

Bill Mustoe

Oxford Farming Conference 2013



first milk



2014

2015



Sainsbury's

Sainsbury's



MORRISONS



TESCO

Every little helps



Waitrose
Brand Price Match







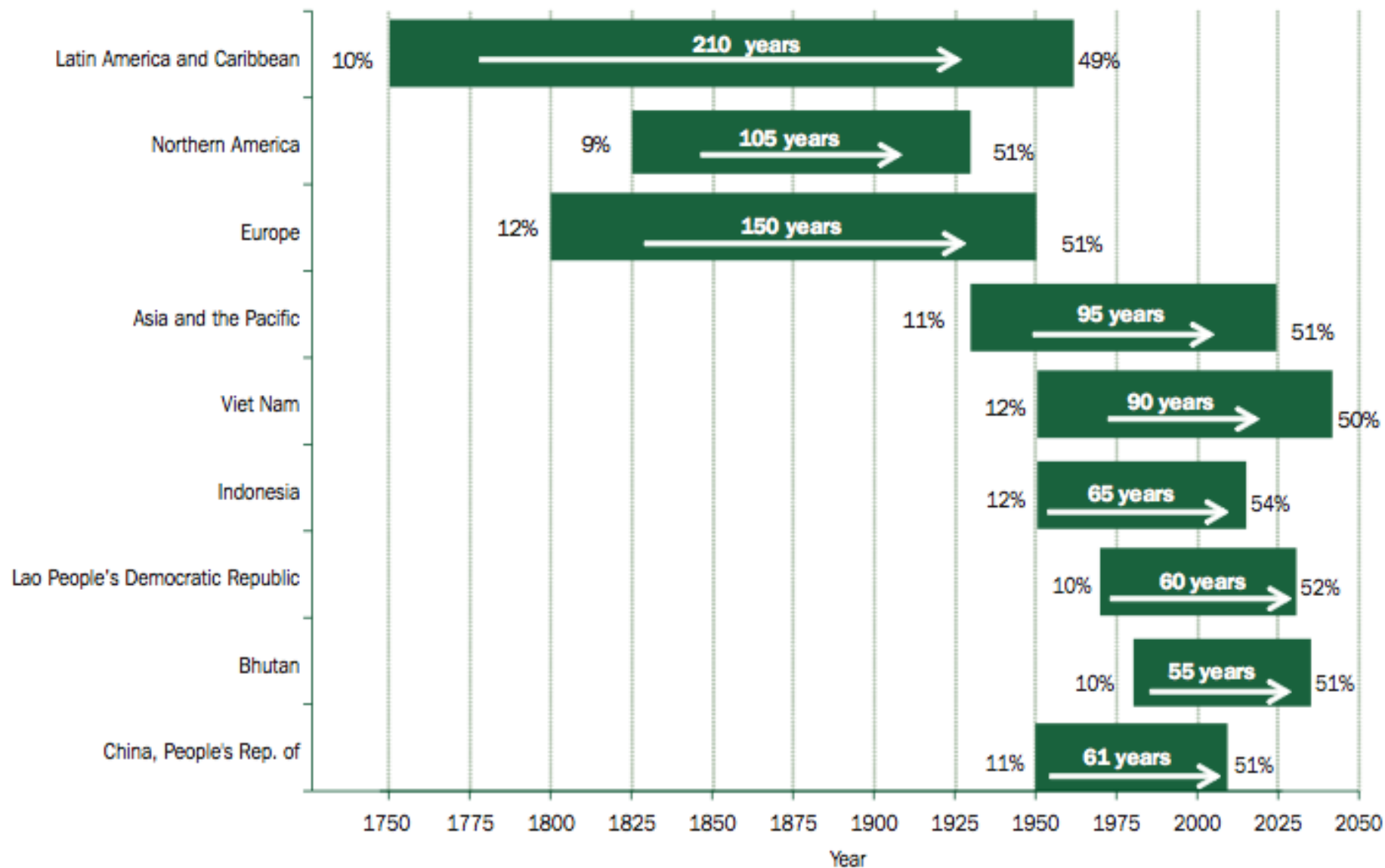
signal







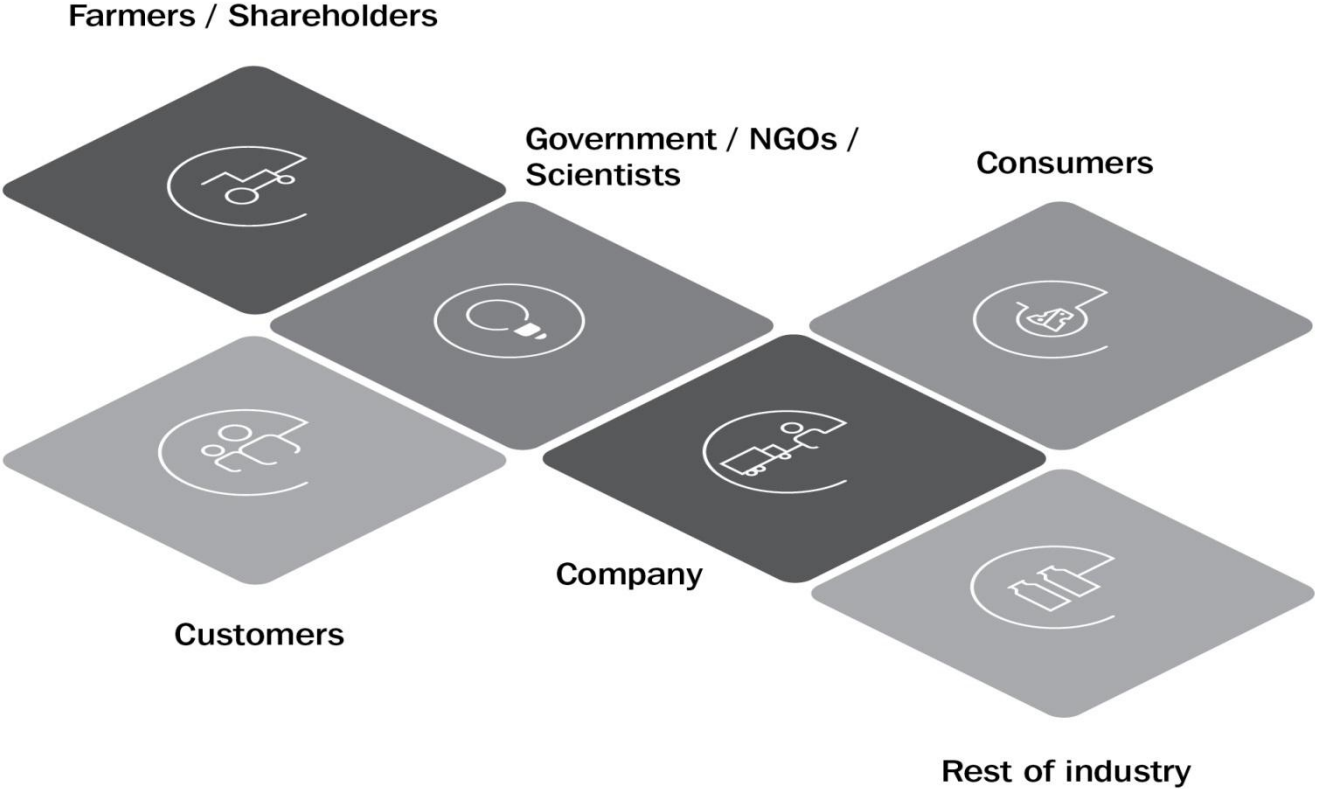
Figure 1 Number of Years from about 10% to 50% Urbanization



Notes: Extrapolation and interpolation were used to estimate urbanization level and corresponding starting years for Latin America and Caribbean and Northern America.
 Source: ADB estimates based on Bairoch (2008) and UN (2012).



stakeholders



Our Programme

Feed for the Future
Sustainable rations



Cow and Calf
Long lived healthiest cows
producing viable calves



Wheels, Yields and Deals
Efficient logistics and rewarding
farmers for sustainable practices



Reduce, Renew, Recycle
Moving to all renewable energy



Food for the Future
Zero waste dairy company



Each of our 5 programme areas are led by a member of our Operations Board or a senior manager in the business. We deliberately chose not to have a Sustainability Team to lead this work, but rather we spread responsibility and accountability to ensure that it's an integral part of everyone's day job.



collaboration
is everything



**Fruit and
vegetables**

**Bread, rice,
potatoes, pasta
and other starchy foods**

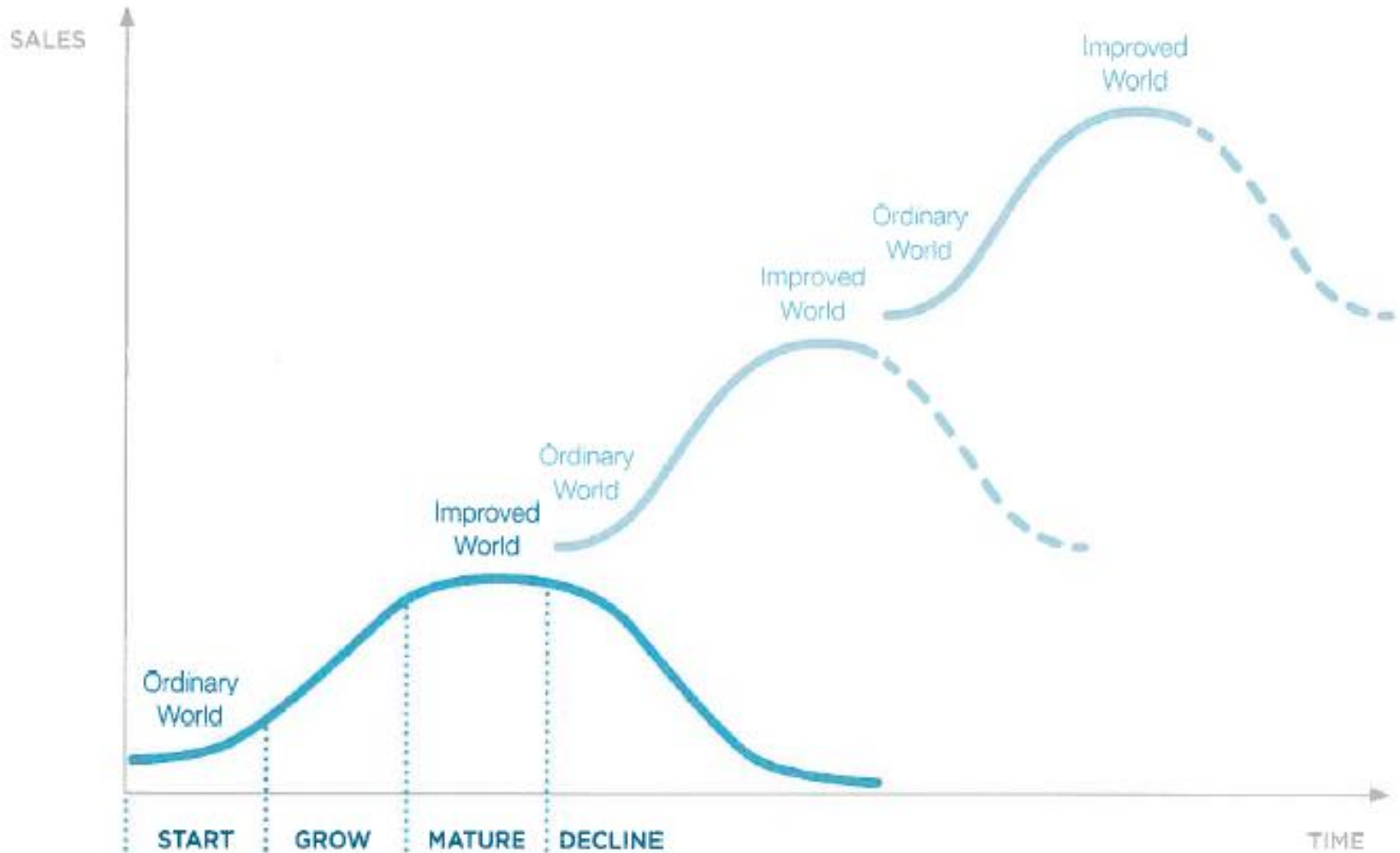


**Meat, fish,
eggs, beans
and other non-dairy
sources of protein**

**Milk and
dairy foods**

**Food and drinks
high in fat and/or sugar**

Business Transformation



OOPS...
THERE GOES
THE COMPANY

THIS IS
OUR SIT-BACK-
AND-DO-NOTHING
SCENARIO!

