



Sustainable Poultry Production: a retailer perspective

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Morrisons - 4th biggest UK Supermarket...



Foodmaker & Shopkeepers

- We **make over half** of the fresh food we sell
- Market Street make fresh food daily
- Fresh food is made in our **manufacturing sites**
- Digital production lines increase productivity, efficiency and reduce waste



Customers

Around 11 million customer transactions every week



Colleagues

100,000 friendly and skilled colleagues, supported by a high quality management team

...the UK's largest fresh food manufacturer



- 20 factories
- 9,000 colleagues
- Operating 363 days per year
- First site opened in 1980
- Recently acquired Lowlands Plant Site and Falfish Fisheries
- UK farming's biggest direct supermarket customer

Our Core Purpose



To make and provide
food we're all proud of
where everyone's effort is worthwhile
so more and more people
can afford to enjoy eating well.

Sustainability in supermarket retail

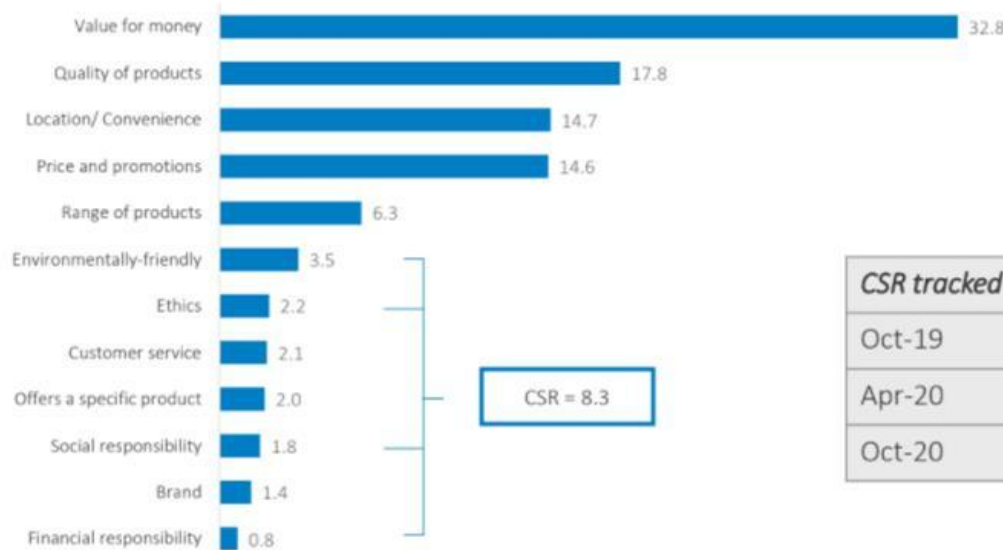
Context - supermarket retail has its own challenges

- 12,000 + products & each has its own story
- 2,500 suppliers
- 100,000 + raw materials

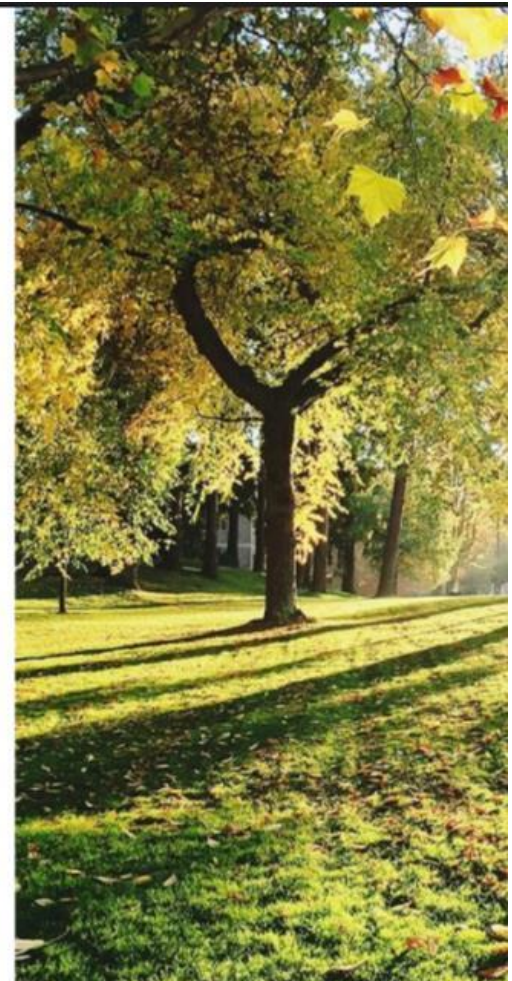
FACTORS WHEN CHOOSING A SUPERMARKET

Value for money and quality of the products are the top priorities for consumers when choosing a Supermarket. Although CSR metrics rank lower down, they could be used as a point of differentiation.

Importance of factors when choosing a Supermarket



CSR tracked	
Oct-19	7.6
Apr-20	6.2
Oct-20	8.3



What our customers tell us...our survey



Rank	2021/22	2020/21	2019/20	2018/19
1	Ensuring food safety	Ensuring food safety	Ensuring food safety	Ensuring food safety
2	Supporting British farmers	Supporting British farmers	Reducing plastic packaging	Reducing plastic packaging
3	Selling affordable food	Selling affordable food	Supporting British farmers	Supporting British farmers
4	Reducing plastic packaging	Providing good employment, pay and conditions	Reducing packaging waste	Ensuring animal welfare
5	Providing good employment, pay and conditions	Reducing plastic packaging	Ensuring animal welfare	Selling British products
6	Reducing food waste	Improving the recyclability of packaging and products	Reducing food waste	Reducing packaging waste
7	Improving the recyclability of packaging and products	Ensuring animal welfare	Protecting natural habitats, woodlands and forests	Trading fairly with suppliers
8	Selling British products	Reducing food waste	Selling British products	Reducing food waste
9	Ensuring animal welfare	Selling British products	Addressing climate change	Selling locally sourced products
10	Reducing packaging waste	Reducing packaging waste	Tackling modern slavery and human trafficking	Providing good employment, pay and conditions

Sustain Business Strategy



Ambition

- **Sustainable growth** with a lower environmental impact
- Play our full part **supporting the communities** we serve and the lives of our colleagues



2030: growing great British food with farmers who care



Nature positive farming which cares for the world around us

Net Zero UK Agriculture by 2030

Soil health, tree planting and wildflower schemes to improve the lives of birds, bees and insects

Sustainably sourced feedstock

Great stockmanship to ensure content, well cared for animals

Training and skills programmes to promote great stockmanship and care (zero tolerance of harmful welfare)

Innovation and attention to detail driving taste and quality

Excellent welfare and environmental standards

Variety and breed development for improved welfare, taste and quality

Building connections between farmers and customers to improve understanding and pride in what we do

Customer and colleague connections with visits online stories, blogs, #Farm 24

Next Generation, mentoring and Apprenticeship schemes

Sustainable growth of high quality British food from farms we know and trust

Welfare: laying hens

- 100% free range in all shell eggs
- Well on our way to meeting 100% cage-free ingredient egg by 2025
- Projects:
 - increasing additional enrichment
 - understanding how to reduce the need to beak trim
- British Laying Hen Academy



Welfare: broiler birds

- ~80% of fresh poultry, is already in-house hatched, aim = 100% by 2025
- Additional welfare and stockmanship measures in place
- Projects:
 - Hubbard Redbro - launched
 - Improving catching protocols
 - Stockmanship and training
- Use of technology - 365 observations



Space to Roam launched

6 products in Space To Roam Chicken

Favourites first

NEW

NEW



LIFE 4d+

Morrisons Space To Roam
Chicken Thigh Fillets

600g

£3.99

£6.65 per kg

Add to trolley

NEW



LIFE 4d+

Morrisons Space To Roam
Med...

1.45kg

£4.99

£3.44 per kg

Add to trolley

NEW



LIFE 4d+

Morrisons Space To Roam
Large Chicken Wholebird

1.75kg

£5.99

£3.42 per kg

Add to trolley

NEW



LIFE 4d+

Morrisons Space To Roam
Chicken Fillets

600g

£6.49

£10.82 per kg

Add to trolley

NEW



LIFE 4d+

Morrisons Space To Roam
Chicken Drumsticks

1kg

£2.99

£2.99 per kg

Add to trolley

NEW



LIFE 4d

Morrisons Space To Roam

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Reducing emissions is also (mainly) about reducing costs: buy less, waste less, use more
Sequestration can involve more cost, so important to lower emissions as priority #1

The scale of the challenge

If we didn't reduce emissions, but just planted trees to offset the CO2e emissions, we'd need to plant around 8.5million trees every year to offset our direct Ag supply (NB - there are ~3bn trees in the whole of the UK).

That's not what we want to do.

The approach to the challenge

1

Stimulate and support innovation

Seaweed for cattle
Insects to reduce soya
Hydrogen for tractor fuel

2

Measure supplying farms and set action plans

Emissions and sequestration
'So what next' action plans

3

Inspire, educate and inform
School of Sustainable Food and Farming
Training workshops
Blueprint and project farms
'Treescapes' project

Environment



It's more than Net Zero

Water

Biodiversity

Economic

Challenging times - for consumers
and for farmers

Working hard with our grower base -
no easy solutions, but long term
business viability is the shared goal

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MARKETS
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Thank you