



FMI Sustainable Seafood Toolkit (PowerPoint Presentation)



THE VOICE OF FOOD RETAIL

Feeding Families  Enriching Lives

FMI Sustainable Seafood Initiatives for Retailers

Doing together what we can't do alone.....

1. Who Are We?
2. What Are We Doing?
3. Some Storytelling...
4. How Can This Help You?
5. Hurdles, Opportunities
6. Future...



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About the Food Marketing Institute



- Our Mission: Feeding Families and Improving Lives
- 1,500 supermarket/wholesale member companies worldwide
- Government, food safety, education, media and consumers
- Chartered member sustainability initiative in 2006, 26 companies
- Sustainability = A Strategic Priority of FMI Board, 81 CEO's

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What is Sustainability?

Actions, lifestyles and products that meet current needs without sacrificing the ability of future generations to meet theirs.



Business strategies and practices that promote the long-term well being of the environment, society and the bottom-line.

FMI Sustainability Executive Committee Definition

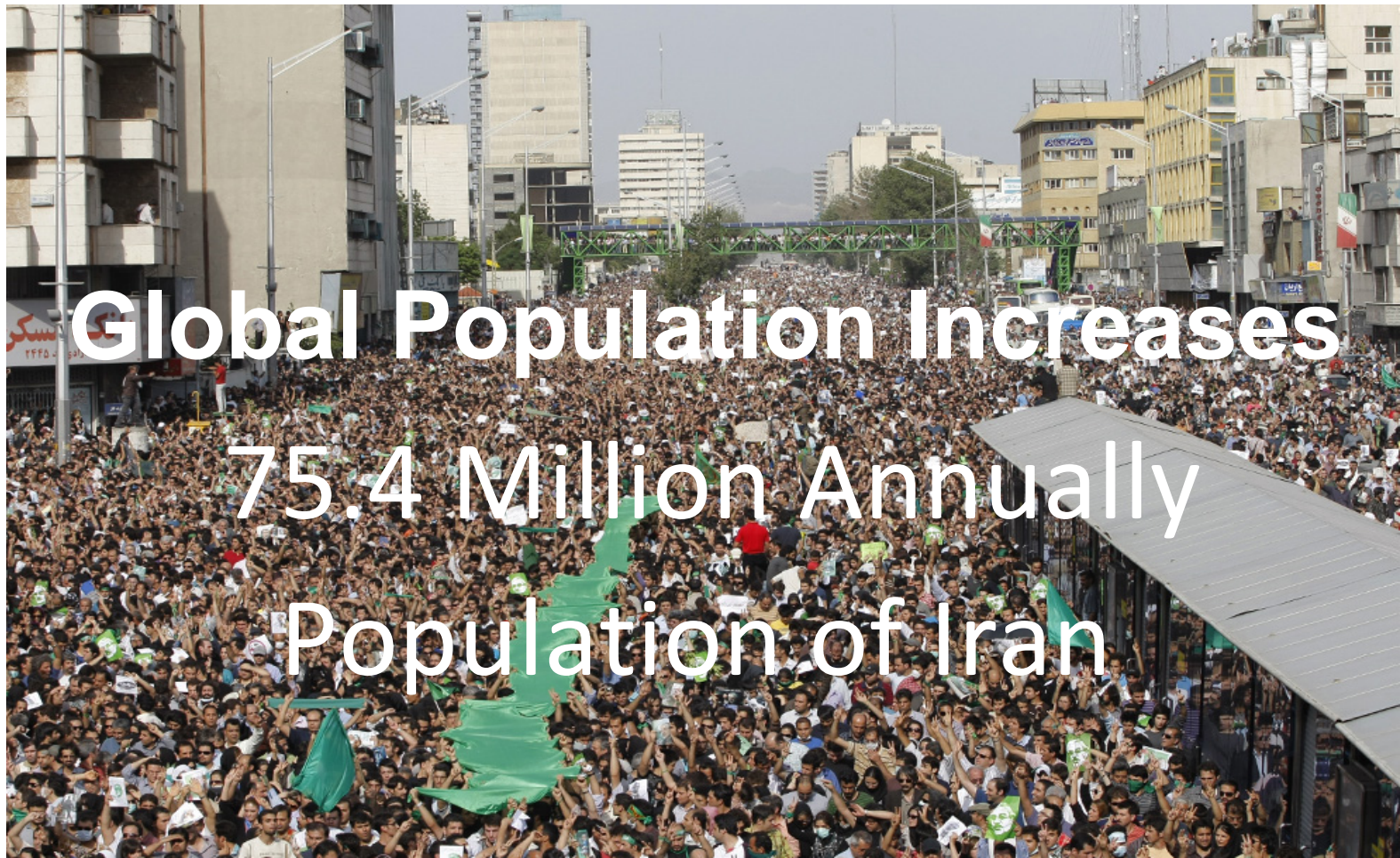
A HEALTHY balance = People, Planet and Profits

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Global Population Increases 75.4 Million Annually Population of Iran

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**In 40 years, the world
will need 100% more
food than we produce
today.**

Source: Science Magazine, 2005

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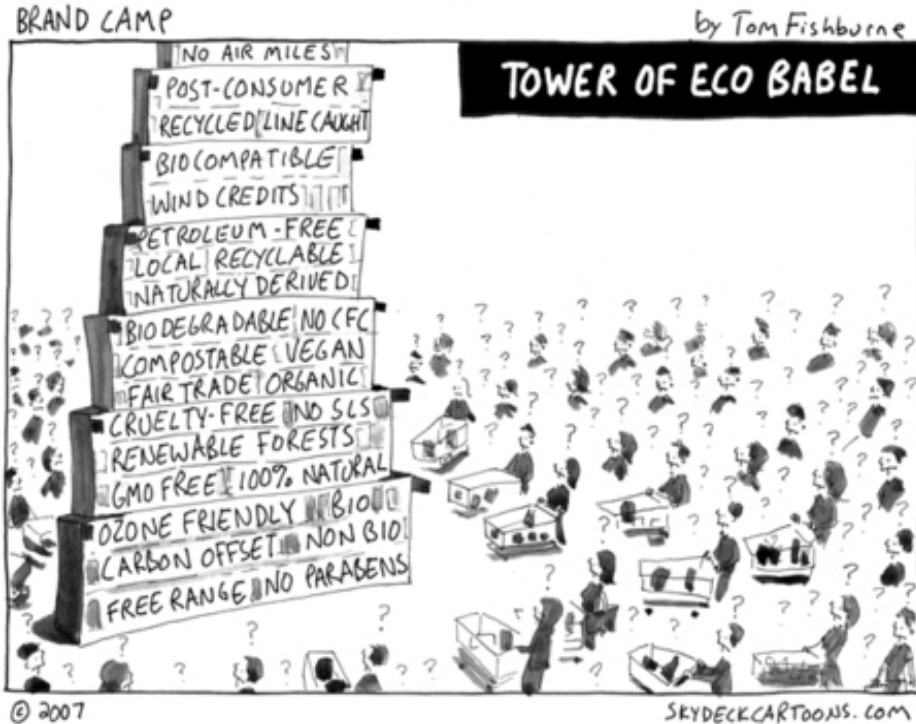
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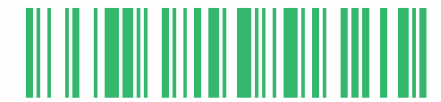
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An Increasingly Confusing and Complex Marketplace:

Warning: This “green” label may cause the customer anxiety, blurred vision, severe headaches or dizziness, an exaggerated sense of well-being, yawning, irritability and/or a decreased desire to save the Earth.



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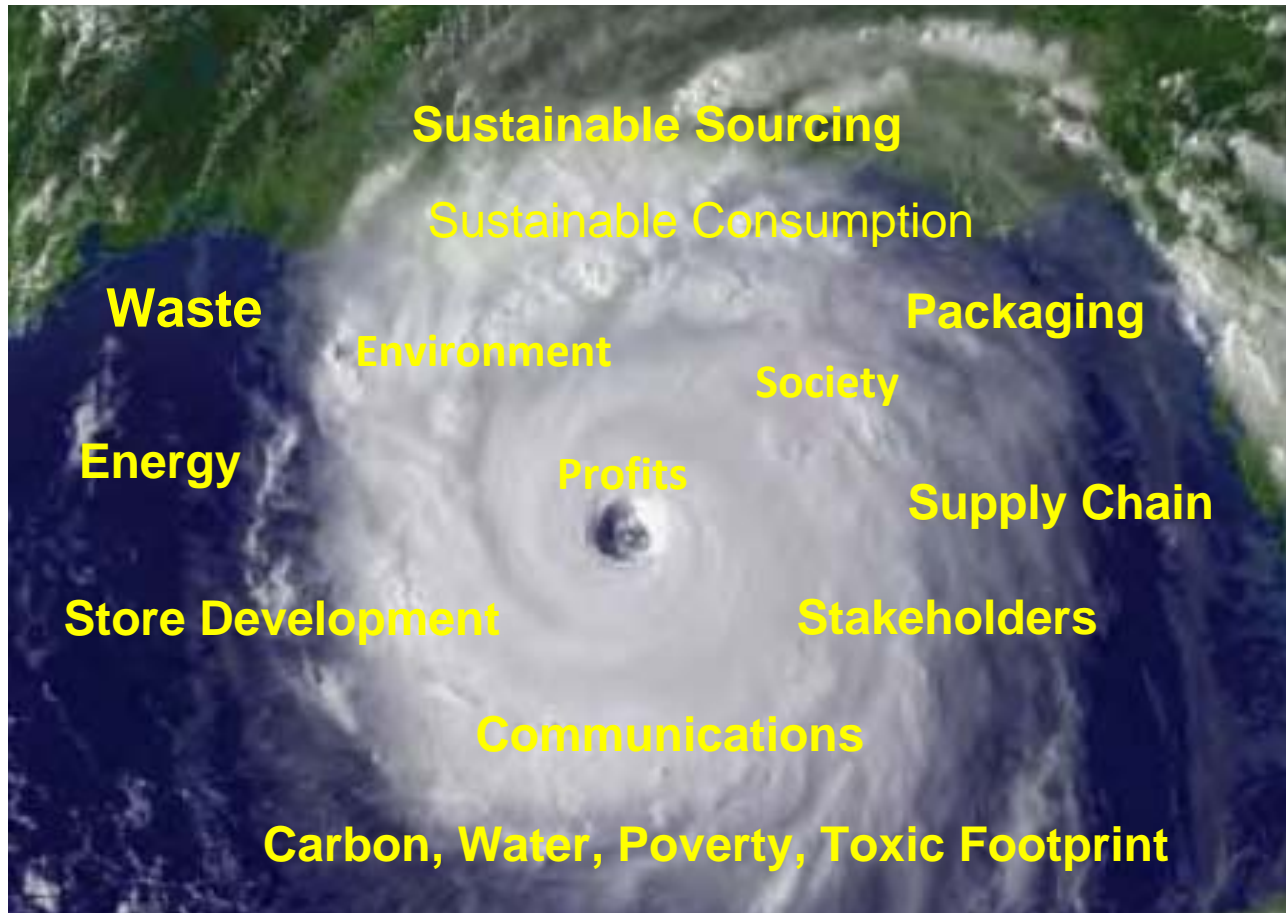


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Complexity...in the eye of a hurricane...



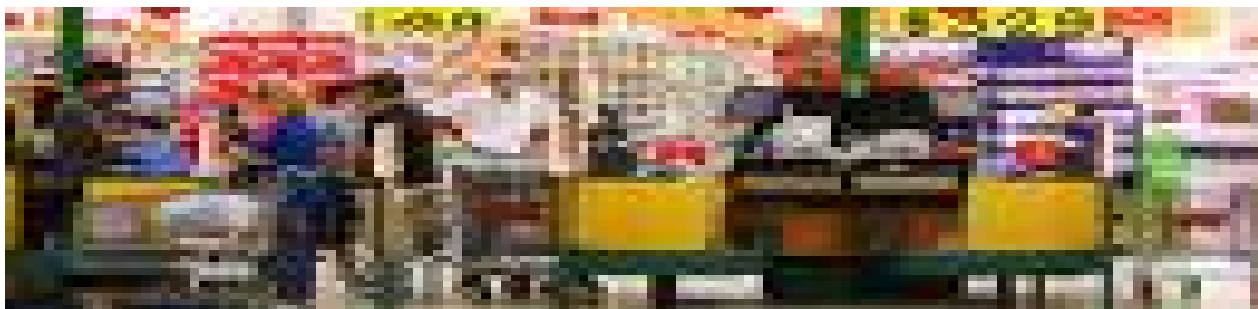
Source: NWS

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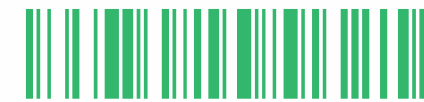
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Retailers Engage to Move the Industry Forward Faster



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Engagement: FMI Sustainable Seafood Committee

Mission:

To identify the issues, establish priorities and develop tools and resources needed to move sustainable seafood forward faster in our industry.

Ahold USA
Fresh and Easy
Neighborhood Markets
Giant Eagle
Delhaize USA
Haggen
Harris Teeter
H-E-B

Hy-Vee
King Supermarkets
The Kroger Co.
Loblaw Cos. Ltd.
Price Chopper Supermarkets
Publix Super Markets
Raley's Family of Fine Stores
Safeway

Schnucks Markets
Sobeys
Supervalu
Target Corp.
Wakefern Food Group
Wal-Mart Stores
Wegmans Food Markets
Winn-Dixie Stores

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What's the Problem?

Hurdles:

- Conflicting, contradictory information
- Media & marketplace confusion
- Complexity – we are not scientists
- Consumers not “there” yet



Opportunities

- Collaboration changes markets
- Reduce marketplace and regulatory risks
- Harness the power of emerging consumers
- Strategic advantage for leaders



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Action: Free Industry Tools and Resources



Sustainability on the Shelves:
A Guide for Category Managers & Buyers

Sustainability

Webinar



- Created “for industry by industry”
- Sustainable Seafood 101’s
- Sustainable Seafood Resources List
- Sustainable Sourcing Guide – Seafood
- Seafood Sourcing Webinars
- Toolkit – coming soon

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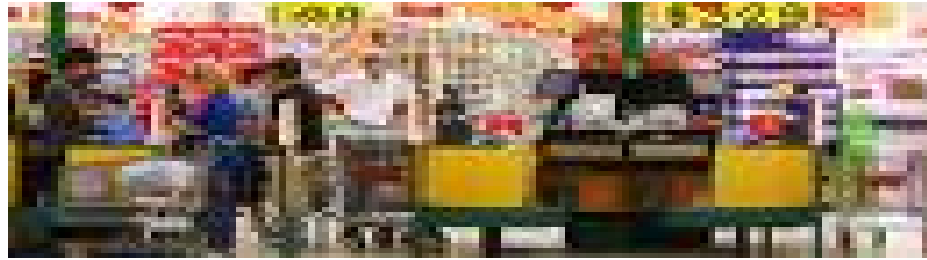


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Action: Progress – After Two Years



- 90% either working on or have policy/mission/guidelines
- 60% engaged with environmental organizations
- 70% engaged on sustainability with their suppliers
- Traceability is one of highest priorities, rates 4.1 (on 1-5)
- Complexity and inconsistency are two most significant challenges
- Industry is leading, but consumers will catch up and hold us accountable.

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Action: NEW Retail Sustainable Seafood Toolkit



- Free gift to our industry!
- Case Studies and Best Practices
- Stories from 14 Retailers
- How To's & Examples
- Guidelines/Checklists
- Resources



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Sustainable Seafood Toolkit - Purpose



The purpose of the Sustainable Seafood Toolkit is to assist food retailers with the integration and implementation of seafood sustainability procurement policies and procedures.

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Sustainable Seafood Toolkit – Special Thanks

The following individuals contributed to the publication:

- Rich Castle (Giant Eagle)
- Phil Gibson (Safeway)
- Bea James (Lunds and Byerly's)
- Howard Johnson (H.M. Johnson & Associates)
- Gerald "Jerry" Knecht (North Atlantic, Inc.)
- Mike Kraft (Bumble Bee)
- Chris Lischewski (Bumble Bee)
- Mike Loftus (Raley's)
- David Long (Kroger)
- Dawn Martin (SeaWeb)
- Shawn McMurter (Sobeys)
- George Parmenter (Delhaize America)
- Guy Pizzuti (Publix)
- Michael Smith (Hy-Vee)
- Rex Stewart (New Leaf Community Markets)
- Tania Taranovski (New England Aquarium)
- Tracy Taylor (Ahold USA)
- Paul Uys (Loblaw Companies Limited)
- Denise Webster (Fresh & Easy)
- Jeanne von Zastrow (FMI)

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Sustainable Seafood Toolkit - Background

CONSERVATION
ALLIANCE FOR
SEAFOOD
SOLUTIONS

In 2008, the Conservation Alliance for Seafood Solutions, released the “Common Vision”, which identified six critical areas retailers could take to ensure a sustainable seafood supply and protect ocean environments. These steps included:

1. Making a commitment sustainable seafood.
2. Collecting data on seafood products.
3. Buying environmentally responsible seafood.
4. Making product information publicly available.
5. Educating customers, suppliers and employees.
6. Supporting reform to improve fisheries and aquaculture management.

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Sustainable Seafood Toolkit – Contents

Making the case for sustainable seafood

- New Leaf Community Markets

Evaluating the seafood category

- Publix Super Markets

Developing a seafood policy

- Ahold USA

Connecting with peers

- Raleys Family of Fine Stores
- The Kroger Co.

Partnering with NGOs

- Safeway Inc. and FishWise
- New England Aquarium

Engaging suppliers

- Loblaw
- Bumble Bee Foods, LLC
- North Atlantic, Inc.

Getting the facts

- Sobeys
- Giant Eagle

Engaging employees

- Delhaize America
- Lunds and Byerly's

Engaging customers

- Hy-Vee
- Fresh and Easy

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Sustainable Seafood Toolkit – New Leaf



In 2002, New Leaf worked with Teresa Ish and Shelly Benoit to run a pilot program focused on sustainable seafood. Ish and Benoit helped the retailer to identify and switch to environmentally preferable seafood products.

They also developed messages informing customers about the overexploitation of fisheries and the environmental, economic, and quality benefits of more sustainable options.

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New Leaf
Community Markets

Build a Case

A Guide to New Leaf's Sustainable Seafood Signage

Our seafood signs are color-coded for sustainability and marked with the catch or farming method as well as the country of origin.

GREEN

SUSTAINABLE Fish caught or farmed in an ocean friendly manner with minimal impact on the ecosystem.

YELLOW

SOME CONCERNS Population of these species may be healthy, but there may be some impact on the ecosystem, or poor management of the fishery or farm.

Source: www.newleaf.com

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Sustainable Seafood Toolkit - Publix



In an effort to communicate the new company direction and commitment to seafood sustainability, Publix hosted a Seafood Sustainability Summit in May of 2009 for their 70 seafood suppliers.

Three environmental groups — the Ocean Trust, Ocean Conservancy and the Sustainable Fisheries Partnership (SFP) — provided Publix with knowledge, guidance and expertise on the complex issues of seafood sustainability.

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Evaluates the Seafood Category



Source: Guy Pizzuti, Publix Super Markets

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Sustainable Seafood Toolkit - Loblaw



Loblaw introduced a new product called WiseSource Salmon, a farmed Atlantic salmon raised using a method called Integrated Multi-Trophic Aquaculture (IMTA).

IMTA is a method of growing multiple and complementary organisms in proximity to provide healthier waters through a balanced ecosystem management approach.

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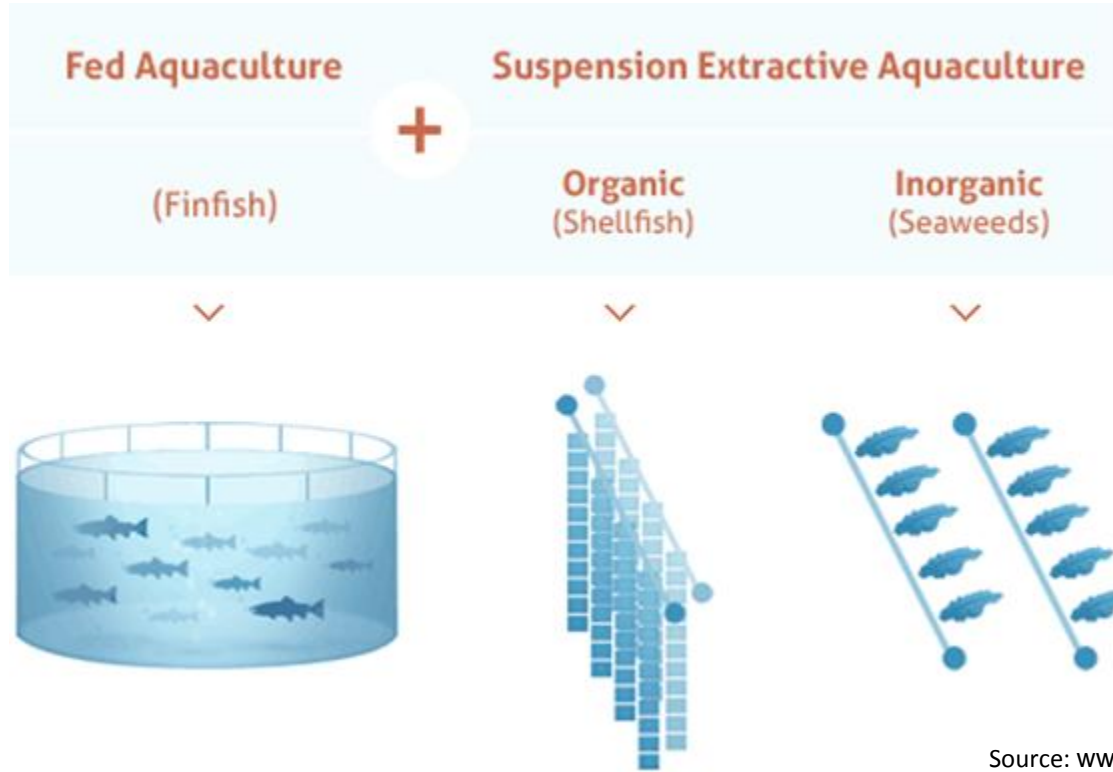


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Offers WISESOURCE™ Salmon



Source: www.oceansfortomorrow.ca

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Sustainable Seafood Toolkit – Bumble Bee

BUMBLE BEE.



The International Seafood Sustainability Foundation (ISSF) was formed in 2009 with Bumble Bee as one of the founders.

The group helps drive the enactment of conservation measures at the Regional Fisheries Management Organizations (RFMO) level and works to address the main sustainability challenges associated with global tuna fisheries such as bycatch, fishing capacity and IUU.

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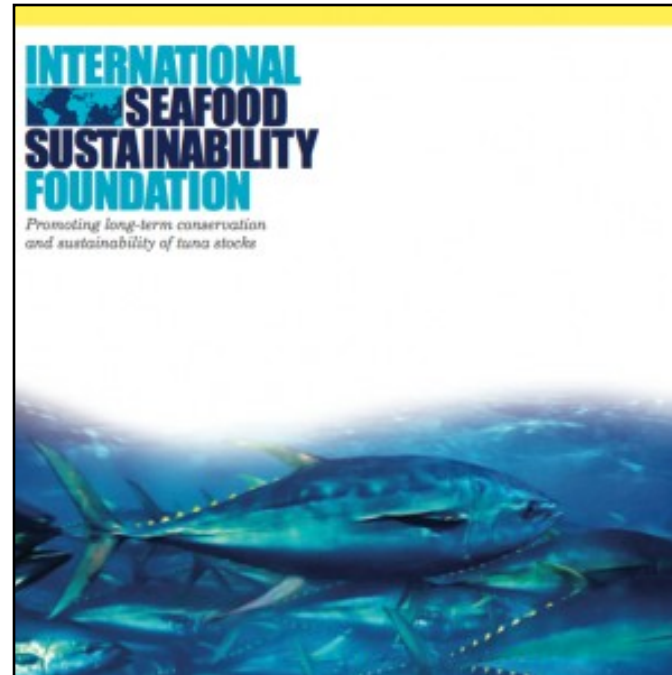


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Commits to ISSF



Source: www.iss-foundation.org

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Sustainable Seafood Toolkit – Lunds & Byerly's



Consumers are more aware of the environmental impacts of the foods they eat, and expect store staff to have a clear understanding of the company's commitment to and definition of sustainability.

Employee knowledge and ability to answer customer questions is a direct reflection on the company. Knowledge of key elements affecting each seafood product will help associates answer most customer concerns.

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Engages Employees



Source: www.lundsandbyerlys.com

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Sustainable Seafood Toolkit – Hy-Vee



Hy-Vee seafood counter clerks, chefs and dietitians provide customers with the tools and information necessary to make educated food choices.

“In many cases the best communication a retailer can do around sustainable seafood is to simply educate shoppers on how they can turn the sustainable seafood on display into an enjoyable meal for themselves and their families.”

--- Michael Smith, Assistant Vice President, Real Estate and Sustainability, Hy-Vee

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HyVee[®] Empowers Customers

EMPLOYEE OWNED



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Sustainable Seafood Toolkit - Opportunities

Strengths <ul style="list-style-type: none">•Collaboration with stakeholders•Industry momentum around sustainable seafood•Improved management of fisheries and farms•Commitments from retailers driving change	Weaknesses <ul style="list-style-type: none">•Proliferation of eco-labels•Consumer confusion•Complexity of the topic•Subjective interpretation of science•Conflicts among stakeholders
Opportunities <ul style="list-style-type: none">•Build trusting relationships with Stakeholders•Brand differentiation•Risk mitigation•Professional development/environmental education	Threats <ul style="list-style-type: none">•Population growth leads to increased demand for seafood•Misinformation•Financial uncertainty•Stock depletion•Customer distrust



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Project Initiation

The Aquarium was approached by Royal Ahold in 2000 to develop a project to improve the sustainability and traceability of their seafood in their Ahold USA stores



**New England
Aquarium**



Ahold USA, Inc.

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Partnership Objectives



New England Aquarium:

Facilitate major corporate seafood purchasing decisions that favor marine conservation and sustainable fisheries.

Ahold USA:

Distinguish themselves as a company that:

- anticipates customer concerns
- understands where its products come from and/or how they are produced
- is making an effort to address concerns

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- Program began with detailed reports and recommendations
 - Key items
 - Used by buying department only
 - Shift sourcing where feasible
- Program based on incremental improvement
 - Need to work with current resources
 - Improvements take time.
 - Big steps not usually an option



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- Saw need to increase efforts

- Review entire assortment

- Latin names and countries of origin
- Identify key items to begin work plans
- Identify “quick hits”

- Must engage suppliers



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Sustainable Seafood Policy

We have 10 rules that guide the purchasing practices of our company, and those of our sister companies around the globe.

1. Never knowingly buy illegal seafood
2. Purchase and sales (or prohibition of sales) decisions are based on social ecological, and economic considerations
3. Suppliers are selected and monitored based on a demonstration of continuous improvement in the sustainability of their operations
4. Seafood will be labeled with the legally required information
5. Sustainable seafood will be actively promoted
6. We are engaged in activities with other stakeholders to improve the sustainability of the seafood produced
7. Scientific research linked to the sustainable production of seafood is needed and supported
8. To ensure product integrity, the implementation of traceability systems is of crucial importance
9. We do not do business with suppliers who cannot fulfill their ethical and/or sustainability responsibilities
10. Communicate to consumers, associates, and shareholders about efforts to improve seafood sustainability



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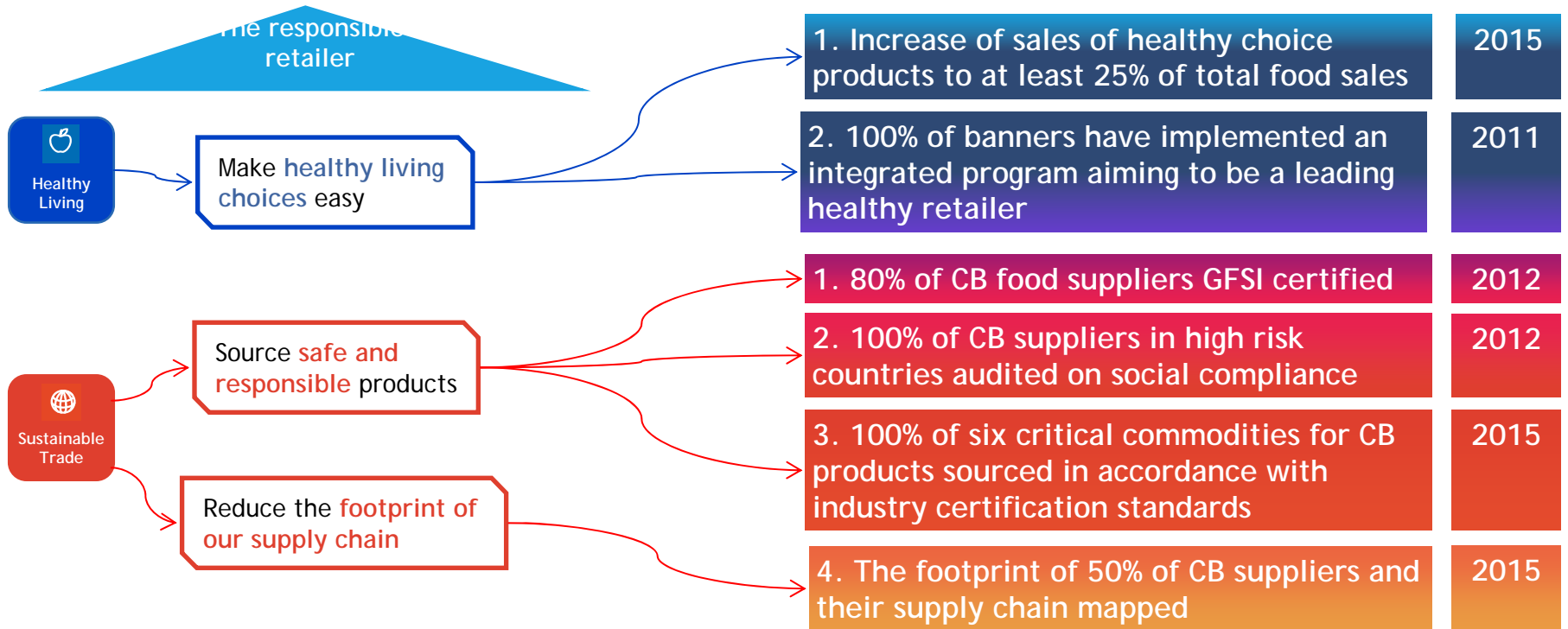
What is Sustainable Seafood?

- **We define sustainable seafood as being wild caught or farmed seafood that is produced while ensuring the longevity of the fishery/aquaculture operation. These operations use production methods that minimize environmental impact and promote positive economic and social growth, in the full understanding that product safety remains key within all considerations.**



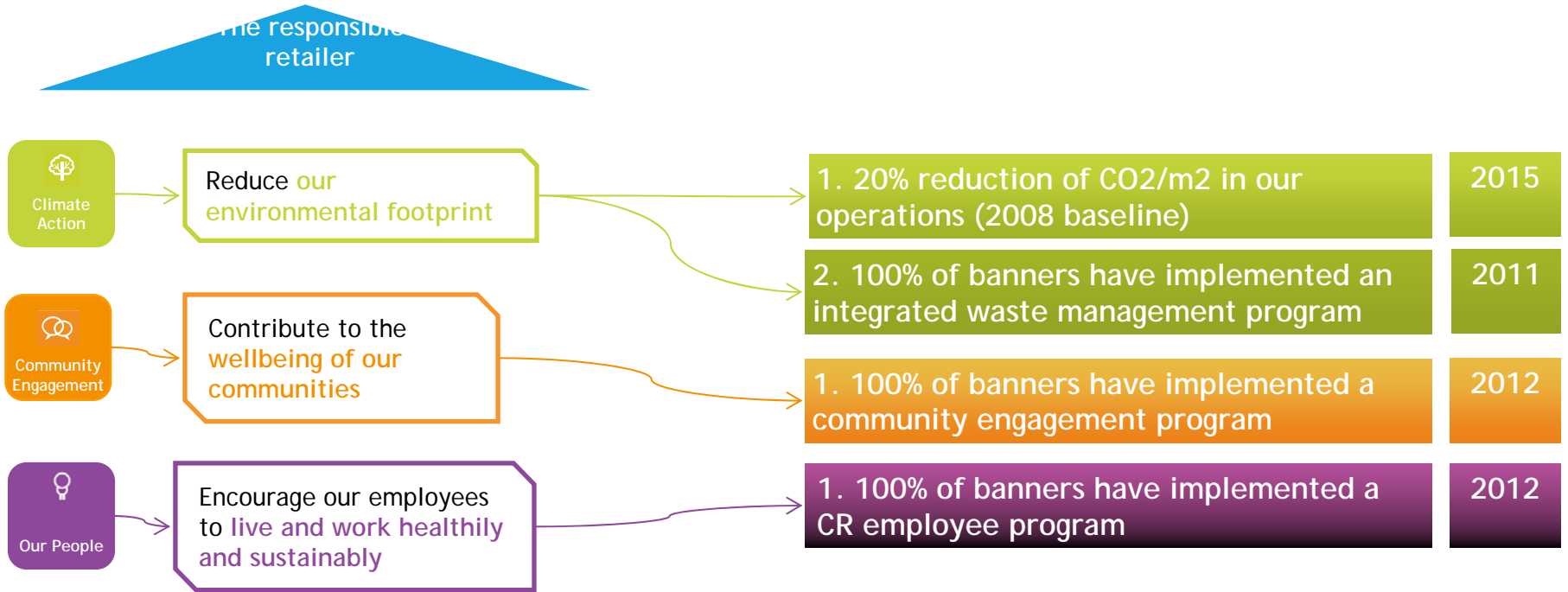
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Educate seafood associates at the stores--Playbook

Seafood Sustainability Program Playbook



Stop&Shop®



Giant®



**New England
Aquarium**

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Educate seafood associates at the stores--Playbook

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Educate seafood associates at the stores--Playbook

Some Actions We Have Taken as a Result of the New England Aquarium's Recommendations

We started frequently advertising previously frozen Pacific long-line caught cod.

Long-line Pacific Cod is a very well managed fishery and has been applauded by the environmental community as being one of the better fisheries out there.

We made the decision to discontinue all Shark, Orange Roughy, and Chilean Sea Bass.

All of these fisheries are in serious trouble and have issues with illegal catches.

Each of these species are long lived, take a long time before they reach the age they can reproduce, and have very few offspring when they do reproduce. These three things make these species more vulnerable than most other species.

We publicly announced our support of the Conservation Alliance for Seafood Solution's Common Vision. www.solutionsforseafood.org

We were one of the first retailers to publicly announce our support.

We are working on all of the steps outlined in the Common Vision.

Commitment-We have a sustainable seafood purchasing policy

Data Collection-We have gone through the vast majority of our seafood assortment and given the New England Aquarium the Latin names for each species and the country of origin. We will be digging into to specific areas where the items are caught/farmed next.

Procurement-We are working to shift our sourcing to better managed areas on individual species and/or better fishing gear or farm sites.

Transparency-We have started talking about our partnership with the New England Aquarium and will be talking more about individual actions we are taking more publicly in the near future.

Education-We are educating ourselves on the issues through our partners at the New England Aquarium and will in turn educate our customers as we talk more about seafood sustainability.

Reform-We are working with our supplier partners to take positive steps toward making their operations more sustainable.

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GIANT® Food Stores - Windows Internet Explorer provided by Ahold USA
 http://www.giantfoodstores.com/shareddev/sharedcontent/OurStores/Departments/Seafood/Choicecatch/

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Our Stores
 Seafood Market
 ChoiceCatch
 Joining Forces
 Wild and Farmed
 Seafood from wild fisheries
 Seafood from aquaculture
 Environmentally responsible seafood
 Seafood sourcing
 What can you do
 Improvement Projects

CHOICECATCH
 PARTNERS IN SMART SEAFOOD CHOICES

New England Aquarium

Providing Our Customers with the Highest Quality Seafood, While Investing in Our World's Natural Resources

We are committed to providing our customers with the highest quality seafood available, while investing in our world's natural resources. As a result of this commitment, we are proud to partner with the New England Aquarium on our ChoiceCatch Program. This partnership helps us find ways to provide seafood that favors marine conservation to ensure that there will be plenty of seafood choices for years to come. By supporting only environmentally responsible and well-managed fisheries and fish farms, our stores provide high quality seafood today, and ensure the same quality commitment for the future. We believe this project expresses our commitment to both our customers and our natural resources.

The ChoiceCatch Program


Officially founded in 2001, ChoiceCatch (formerly known as EcoSound) is a partnership between the New England Aquarium and Ahold USA, Inc. — the parent company to GIANT and our sister companies Stop & Shop and Giant-Landover. As part of this program, the team of marine science and conservation experts at the New England Aquarium provides guidance to GIANT on issues of seafood sustainability and enables GIANT to work proactively with the seafood industry to promote environmental stewardship.

The seafood you eat either comes from wild fisheries or is a product of aquaculture, which means it was raised on a "farm". The New England Aquarium team evaluates the seafood we are purchasing and provides recommendations on which wild-caught and farm-raised seafood sources are the best choices for the well-being of the environment. We then take these recommendations and work with suppliers that can provide us with seafood that is caught or farmed in an environmentally responsible way. The long-term goal is to inspire all fisheries and farms to improve their practices and thus improve the overall environmental responsibility of our seafood supply chain.

As a company, we believe in investing in our existing resources in order to maintain them into the future. We have worked hard to take steps towards more socially and environmentally responsible procurement practices. We still have a long way to go, but we know we are on the right path. To further advance our commitment to this work, in May of 2008 we made a commitment to support the Common Vision for Environmentally Responsible Seafood (for more information, see www.solutionsforseafood.org.)

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Tilapia

A Healthy Seafood Choice

Common Name: Tilapia

Scientific Name: *Oreochromis spp.*

Availability: Year-round

About Tilapia

Tilapia is a firm, flaky white fish with a mild taste, well suited to any recipe requiring white fish. It's also a great environmental choice. Originally from Africa, tilapia are currently farmed in over 50 countries that produce around 1.5 million tons each year globally. Depicted as a food fish in ancient Egyptian hieroglyphics, tilapia has been farmed for 2,500 years.

Farming Methods

Modern production most often occurs in ponds, but other methods include raceways, floating cages and large indoor tanks. Seafood farmers like to raise tilapia because they are hardy and fast growing, reaching market size in around six months.

Country of Origin

Currently the tilapia we sell in our stores comes from Ecuador.

Management

Tilapia farms in Ecuador are regulated by the government under the jurisdiction of the Under Secretariat for Fishery Resources. Farms are required to obtain an environmental license, for which they must undertake an Environmental Impact Assessment (EIA). The EIA looks at environmental, social and cultural changes that would be caused by the farms' actions. The results are used to develop a farm specific Environmental Action Plan, which is geared towards reducing or eliminating these impacts. Farms are monitored based on the Environmental Action Plan to ensure that impacts are not excessive.

Conservation Notes

Tilapia is a good choice for the environment because they are fed a mostly vegetarian diet, which reduces the need to harvest wild fish to feed them. This is becoming increasingly important as wild fish populations are decreasing. In some small-scale farms, tilapia eat only the algae and plankton that naturally grow in the pond. By controlling feed and inputs into the environment, farmers are able to produce a healthy, great tasting fish. As a whole, tilapia farms have few environmental impacts making them an ocean-friendly seafood choice.

Information provided by  www.neaq.org



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Investing in our future.

We have partnered with the New England Aquarium to make smart seafood choices for the future.



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Our seafood is a smart choice

- Quality and freshness 100% guaranteed.
- A flavorful part of a heart-healthy diet.
- We're a leader in environmentally friendly buying practices.
- New England Aquarium research scientists help us evaluate what seafood we buy and where we buy it from.



For more information and recipes, visit giantfood.com



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Smart, Sustainable Seafood

We know you want to make the best seafood choices. So do we. That's why we partner with the New England Aquarium to help ensure that there will be plenty of ocean-friendly seafood for years to come. It's a choice you can feel good about every day.



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Ahold USA



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Who is Raleys?

- Privately owned retailer based in Northern California
- Operate 128 stores in Northern California and Nevada under four store banners
 - Raleys
 - Bel Air
 - Nob Hill
 - Food Source



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Who are we?

- Stores in Northern California and Nevada



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Raleys Sustainability Initiatives

- 1995 developed program to recycle as much waste as possible.
 - Currently more than 680 tons of waste per store have been diverted from landfills and been recycled
 - 60% of all waste is recycled
 - Produce and other edibles hauled back to our DC and made available to local farmers and ranchers which reduces our waste flow by 25%



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Raleys Sustainable Initiatives

- Member of US EPA GreenChill Advanced Refrigeration Partnership
- 95% of refrigeration systems have been changed or upgraded to reduce energy loss
- 2008 installed 1,576 solar panels, providing about 300,000 kilowatts of power each year.



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Raleys Seafood Sustainability

- Internal Seafood Sustainability Policy
- All stores are MSC chain of custody certified
- All Farmed Shrimp, Tilapia, Pangasius are BAP 2 star minimum certified
- Private label 'Full Circle' products majority either MSC or BAP certified
- Partnership with SFP



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How did we get started?

- One of the original members of the FMI Sustainability Seafood Working Group
- Engaged with MSC and GAA early on
- Obtained MSC Chain of Custody Certification in 2010
- Continue to evaluate our current programs, and supply chain for continuous improvement



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Employee and Customer Education

- First had to educate and sell upper management on this was the right thing to do.
 - What will it cost us?
 - Will it increase sales?
 - Will it be a point of difference for us?
 - If not why would we want to do this!!



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Employee Education

- Meetings and Workshops with all meat supervisors and managers
- MSC Chain of Custody Certification training
- Third party audits of MSC Chain of Custody
- Educational information sent to stores regularly.



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Hook, Line and Sinkers

This week I had a customer contact us upset that we were selling farmed shrimp from Thailand. She had heard that the conditions there were terrible, and felt that we should not be selling shrimp from there

It got me wondering how her concern would have been addressed at store level; I explained to her that all of the farmed shrimp we carry is Best Aquaculture Practices (BAP) certified I have talked here and in our merchandising bulletin about BAP, but I don't know if I have done a good enough job of explaining what that means, so I will try and do that here and next week

BAP is run by the Global Aquaculture Alliance and its standards used to evaluate farmed seafood items from the hatchery through processing.

- Currently Shrimp, pangasius (swai), catfish, tilapia and recently salmon are all being certified
- There are four levels of certification, hatchery, farm, processing and feed mill
 - Each different area is evaluated alone and each one is certified individually
 - Each successful certification is granted a star. So certified products can be from one star to four stars certified. The more the better, it is easy to get a processing plant certified, harder for the other three areas.
- Audits are conducted by third party independent auditors to determine if each area is meeting the set standards.

I will discuss next week what those standards are and why we only carry BAP certified shrimp.



FMI



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THE VOICE OF FOOD RETAIL

Feeding Families  Enriching Lives

Customer Education

- Informational brochure at all seafood counters
- Print advertising
 - Both weekly ad and newspaper ROP
- Raleys Web Site
- Employee engagement with consumers



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Thank You.



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