



Seafood Sustainability & Corporate Responsibility

Alaskan Seafood Forum on Sustainability

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Peter Hajipieris

Birds Eye Iglo

Director of Sustainability & External Relations





- 1. Who is Birds Eye Iglo?**
- 2. Understanding our Challenges**
- 3. Sustainability – a perspective**
- 4. Sustainability – a mainstream activity**
- 5. Sustainability – a journey not a destination**
- 6. Summary**

Who is Birds Eye Iglo?



Leading European frozen food business



- # 1 company in Europe
- \$2.25 bn sales
- Household brands
- UK, Germany, Austria, France, Belgium, Portugal
- Majority of sales - Fish

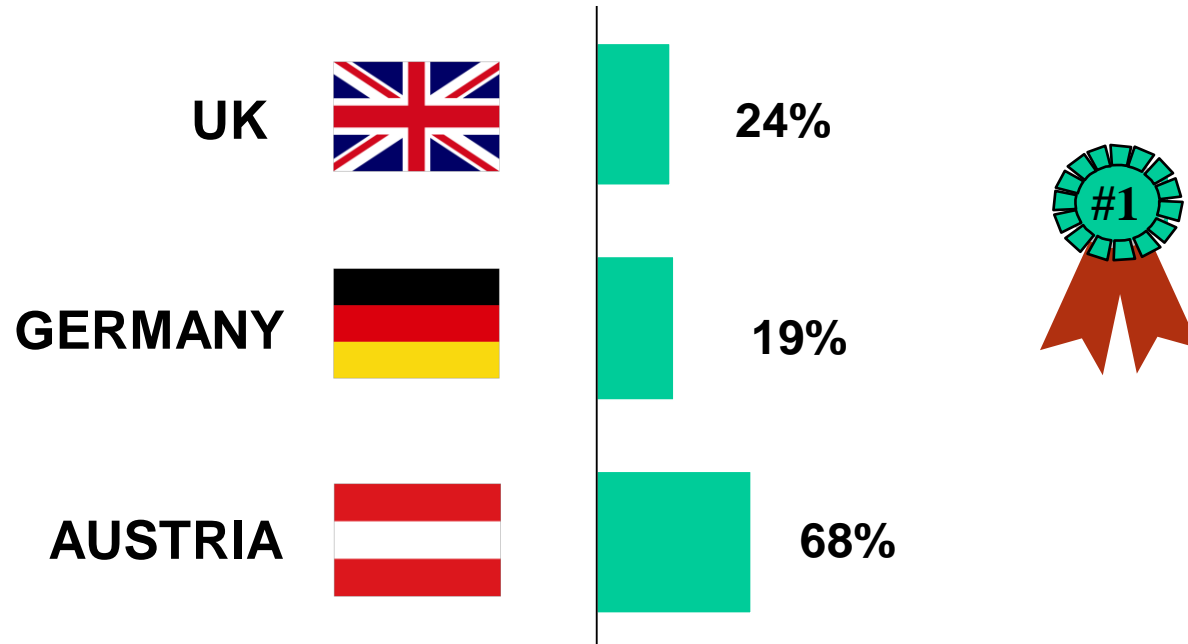


- **3 world class facilities**
- **1 in UK & 2 in Germany**
- **Largest frozen fish factory in the world**
- **78% of production in-house**
- **22% outsourced**



Birds Eye Iglo Market Share in Core Categories in 2007

Fish



Understanding our Challenges

Reminder of our Challenges



• Resource Depletion • Environmental Impact • Socio-Economic

• Food Safety • Quality & Freshness • Waste

Fisheries Management Challenges



Status of World Fisheries

- IUU Estimates: 25%
- World Discards: 8%
- EU Discards: 20%

EU fisheries rated
as 81% 'overfished'

- Aquaculture hurdles:
- Wild-capture fish/oil demand
 - Environmental challenges

- Weak Monitoring, Control and Surveillance
- Governance, Policy and Confidence issue.

- Resource Depletion Risk
- Ecosystem Impact
- Socio-Economic Risks

Sustainability....

.....a perspective

'Sustainability' is classic industry Change



1985

1990

1995

2000

2005

2010

Overfishing

HAZOPS/HACCP

TQM & ISO 9000

Processing Best Practice

Auditing Harmonisation

Quality-Freshness

EU Fishery Reg's

Corporate Responsibility

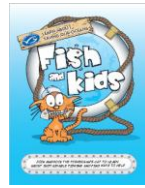
Aquaculture Awareness of Issues

Sustainability

IUU & Discards

(Illustrative)





Business to Business (B2B) Certification Schemes



1. Alaska Quality Seafood (AQS), US
2. Alter-Trade Japan, Japan
3. Australian Prawn Farmers Association, Australia
4. BioGro, New Zealand
5. BioSuisse, Switzerland
6. Blue Angel, Germany
7. Carrefour Quality Line (CQL) Shrimp
8. Environmental Justice Foundation (EJF)
9. GlobalGap
10. Fundacion Chile, Chile
11. Food Certification Scotland (FCS), UK
12. Global Aquaculture Alliance (GAA) / Aquaculture Certification Council (ACC)
17. International Federation of Organic Agricultural Movements (IFOAM)
18. International Feed Standard Alliance - IFSA
19. International Principles for Responsible Shrimp Farming
20. International Standards Organization (ISO)
21. KRAV KRAV, Sweden
22. Naturland, Germany
23. Organic Food Federation, UK
24. Safe Quality Food (SQF) / Salmon of the Americas (SOTA) Farmed Salmon Cert.
25. Shrimp Seal of Quality (SSOQ), Bangladesh
26. Soil Association, UK
27. Tartan Quality Mark (TQM), Scotland
28. Thai Quality Shrimp, Thailand
29. Wild American Shrimp, US

Adapted with kind permission from R Bing, Darden's Restaurants

Sustainability...

.....now a mainstream activity

Consider a Public listed Seafood Business



Shareholder Needs

- **Clear long-term strategy**
- **Good Governance**
- **Transparency**
- **Strong Performance & ROI**

- **Corporate & Social Responsibility
(Sustainability)**
- **Customer Needs
(‘Safe, Responsibly Sourced Food’)**

'Birds Eye View'



- **Climate Change**
- **Waste & Packaging**
- **Water Use**
- **Transport Miles**
- **Sustainable Sourcing**
- **Ethical Sourcing**



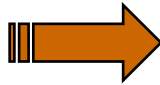
- **Positive Nutritional Balance**
- **Healthy Lifestyles**
- **Product Labelling**

But operational basics still apply



Customer Feedback

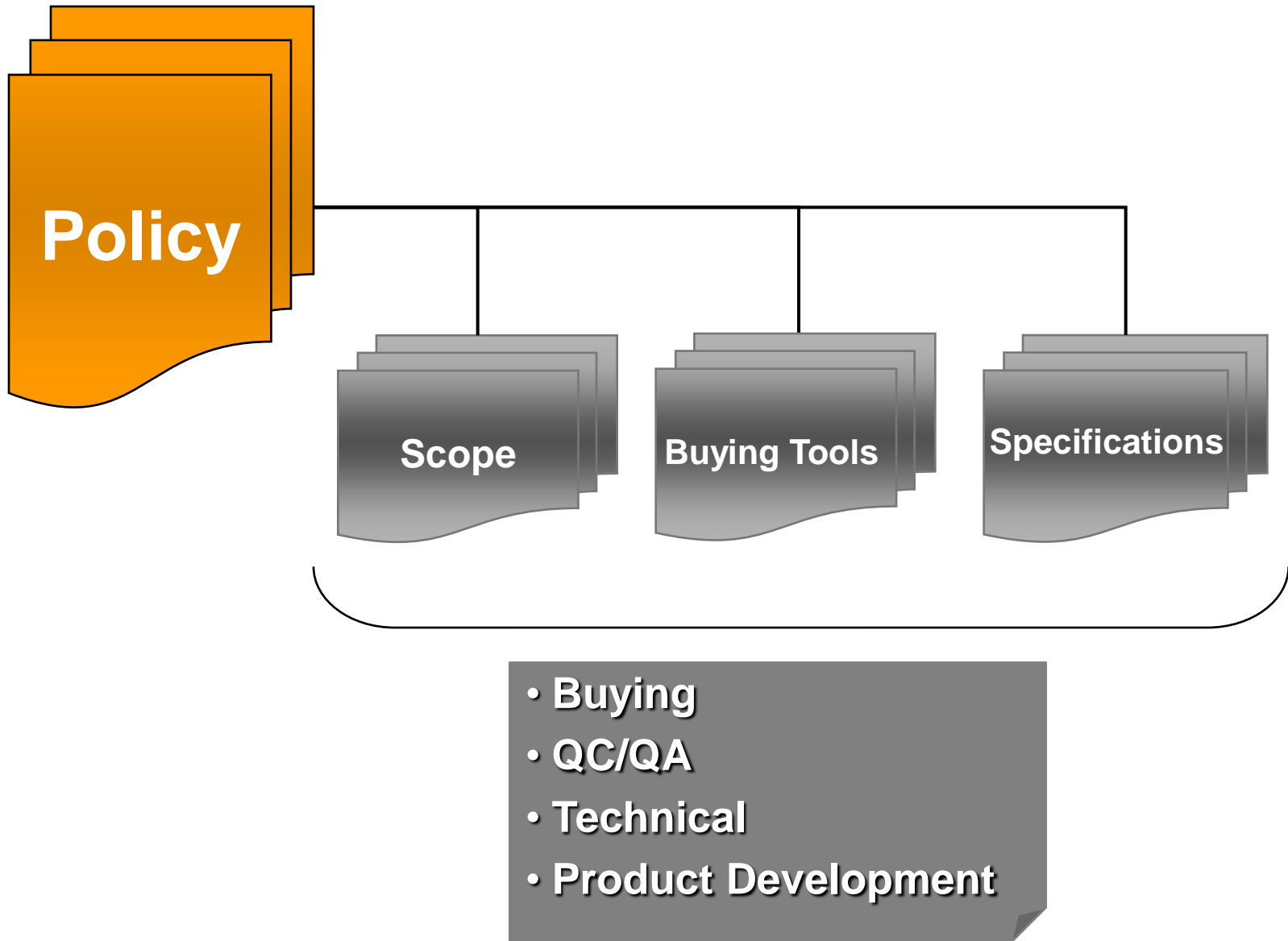
1. Price
2. Best Before date
3. Freshness/Waste
4. Physical appearance
5. Food safety
6. Climate Change
7. 'Sustainability'
8. Packaging



Industry Needs

1. Product Shelf Price Transparency
2. Quality & Freshness
3. Quality & Freshness
4. Quality & Freshness
5. HAZOPS/HACCP
6. CSR
7. 'Sustainability'

Typical Business Tools



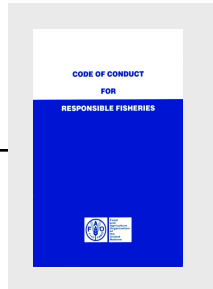
Sustainability

**.....a journey not a destination but
..what can it look like?**

Tackling Challenges – needs Global Standards

Status of World Fisheries

One Globally Harmonised Standard exists for wild-capture:
The UN Food Agricultural Organisation's Code of Conduct for Responsible Fisheries.



No equivalent standard exists for Aquaculture Certification yet.

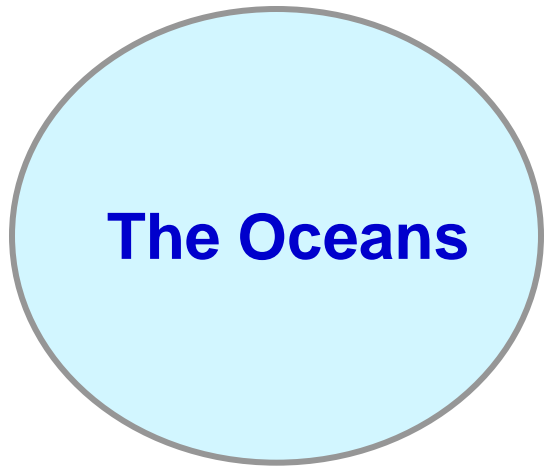
There are over 25 Business to Business Aquaculture Certification Schemes.



Seen

- Policymakers
- eNGO's
- Supply Chain
- Retailers

Heard



Recognised

- Fisheries – ‘Our Culture’
- Fisheries – ‘Our Heritage’
- Fisheries – ‘Our Identity’
- Fisheries – Socio- economic

We all have shared responsibility



- Government
- Fisheries Bodies
- National Fisheries



• Catching Sector



• Suppliers



• Retail

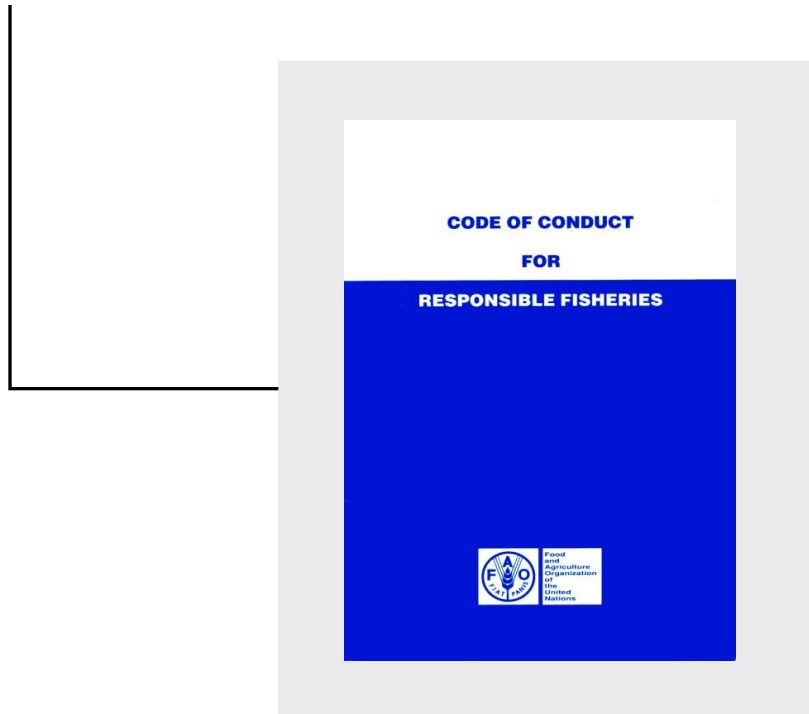
“Sustainability is too important to leave it to the market”

**Quentin Clark
Waitrose Ltd, UK**

- **Regulatory Framework**
- **Use robust Science**
- **Catching Effort/Capacity/Techniques**
- **Quotas**
- **Monitoring, Control & Surveillance**

it's their job!!

- Operate to a globally harmonized standard
- Alaskan Fisheries - excellent example of this



Summary.....

National Bodies:

- Democratically Elected
- Funded by taxpayer
- To feed population
- Protect fisheries
- Socio-Economic

Industry:

- Source from FAO Code compliant fisheries
- Work to eradicate IUU
- Work to reduce Discards
- Harmonise Standards

eNGO's:

- Use Science
- Accept +ve Change
- True Collaboration
- Harmonise approach
- Understand industry

- Regulatory
- Vessel Capacity
- Science/Quotas
- MCS

- Positive Change
- Develop Policy
- Integrate Tools
- Invest in Seafood Sustainability
- Education
- Honest Marketing



Thank You

