international regulations and standards for most part of their operations. However, sustainability is not about just obeying the standards but it is going over them.

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Nevertheless, major retail companies have been addressing sustainable agendas in a variety of different ways (Jones et al., 2005). Sustainability research in retailing can be structured based on the type of sustainability activities undertaken. Retailers can address sustainability issues by offering more sustainable products, implementing more sustainable business processes and motivating customers to behave more sustainably. In the United Nations Environment Programme (UNEP, 2015) report it is stated that retail sector can contribute to sustainability by: Cleaner Production and Environmental Management Systems by controlling and managing their environmental and social impacts through implementing environmental management systems for energy/water conservation, waste management, logistics, recycling programs, or likewise; through the supply chain management by co-operating with suppliers, supporting the development of products with better environmental and/or social attributes. Also, efforts such as greening the supply chain and implementing green purchasing can encourage suppliers to develop eco-friendly products, and to provide information on the sustainability aspects of their products through ecolabels; and finally by education and information of customers, retailers can encourage consumers to purchase eco-friendly products as well as providing advice on the usage and disposal of the products and offer facilities and services such as take-back systems for batteries, reusable bags, etc.

These activities can further be structured regarding the sustainability issues addressed, in particular whether they address environmental or social issues. Further they could also be divided as tactical or strategic responses (Thompson, 2007). For example, Thompson (2007) considers short term and quick modifications that could impact the environmental effect of retailers as tactical responses. Upgrading energy devices and using LEDs and low energy bulbs for lighting, as well as replacing equipment like computers, cooling and heating systems with less power consuming versions. Also by choosing to purchase green power instead of conventional electricity, retailers can support the development of new, cleaner technologies that will reduce the environmental impacts associated with conventional electricity generation.

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### **STUDIES REGARDING SUSTAINABLE RETAILING IN TURKEY**

Though sustainability is a widely studied topic in Turkish literature; literature regarding sustainability in retailing is an under investigated topic. To the extent of authors knowledge there are few studies regarding retailing and sustainability in Turkey. Erol et al. (2009), in their comprehensive study, have attempted to select the most suitable indicators for future evaluation of industrial sustainability performance for grocery retailing in terms of three sustainability (environmental, social and economic) dimensions. Most appropriate indicators for environmental sustainability were found to be 'water consumption', 'energy consumption', 'category selection and management' and 'product and packaging recovery'; examples of the most suitable indicators for social sustainability were 'customer complaints', 'occupational health and safety', 'NGO-retailer partnerships', 'consumer health and safety', 'private brands', 'training and career' and 'personnel turnover and layoffs'; and some of the most suitable indicators for economical sustainability were 'innovational capabilities and R&D expenditures', 'total payment made to employees', 'number of shareholders', 'total payments per share' and 'total tax paid'. Gök and Türk (2011) analyzed retail managers' environmental consciousness. Özbakır and Velioğlu (2010) analyzed sustainable marketing transformation of, Marks & Spencer which might be considered as one of the first retailers that has attempted sustainable marketing transformation process in Turkey. The limited number of studies regarding this topic in Turkish marketing literature highlights the importance of current study.

### **METHODOLOGY**

This paper is an initial qualitative exploratory study focusing on retail sustainability practices which are relatively new in the Turkish literature. The aim of this study is to understand to what extent retailers contribute to sustainability and what their business practices for this purpose are. In order to achieve the study's objectives, a qualitative content analysis of the sustainability practices of the biggest four retailers (BİM, Migros, Metro, CarrefourSA) was employed. These four retail chains were selected from a list of Turkey's largest 100retailers depending on their 2014 balance sheets ([www.retailer.net](http://www.retailer.net)). Also another reason for including those retailers to analyses were; since they are the

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industry leaders, they were expected to show more responsibility for sustainable development and reporting.

To undertake this research an internet search for the stated retailers web sites, most recent annual reports and/or sustainability reports available on web, and Facebook pages was actualized to reach information regarding sustainability activities of the four retailers. Facebook pages of the retailers were analyzed for posts published between September 1 and October 5, 2016. Information revealed through this search provided the empirical information of this paper. Also actual observation visits to the researched retail stores to identify the in-store sustainability applications, and communications were carried out. Qualitative content analysis technique was chosen as it is a frequently applied method in studying sustainability reports (Delai and Tasakhi, 2013). The content analysis was applied as follows. First of all, the aim of the analysis was defined and accordingly the categories that would be employed to classify the data collected were identified. The aim as stated previously was to identify sustainability practices related to social, environmental and economical dimensions reported by the selected retailers. Based on that, three sets of categories were defined (environmental, social and economic). Themes and sub-themes under the main categories were driven from the related literature, and coding was done by using the pre-listed subthemes (Table 1). As the analyses progressed, if new codes emerged they were than included to the list of existing themes.

## **RESULTS AND DISCUSSIONS**

The findings retrieved from the analyses of most recent annual reports, web pages, Facebook pages, and stores of the retailers examined are summarized in Table 1. All the retailers offered information regarding their commitment to sustainability or at least corporate social responsibility, however there were huge variations in the formats and contents of the reports. Migros offers sustainability reporting as part of the annual report as well as on its corporate web site. In this report, Migros discloses the main economic, ecological and social contributions in light of the principles of the Global Reporting Initiative GRI. Sustainability is a priority for Migros as could be understood from the report, and handling of its sustainability management approach at the board level, managed through the Sustainability Committee. Migros Sustainability Committee composes of leaders of different units of the company that assesses legal, physical, environmental, operational, socio-

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economic risk, and opportunities with regard to sustainability. The issue of sustainability is positioned as the mutual responsibility of all employees within the company. Also the retailer has a Facebook page which is used to make promotions as well as giving tips and recipes to consumers on how and when to use products, however no specific information regarding creating awareness on people for sustainability was found within the posts published in the Facebook page during the analyzed period.

BİM is a domestic retailer operating in the high discount food retailing sector and recently in 2015 entered the supermarket segment with its "FİLE" branded supermarkets. BİM provides information about its sustainability activities in the annual report however does not offer any information regarding the environmental and social sustainability activities in its corporate web site. The retailer has a Facebook page where frequently asked questions and customer questions are answered and recent products offered in the retailer is introduced, however no information regarding sustainability is provided between September 1 and October 5, 2016 period. 2015 annual report of BİM is 112 pages and most part of the report is dedicated to the economic impact of the retailer and there is no section or heading under the report specific to sustainability.

CarrefourSA provides information about its corporate social responsibility activities in its corporate web site and offers information on its sustainability activities as part of its annual report. The most recent annual report of the company available to internet search is for the year 2014. In its Facebook page the retailer other than informing customers about its promotions and giving tips on how to use products, aims to create awareness about the importance of selecting non-toxic stationary products and negative influence of unhealthy stationary products, which is also in coordination with its TV advertisements and also informs customers about a cause related marketing campaign they are undertaking. Carrefour is a French based retailer first opened in 1963 in France. Today it operates in 30 countries worldwide and it is the number one retailer in Europe and second in the world according to company provided information. Carrefour has opened its first store in Turkey in 1993 introducing the country with modern retailing.

**Table 1: Scope of the Retailers' Reported Sustainability Practices**

	Themes	Sub-Theme	M	B	ME	CS
<b>Environmental</b>	Climate change	Carbon emissions; carbon footprint	*		*	*
	Energy consumption	Logistics	*			
		Energy consuming equipment within stores	*		*	*
		Alternative energy sources	*		*	*
		Energy consumption	*		*	*
	Water management	Water usage	*		*	*
	Waste management	Environmental friendly bags	*	*	*	*
		Recycling	*	*		*
		Recycling boxes within store	*	*	*	*
		Reduction of waste	*		*	*
Substitution of hazardous material		*			*	
Products	Environmentally friendly products	*				
	Green, organic	*				
	Quality control of the production facilities of suppliers	*				
	Product/food quality	*		*	*	
	Good agriculture practices/ sustainable agricultural practices	*		*	*	
	Good poultry/meat	*		*		
	Sustainable fishery	*		*		
	Local products	*		*		
Biodiversity	Conserving natural resources	*				
	Eco systems Protected areas					
<b>Social</b>	The relationship with employees	Education, training and development	*		*	*
		Diversity and equal opportunities	*			
		Health and safety	*			
		Human rights	*			
	The relationship with suppliers	Motivating/ educating suppliers to be more sustainable	*			*
		Working conditions at suppliers	*		*	
		Responsible sourcing	*			
		Fair trade	*			
The relationship with customer	Customer health and safety	*	*	*	*	
	Motivating/educating customers to behave more sustainably	*	*	*	*	
	Customer complaints	*	*	*	*	
	Customer satisfaction	*	*	*	*	
The Relationship with Publics	Charitable giving	*		*	*	
	Corporate social responsibility NGO partnerships	*		*	*	
<b>Economic</b>	Employment creation		*	*	*	
	Value for customers		*	*	*	
	Supplier relationships		*	*		
	Building shareholder value		*	*	*	
	Competitive advantage		*	*		
	Innovational capabilities		*	*	*	

Source: (Jones et al., 2011; Delai and Takahaski, 2011, 2013; Wiese et al., 2012; Marques et al., 2010; Jones et al., 2013; Erol et al., 2009; Findings of the Author) (M: Migros, B: BİM, ME: METRO, CS: CarrefourSA)

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In 1996 Carrefour has formed a partnership with Sabancı Holding Company acquiring the name of CarrefourSA. The retailer has strengthened its position in the market with further acquisitions. Today the retailer operates with different concepts like hyper, super, gourmet, mini market concepts and e-retailing to reach different market segments

Metro is a German origin cash and carry/ wholesaler and retailer. It is among the largest retailers in the world and has been operating in the Turkish market for 25 years for the year 2015. The retailer has published its first sustainability report in 2015 and the report has been prepared in accordance with, the Global Reporting Initiative (GRI) G4 Standards. Also the retailer offers information about its sustainability initiatives on its corporate web page, and Facebook page. In fact, the company could be considered as the most effective company in usage of Facebook for trying to create awareness in its customers and educate them about food safety and offer online educations.

### **Economic Dimension**

All the retailers analyzed are powerful in their segments and market leaders or leaders of their segment, thus it is expected that they have positive economic impact both for themselves and domestic economy. Economic dimensions compose of different themes as employment creation, value for customers, supplier relationships, building shareholder value, competitive advantage and innovational capabilities. As could be seen from the Table 1, three retailers provide a good amount of information regarding their economic impact, which is a very important part of corporate sustainability, since it is not possible to create good environmental or social impact without economic growth.

It is stated that according to the report of "Global Powers of Retailing" 2016 BİM is the 153<sup>th</sup> largest retailer among the largest 250 retailers in the world and it is also in the 21<sup>th</sup> rank among the fastest growing retailers. The retailer operates with its 4,972 stores, and the company has stated a growth of 76% in sales in the last three years. The sales growth for the year 2015 was 21%, and sales revenue was stated to be 17.4 (billion). Net profit for the year 2015 has been stated as 583.1 million with a 48% increase. Those values give a good idea about the competitive advantage of the company. The company owes this success to value it offers to its customers with everyday low price strategy. The company accomplishes this with their narrower range of products (600) and simple designed stores located in low rent streets and employing just

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enough number of employees within the stores and cutting from promotional and unnecessary costs. With this strategy the retailer has gained competitive advantage and has been selected the 3<sup>rd</sup> company that has been providing most employment for the last two years. In addition to employment creation, the retailer has been distributing high rates of dividends to its shareholders, despite the high investments. The stock price of the corporation has increased by 2.217% since July 2005 and outperformed the BIST-30 index return.

Migros, a 61 years old retailer, also maintains a leading position in the Turkish market. As of year-end 2015, the Company's portfolio held a total of 1.410 stores consisting of 457 M, 255 MM, 94 MMM, 464 Migros Jet, 23 5M, 22 Tansaş and 36 Macrocenter stores in Turkey and 47 Ramstores (27 in Kazakhstan and 20 in Macedonia) abroad. As of end-2015, the company had operations in 71 of Turkey's provinces. In 2015, 249 new stores in Turkey and 8 new stores abroad were opened. The retailer has increased its revenue by 16% to 9.4 billion TL in 2015, and registered consolidated sales growth of 15.6%. The company's sales amounted to 9,390 million TL and aims to open between 150 and 200 stores with double digit consolidated sales growth in 2016. Despite, the fact that the retailer generated a significant operating profit from its operations in 2015; it reported a net loss of 370 million TL due to losses related to adverse movement of the exchange rate and non-recurring expenses. The source of the company's strong growth is due to both newly opened stores and increased performance in existing stores. Besides, one of the most important factors that contribute to the company's growth has been the operational efficiency increase. Some of the more than 250 stores newly opened in 2015 were opened with the resources generated by efficiency. Those newly opened stores also contributed the retailer's mission of employment creation with 4,500 new employees. The company targets to add additional 5,500 employees to its existing 21,762 personnel in 2016 by adding new stores to its current ones.

CarrefourSA, a leading retailer in the world, has been operating with its 27 hypermarkets, 176 supermarkets, 22 Gourmet retailers and 108 mini markets in the Turkish market in 40 cities for the end of the year 2014 reaching to a 373 thousand square meters of sales area. The retailer with its 8.000 employees approximately has served to 100 million customers. Total sales of the company have been 3.1 billion for the year 2014. No information regarding economic values of Metro was reached in the web search.

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Finally, three of the retailers offer successful private labels, which might indicate their innovational capacities. Especially BİM is in a pioneering position regarding private labels with private label sales reaching 70% of its total shares in 2015 which is much above the ratio in Turkey. CarrefourSA also offers more than 2500 private branded products.

**Table 2: Summary of the Main Economic Indicators**

	BİM*	MİGROS*	METRO	CAREFOURSA**
Number of stores	4,972	1,410	NA	333
The sales growth	21%	15.6%	NA	20%
Sales revenue (billion)	17.4	9.4	NA	3.1
Net profit (million)	583.1	-350	NA	100.5
Number of employees	30,232	21,762	NA	8,000

\*The results are relevant for the year 2015;

\*\* The results are relevant for the year 2014

(NA: Not Available)

### Environmental Dimension

Environmental dimension is composed of themes as climate change; energy consumption; water management; waste management; products and biodiversity. Retailers themselves may not be included in the production process however they might have tremendous negative or positive impact on the environment either directly; like from gas emissions of refrigeration or wastes produced; or indirectly by the selection of the suppliers, and products that they prefer to sell to their customers. The way retailers manage the disposal of hazardous packaging like plastic bags or packaging or excessive packaging is very important for retailing sector. It is well known that plastic bags lead to many adverse environmental impacts, including production energy costs, limited lifespan, increasing landfill content and inability to biodegrade, as well as providing a symbolic and practical evidence of a 'throwaway' consumer culture which acts as a significant barrier to sustainable consumption in particular and sustainable development in general. Discouraging consumers from plastic bag usage is therefore an important challenge in the pursuit of sustainable consumption as a precursor to achieving sustainable development (Ritch et al., 2009).

All the retailers analyzed are seen to take some action regarding the waste management problem. BİM sends its plastic and cardboard

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packaging waste to licensed firms engaged in the activities of the recycling of packaging waste. Also in its retail stores the company uses biodegradable bags and has recycling boxes. Metro encourages its customers to minimize bag usage as well as using biodegradable shopping bags and charging a small amount of money from the plastic bags in order to minimize its consumption. Migros sends organic waste from food products whose shelf life expired to the biogas plant. Also the company manages the electronic waste it produces. In 2015, 115 tons electric and electronic equipment waste generated by the customers and Migros was undertaken to an e-waste recycling practice saving 1,076.5 tons of CO<sub>2</sub> emissions. Further, 1.24 tons of batteries were collected through the battery waste collection boxes placed in stores. 8.3 million batteries were recycled through Migros' recycling collection kiosks. Also with "waste oil connection bins" waste vegetable oil collected through environmentally sensitive customers were sent to licensed firms. Other than the recycling activities the company undertook some reduction activities and included the reduction of food loss and waste into its strategies. For the reduction of secondary packaging, foldable and reusable plastic casing was beginning to be used for fruit, vegetable and red meat and plastic and cardboard use was reduced, and to reduce the use of printed materials, measures regarding paper dimensions and design were introduced. In 2011, Migros structured its integrated waste management system based on a "zero" waste target by collaborating with Boğaziçi University. The objective of this system was to separate waste at their sources and to dispose them through the most suitable methods, and contribute to the economy. CarrefourSA also has attempts for one of its stores located in a shopping mall to implement an integrated waste management system. The retailer is a member of Environmental Protection and Packaging Waste Recovery and Recycling Foundation (ÇEVKO) and is pioneering the sector in recovery and recycling of packaging waste. The retailer uses biodegradable bags and has recycling boxes within its stores for the customers as stated in its web page. However, in the actual store visits the recycling boxes in the two stores visited were not available. Also the retailers aim to educate and motivate customers for the usage of reusable bags. In order to motivate customers, the retailer offers to change the damaged reusable bags of customers for free.

BİM does not provide any information about what they do to protect the environment regarding other themes under the environmental dimension. Metro gives importance to usage of alternative energy

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sources like solar energy applications and aims the reduction of natural resources, and minimize the negative environmental impacts resulting from production of water waste and sets targets for the usage of energy and CO<sub>2</sub> emissions. Metro prefers the usage of FSC-certified papers. CarrefourSA in accordance with its sustainable development policy aims to increase energy efficiency through changing equipment with more energy efficient systems. In its environmentally friendly retail stores they made attempts to produce electricity by themselves by using environmentally sensitive photovoltaic cells that would result with monetary savings at the same time. Also the company works for minimizing CO<sub>2</sub> emissions.

Migros also undertakes a comprehensive and strategic approach in the protection of the environment. As Thompson (2007) suggests, retailers can apply some strategic options to address the fundamentals of the retailing process through shaping consumer behavior like using online sales and electric power fleets. Migros offers an alternative distribution channel with its virtual market and electric cars have also been added to the distribution fleet with the aim of enhancing energy efficiency. At the same time, electric bicycles are also used for service in mass housing zones and seasonal stores. The effects retailers might have on climate change are also important. Migros calculates its greenhouse gas emissions every year and aims to reduce emissions compared to the previous period Migros aims to reduce its carbon emission per square meter by 20% by 2025, when compared to its 2015 levels. Climatization and refrigeration systems are the most significant source of energy use and emissions in stores. Thus for controlling energy use in these processes, refrigeration automation system was launched in more than 1,100 stores and launched a trial process for a transition to using natural coolers. Also Migros carries out activities to conserve water in all operations to protect natural resources. The company's working principles include preventing the environmental impact of waste water resulting from its operations and executing its legal duties.

As for the products, Migros holds the Organic Entrepreneur Certificate and Good Agricultural Practices (GAP) group certificates and prefers to procure its products from suppliers who adopt GAP in support of ecologic biodiversity as an agricultural product retailer. The company has also included practices developed for poultry and beef and lamb products into its "Good Life" standards. These practices, that target freshness, are important for consumers. Metro also states that they put

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a lot of emphasis on quality and implement detailed quality analyses. Also the company analyses all the non-food products that are used with food product and all the children products that they sell for any carcinogenic substances. The company by supporting fishery and local seeds supports the sustainability of local economy and biodiversity and helps the protection of more than 60 products that are in danger of being lost. CarrefourSA, also puts forth quality management and product safety as a priority. The products are controlled throughout all the steps of the supply chain and the retailer according to food safety standards. The controls are implemented by independent laboratories. Also the retail stores are inspected once a month to ensure market hygiene and food safety. As part of a project regarding stationary equipment, those products are analyzed for the existence of toxic heavy materials, azo dyes and similar materials that are not good for the human health and just the products that comply with the standards are provided to the customers.

In order to protect biodiversity Migros forms collaborations with suppliers to manage the impacts across the value chain and executing various projects and campaigns to increase public awareness. In 2015, Migros planted 17,200 saplings in conjunction with the Aegean Forest Foundation and a total of 529,450 saplings had been planted at the end of 8 years. At the same time, Migros attaches importance to the certificates that prove that palm and soy oils used in some of suppliers' products do not cause deforestation. Finally, Migros is the only retailer among the analyzed retailers that actually owns a fully environmentally friendly retail store. Bodrum Maya Migros store, which was designed to be fully environmentally friendly, was the first store in the Turkish retail sector to be granted the LEED GOLD certificate. This project fulfilled the requirements of green retail, achieving sustainability of energy and natural resources. The Bodrum Maya Migros store, which is a pioneering project in the retail sector, received awards in the Environment and Sustainability category by Soysal Retail Sun in 2013. This was followed by the İzmir Alaçatı Macrocenter store, which obtained the LEED Gold certification in Operation and Maintenance category.

### **Social Dimension**

Social dimension of sustainability applications is related to the relationship of the retailer with its stakeholders. The results of the relationships with stakeholders might create some economic, environmental or social impacts. This dimension composes of themes like

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relationship with employees, relationship with suppliers, relationship with customer and relationship with publics.

### **Relationship with Employees**

Relationship with employees especially in the service sector is very important, as employees are the internal customers that play a very important role in the satisfaction of the final customers, hence the sustainability of the retailer. All the retailers are concerned with their relationship with the employees. In fact, food retailing sector is usually known to be as a sector where the employee turnover rates are high. However, two of the retailers especially BİM states that due to their growth models giving priorities to within company promotion, levels of customer turnover are lower and employee loyalty is higher compared to industry standards. BİM annual report does not offer further evidence regarding the relationship with its employees; on the other hand MİGROS states that its human resources policy is rooted in the philosophy of "Creating employees who will create competitive advantages". In this respect they offer "Store Career Paths Program", which allows employees to manage their own career systematically. In line with the Store Career Paths Program that was revised in 2015 no fewer than 98% of Migros' store management personnel were recruited from the Company's own human resources. Migros Retailing Academy (MRA), contributes to development of employees and to raising qualified labor. MRA is structured so as to create an environment which makes continuous development a component of Migros' corporate culture. Also the retailer has collaborations with different universities giving high school or university students retailing education. "Migros employees were provided with an average of 19 days of training in 2015". In addition to trainings given related to retailing, sustainability training is also offered to the employees of the retailer. Migros employees can access training at any time and from any location from the [www.akademig.com](http://www.akademig.com) website, which is Migros' e-learning platform. Migros employees may follow current affairs regarding sustainability from the sustainability page that has been added to Migros' Corporate Communication magazine "Turuncu". Carrefoursa follows similar education and training programs. The company, in addition to in the company training, has collaboration with Sabancı University and e-learning platforms are available for training purposes of employees. The yearly training and education given to the employees have been over 30 hours for the year 2014. Metro also implements some education and training programs for employees. The

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training programs like "Fresh Food Academy" and "Butcher School" helps employees to do their jobs better and "METRO Potentials International Management Trainee Program" and "Crossing Borders Program" to give young management trainees international opportunities.

Employee health and safety is another important issue that would influence sustainability of any company. However, of the four retailers just one of them provides extra information about this issue. MİGROS in its annual report states that "they engage in an ongoing effort to promote a safety culture shared by both employees and customers and contribute towards making safe behavior a habit throughout society". For this purpose, since 2013 the company has an Occupational Health & Safety Committee, and hold a TS 18001 OHSAS Occupational Health and Safety Management System certificate. With the "Good Future" motto, Migros aims to enhance the health and wellbeing of its employees and customers by, encouraging employees to take conscious choices and become more physically active, supporting general physical and mental health. Migros adheres to universal human rights in line with the United Nations Guiding Principles on Business Life and Human Rights and the ILO Declaration on Fundamental Principles and Rights at Work since 1972.

### **Relationship with Customers**

No company can survive without customers. Maintaining good relationship with customers and creating satisfaction is vital for the sustainability of retailers. The importance the retailers give to their customers can be understood from their annual reports. First of all, for all of the retailer's customer satisfaction is a priority and the retailers creates value for their target markets to maintain customer satisfaction. BİM's approach to customer satisfaction and creation of value is everyday low prices and good quality product, while Migros applies a customer relationship program and offers a higher quality service. By the help of this CRM program customers are provided with personal recommendations based on their past shopping habits, and they have a very successful loyalty program. The success of Migros' CRM activities has also been approved by the reward it has been given. The retailer has been selected "The Most Admired Company of Retail Sector" for a 12<sup>th</sup> time in the survey of "Turkey's Most Admired Companies" in 2015 and, also was chosen as a "Lovemark" for an 8<sup>th</sup> time in the "Supermarket" category in the survey of "Turkey's Lovemarks. The retailer manages customer complaints through its customer call centers and complaints or

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suggestions are listed in accordance with priority and responded to within 48 hours at the latest. "Migros operations have been awarded TSE ISO 10002 Customer Satisfaction Management System Certification". Results of all communications received and responded to, through all communication channels, are reported with the aim of continuous improvement. Also within the scope of "Removing Obstacles in Shopping" program, 251 wheelchairs were distributed in 223 stores in 2015 in order to make shopping easier for disabled people, and "Let Us Carry for You" project is intended for people aged 65 or older, where store personnel accompany elderly shoppers and carry their purchases as they return home. Metro, at the same time being a wholesaler has been applying a "Grocery project" since 1988 offering solutions in order to contribute to the commercial success of the grocery stores which might be considered as a step to customer satisfaction. However, the company does not provide information on how they manage customer complaints. CarrefourSA in order to keep customer satisfaction at highest level keeps tracks of customer complaints and suggestions by means of its call center, web page or social media channels record them and answers them as soon as possible. Approximately 95% of incoming calls are reached to a solution between 8 and 24 hours. The retailer has been awarded by an internet portal (sikayetvar.com) as the company that best manages the customer complaints for 4 times.

For all the retailers' food safety and quality is a priority. Maintaining food safety via making continuous improvements has been adopted as company policy of BİM. For inspecting the quality of its product portfolio, the retailer works in coordination with quality systems laboratories, Eurolab and the TÜBİTAK Research Institute. TÜBİTAK conducts chemical and biological testing on products sold in BİM and production facilities are also under stringent quality control. Also BİM implements an unconditional return policy. A customer could return a purchased product without specifying the reasons and without any time constraints.

Migros for maintaining its brand image puts a lot of emphasis on food safety and quality. Undertaking significant investments in the field of freshness, for good quality meat and poultry products as well as good agricultural practices (GAP), Migros provides fresh produce to its customers by bringing them from the field to the shelf in just 30 hours. The company also owns Turkey's largest integrated meat processing plant. All production processes carried out in the plant are certified by the

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Turkish Standards Institute (TSI). This system, implemented for red meat, has been also a very important reference for Turkish farmers. "Within the scope of sustainability studies, new products were added to the range of branded products that support a healthy diet and lifestyle, and the number of products whose packaging included the 7 key nutrition items was increased." All food and non-food products sold in Migros complied with the Turkish Food Code and relevant legislation. A total of 21,647 quality parameters of 5,311 food products and 3,582 quality parameters of 277 non-food products were subjected to verification analyses in relation to product safety during 2015. CarrefourSA and METRO implements related standards for food safety and quality, also CarrefourSA with its initiatives as "from farm to table", "from sea to table" aims to bring the products to the retail shelf as quick as possible offering its customers fresh and quality products.

Retailers' role regarding sustainability and customers is twofold. First part is related with customer satisfaction however also retailers might hold a role of educating and motivating customers to behave more sustainably. This role of retailers may seem to be contradicting with the main aim of retailers which is to motivate customers to buy more. However, at least retailers may lead customers to healthier choices and educate them about the true usage and disposal ways of products and wastes. For example, Migros sold olive saplings grown by Aegean Forest Foundation and the revenues obtained from them were used for creating new forest areas. Additionally, Migros encourages its customers to separate household paper, plastic, metal and glass wastes and leave them in separate recycling bins which were launched for the first time in 2010 in their stores. Also by bringing waste to the recycling points, environmentally conscious customers had the opportunity to win a cloth bag, adopt a sea turtle (which are rapidly becoming extinct) or donate a sapling to the Migros Customer Forest. Besides, in partnership with Unilever, customers contributed to recycling by leaving cosmetic and detergent group plastic product packages at recycling points within the framework of the recycling project launched by Migros in 2014. Customers earned a 25% discount for detergent and personal care products of Unilever by leaving their packaging waste in the relevant sections in the recycling points. A 20.2% increase was achieved in the recycling rate when compared to the previous year within the project. Other than those activities through its Facebook account MİGROS suggests its followers' ways to use products. Also in its retail stores the retailer with the in-store communication tries to educate and inform its

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customers about good agricultural practices and quality standards. Also on the refrigerator doors there are warnings that say "close the refrigerator doors for contributing to a greener world". However, no communication to customers regarding sustainability was seen in BİM stores except for the one that informs customers about why the retail stores are decorated kind of simply, and why there is no promotion and why there is just enough number of employees working around, and how those kind of strategic decisions are in turn reflected to customers as cheaper prices. Also paper and battery collection boxes are existent in the stores. CarrefourSA is also committed to activities leading to the cultivation of conscious generations especially in the area of separating package wastes and enabling them for the recycle process. METRO especially through its Facebook page tries to educate its customers about some sustainable applications.

### **Relationship with Publics**

Relationship with publics has many facets however, under this categorization, voluntary responsibilities of retailers and their relationships with the society were considered. Three of the retailers give information about their relationship with publics. In this respect it is seen that, Migros plays an active role with different social responsibility projects and with the help of different NGO partnerships to support community development. Some projects the retailer has been included are: adopting rapidly becoming extinct sea turtles which is aimed at protection of biodiversity launched with the WWF (The World Wide Fund for Nature); Waste separation project in the head office, where wastes were separated at their source as packaging, paper, glass and organic waste and therefore helped ensure that this waste supported the country's economy. Thus, within the last 4 months of 2015, 18 tons of packaging waste and half a ton of glass waste was collected in the head office, with this waste then recycled by licensed companies. Likewise, for the social responsibility project for World Environmental Day to raise awareness of environmental cleanliness, Migros staged a clean-up of the Caddebostan seaside, on the Asian side of Istanbul and also a clean-up of the Bakırköy seaside on the European side, with the voluntary participation of its employees. Migros employees, who set out with the motto of "Our Environment, Our Coast" in the event organized for the second time in 2015, encouraged everyone to be sensitive about environment by collecting rubbish along the seaside. In partnership with ÇEVKO, Migros also launched a training program for consumers, aimed at

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raising awareness of meeting social and economic needs of future generations and creating a future where people and nature can coexist in productive harmony. The focus of the training practice is the necessity of separation and collection of packaging wastes from household wastes. Migros' "Special Support for Special Athletes" campaign, that has been ongoing for more than ten years, is a social responsibility project in sport. Almost 5,000 young people with special needs are encouraged to play a more active role in society through the sports support given to them. Also the retailer has many donation programs like the "Children's Clothes Donation Campaign" that has been conducted jointly with Ariel; donation of some of the revenues obtained from the sales of products in the Mother-Baby Catalogue to the Turkey Foundation for Children in Need of Protection and supported children's education; and donation of products that have passed their sell-by date from more than 200 stores to the Animal Rights Federation (HAYTAP) in support of its efforts to feed street animals.

Although BİM has undertaken some social responsibility projects in previous years as could be seen from the earlier annual reports (i.e. 2011) of the company, no information regarding corporate social activity in the 2015 annual report or web page was existent.

METRO has undertaken an implemented corporate social responsibility projects in the areas of sustainable agriculture, fishing and farming. The company is a global company that place great value to locality. Accordingly, the retailer has launched a valuable project regarding the recording and protection of cultural flavors and tastes of Turkey named "geographic marked products". Today more than 60 local products in danger of disappearing are supported in a sense by giving them the chance to reach to a larger customer base not just in Turkey but also in branches of the retailer in other countries. In addition, the retailer aiming to be a leading platform in Turkey for gastronomy has put into operation "Gastronometro", a platform whereby all the suppliers, professionals and customers would have the chance to meet. Also to support the ignored regional cuisine and create awareness, in 2000 "Metro Gastro Magazine" was launched. Also they make investments for local seeds and geographically marked products both supporting the local economy and suppliers and protecting the cultural tastes of Turkey. Metro with its cultural publications focuses on Turkish cuisine and culinary culture and they care about ethnographic studies. They work with professional researchers to make publications and create awareness about the importance of local animal species that are being lost and

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products with geographical indication. They have published 10 books of which the income is also used for giving charities.

CarrefourSA, with its "Clean Environment, and Life without Barriers" project initiated the collection of vegetable waste oil in 2014, and has collected 23 tons of waste oil. The income obtained from recycled oil was used to meet the needs of citizens with disabilities. Also with its "Food Banking" project surplus product, products approaching to expiry date, were donated to citizens that are in need

### **Relationship with Suppliers**

It has been stated previously that retailers can play an important role for pushing suppliers to be more sustainable. Managing the supply chain is critically important because research indicates that between 80 and 90 per cent of the retailer's total footprint comes from the products that are carried (Evans, et.al. 2009). All retailers are playing an active role in a sense in this respect, since all have stated a control of the products from their purchase to the point they reach the consumer and they have some procurement policy that contains quality and environmental standards. However, those standards need to be examined further to see if they are basically the standards demanded by law or surpass it.

However, when the sub themes are investigated in the available reports it is seen that each retailer shows or states a different amount of commitment to their relationship with suppliers regarding sustainability. Attaching great importance to supplier selection, Migros follows suppliers' practices, assisting and providing guidance to suppliers with the aim of increasing their performance. Migros has been implementing a specific audit program for its suppliers in order to improve their performances regarding employee rights, health and safety, work ethics, environmental impact and safe production. For example, in 2015, Migros began to monitor its suppliers' usage of certified soy and palm oil regarding deforestation. The objective of this monitoring was to create awareness among suppliers about sustainable farming practices. Also Migros educates its suppliers and provides consultancy to encourage farming with GAP. Metro, in addition to applying quality standards to its suppliers, supports local suppliers especially in the areas for fishery with different projects like 'Palamutlar Nerede?', 'Kızına bak anasını al'. However, the other two retailers do not provide extra information regarding their relationships with the suppliers.

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As a result, all retailers offer information regarding their sustainability applications; however, information regarding how they actually integrate sustainability is not very clear for BİM and METRO. Migros reflects its commitment to sustainability more in its annual report and web page. In Migros, management of sustainability is handled at the board level and manages it through the Sustainability Committee, and the issue of sustainability is positioned as the mutual responsibility of all employees within the company. The Board of Directors at Migros is responsible for defining strategic approach towards sustainability issues such as climate change, environment, biodiversity, human rights, health and safety, governance and work ethics, responsible business practices and social development. It is first and only retailer to be admitted to the BIST Sustainability Index. Also the retailer integrates the sustainability approach to its management system by different certifications like Migros TS EN ISO 14001 Environmental Management System certificate which they aim to obtain in 2016; OHSAS 18001 Occupational Health and Safety Management System Certificate; TS EN ISO 9001 Quality Management System; TS EN ISO 22000 Food Safety Management System; TS ISO 10002 Customer Satisfaction Management System certificate; Good Agricultural Practices (GPA) Group Certificate . In addition to these certificates, Migros holds the Organic Entrepreneur Certificate for its fruit and vegetable warehouses in Izmir and Bursa, and 7 GAP (good agricultural practices) group certificates in 18 fruit and vegetable products. CarrefourSA have launched necessary studies to comply with the ISO 22000 standard, including the HACCP for a risk-based food safety management system.

## **CONCLUSION**

Resource efficiency, sustainable consumption and production have been stated as the main goals of the agenda of sustainable development for the year 2030 (UNEP, 2015: 42), and retailing is a sector that has the ability to influence all the three stated dimensions of sustainability (efficiency, consumption, production). Retailing sector plays a very important role in sustainability - not only as a major driver of the global economy, but also as the most crucial link between suppliers and consumers. This link and the power they have enables retailers to force suppliers and customers for more sustainable choices. On the other hand, integrating sustainability applications to retailing may not be very easy because companies committed to incorporating sustainability concerns into product decisions are confronted with handling thousands

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of goods and materials and optimal sustainability decisions requires evaluating sustainability in terms of environmental, social and economic aspects which may be very complicated. However, given the retailers' important role in sustainability and stakeholders increased expectations, retailers are expected to be more proactive within this respect.

Research regarding the sustainability applications of retailers in Turkey is very limited. Thus, the aim of this paper is to provide an exploratory general review of the publicly reported most recent sustainability reports of largest four retailers in Turkey, to understand where they are standing with respect to sustainability. For the analysis an internet search of their web sites and social media accounts (Facebook) exploring their "sustainability" reports and statements, was undertaken. Also actual observation visits to the researched retail stores to identify the in-store sustainability applications was carried out. It is seen that all the retailers are addressing sustainability agendas. However, the Internet search related to sustainability applications of the retailers revealed considerable variation in the volume and detail of information.

It is seen that Migros puts most emphasis on the reporting of its sustainability applications compared to other retailers. It follows GRI principles in reporting of sustainability and almost all the sustainability dimensions are comprehensively covered and actions are taken regarding all the themes and sub-themes. CarrefourSA provides information about its corporate social responsibility activities in its corporate web site and offers information on its sustainability activities as part of its annual report. METRO has published its first sustainability report in 2015 and the report has been prepared in accordance with, the Global Reporting Initiative (GRI) G4 Standards. Also the retailer offers information about its sustainability initiatives on its corporate web page, and Facebook page. BİM mostly focuses on economical dimension of sustainability and puts emphasis on waste management, food quality and safety and customer satisfaction which are also the basics of sustainability.

As a summary the relationship the retailers maintain with their customers is very important for their sustainability. Thus all the retailers emphasize the importance of creating value and satisfaction for their customers. Since analyzed retailers have different target markets, they create value in a different way for their customers, however, it seems that customer health and safety is a priority for all of them. This is an expected finding since customer safety and health is an obligation for retailers. However, devotion to, and the effort shown by each retailer for

consumer health were different. Since consumer health is a priority for all the retailers, it is seen that they are focusing mainly on product and food quality, and quality control of the production facilities of the suppliers. Also all the retailers emphasized the motivation and education of customers to behave in a more sustainable sense. However, this was a very limited kind of motivation for most of the retailers, such as motivating them to use less shopping bags or using the recycling bins. One retailer makes campaigns to train people on the necessity of separation and collection of packaging wastes which is very important for the Turkish market since customers are not very sensitive on this topic. At the same time, visits to the retail stores showed that despite some information in one retailer customers are not provided with detailed information at the point of sale that would allow them to take responsibility for sustainable consumption through their individual purchasing decisions. On the contrary, the promotions were aimed to increase consumption and eventually lead to overconsumption. However relevant marketing communication can help consumers to find, choose and use sustainable products and services, by providing information, ensuring availability and affordability.

From the environmental sustainability dimension waste management was the mostly utilized sustainability activity. All the retailers apply simple things like providing environmental friendly bags or recycling boxes within store and most of them emphasize recycling and minimization of waste. As for the economic dimension of sustainability, the retailers actually did not cover it under sustainability activities and since the spillover effects of those kind of retailers might be huge (i.e. they may lead small grocery stores to bankruptcy) understanding the overall sustainability effect for the country needs a deeper examination. Overall it could be said that all the retailers are undertaking sustainability activities whereas a deep and strategic commitment to sustainability is limited. Also just keeping up with the laws and regulations related with sustainability does not show that the retailers are in fact devoted to sustainability.

Last but not least, some limitations of the study should be highlighted. Firstly, it should be kept in mind that this is an exploratory initial study with four cases and the results reflect the data quality of self-reports by each organization, their most recent annual reports, sustainability reports and web pages which can present some bias compared to organizational reality. Also some of the sustainability activities undertaken by the retailers may not have been reported since

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they are activities that must be done regarding to laws and regulations; and some activities might be provided as sustainability applications even though they are enforced by laws and regulations.

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