



Oxford Farming Conference

Optimising the best that
nature has to offer

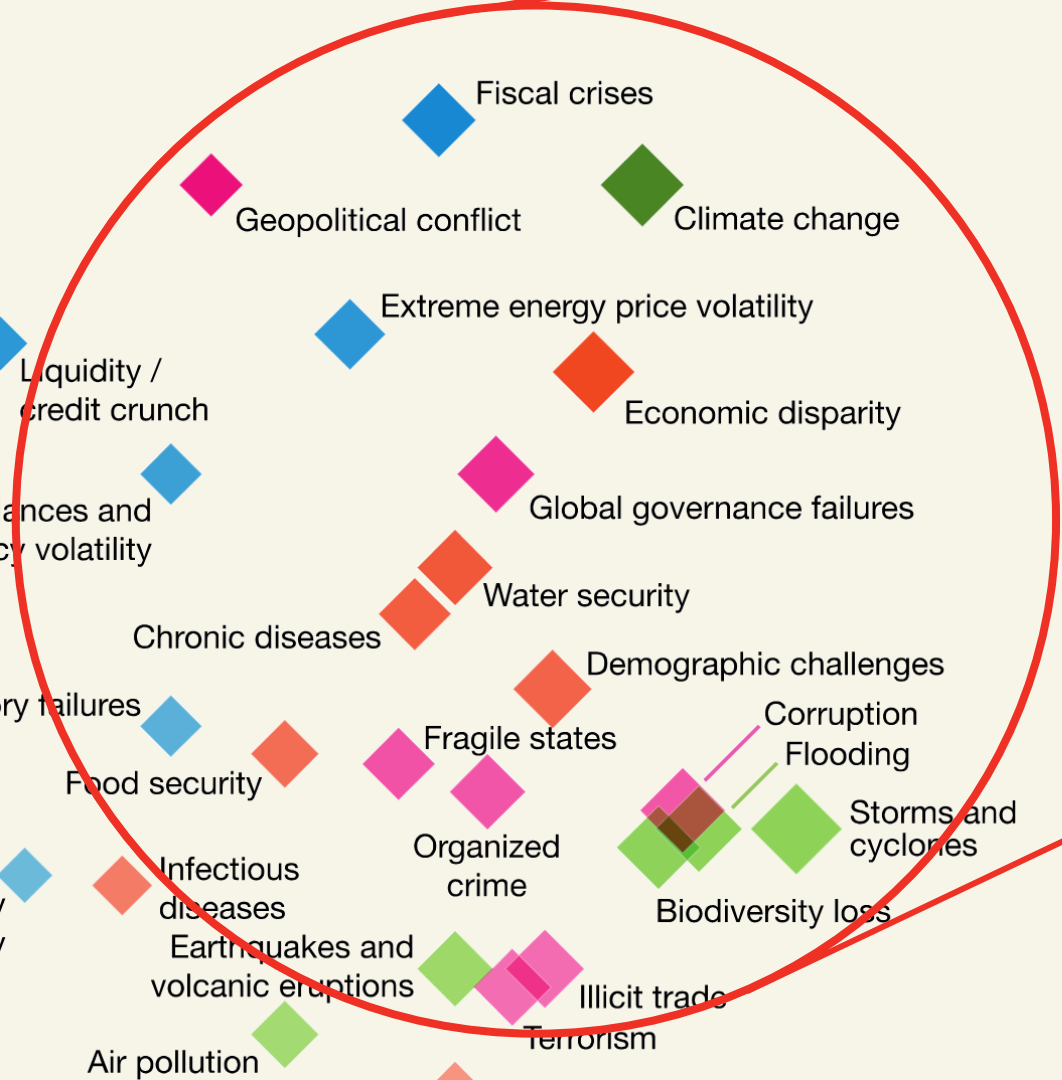
Judith Batchelar OBE

Director of Sainsbury's Brand

Co-Chair AgriTech Leadership Council

Sainsbury's
live well. for less

World Economic Forum Risk Report 2015: 10 Year Outlook



Challenge

Tackling global hunger and malnutrition

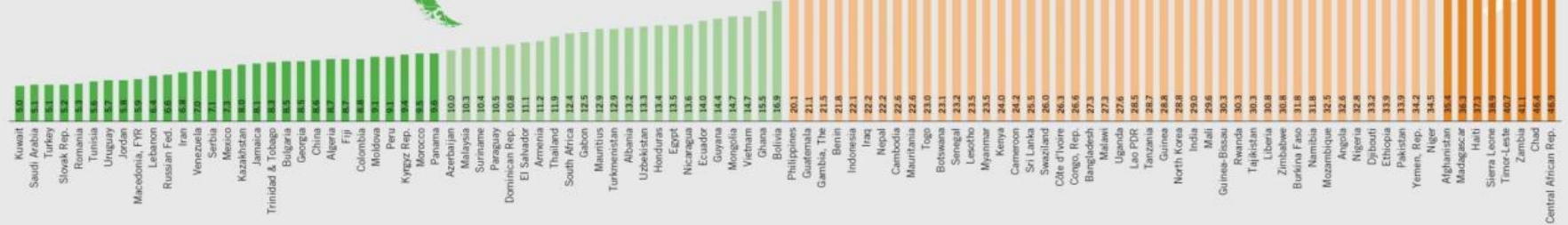
2015 GLOBAL HUNGER INDEX BY SEVERITY

- Extremely alarming 50 ≤
- Alarming 35.0-49.9
- Serious 20.0-34.9
- Moderate 10.0-19.9
- Low ≤ 9.9
- No data
- Industrialized countries

Note: For the 2015 GHI, data on the proportion of undernourished are projections for 2014-2016, data on child stunting and wasting are for the latest year in the period 2010-2014 for which data are available, and data on child mortality are for 2013. GHI scores were not calculated for countries for which data were not available and for certain countries with small populations. Currently no countries fall in the extremely alarming category. Unfortunately up-to-date data are lacking for several countries, including Burundi, Comoros, and Eritrea, which appeared in that category in at least one of the past two GHI reports.

The boundaries and names shown and the designation used on this map do not imply official endorsement or acceptance by the International Food Policy Research Institute (IFPRI), Washington, DC, or Concern Worldwide.

Recommended citation: "Figure 2.4. 2015 Global Hunger Index by Severity" Map in 2015 Global Hunger Index: Annual Update and the Challenge of Hunger, by F. van de Steeg, J. Bernstein, A. de Haan, K. Prasad, S. Yu, and Y. Yin, 2015. Bonn, Washington, DC, and Dublin, Washington, International Food Policy Research Institute, and Concern Worldwide.



The challenge closer to home

Food relative to disposable income has never been cheaper

People are eating out of home more

Customers are eating from a more limited repertoire of foods

The life skills to know how to feed yourself and your family nutritiously and well are not being taught in school

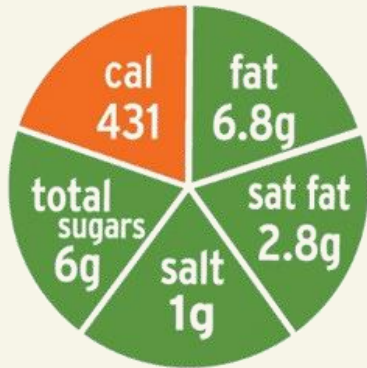
Food intolerances and allergies are on the increase

Obesity and diet related chronic diseases are a huge issue for the nation

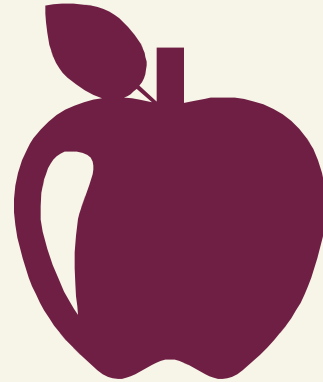
Most progress on health has been through stealth rather than real behavioural change



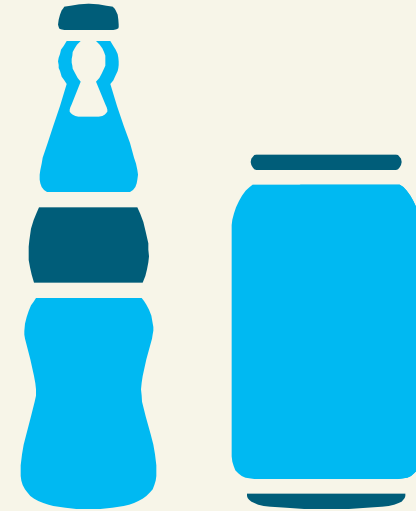
At Sainsbury's we plan our interventions where they matter most and where they will have the greatest impact



Information Education
Food labelling



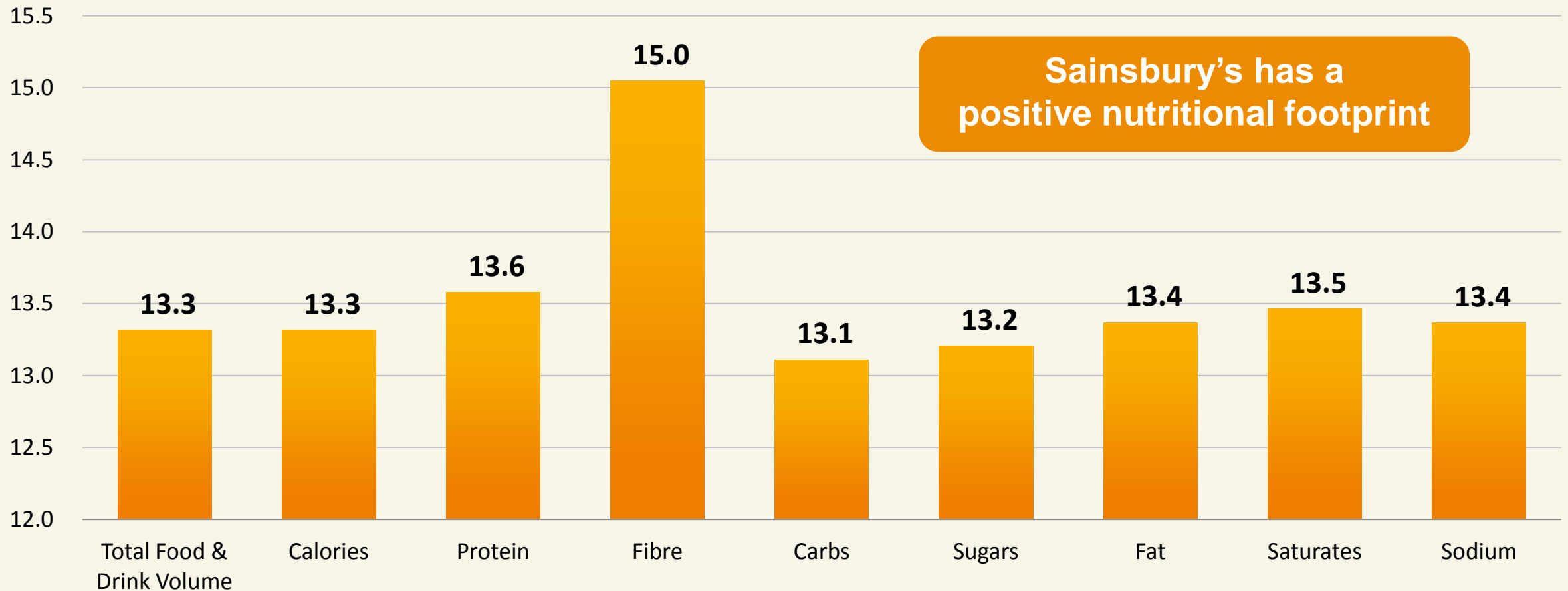
Getting the most
of your 5 a day



Reformulation

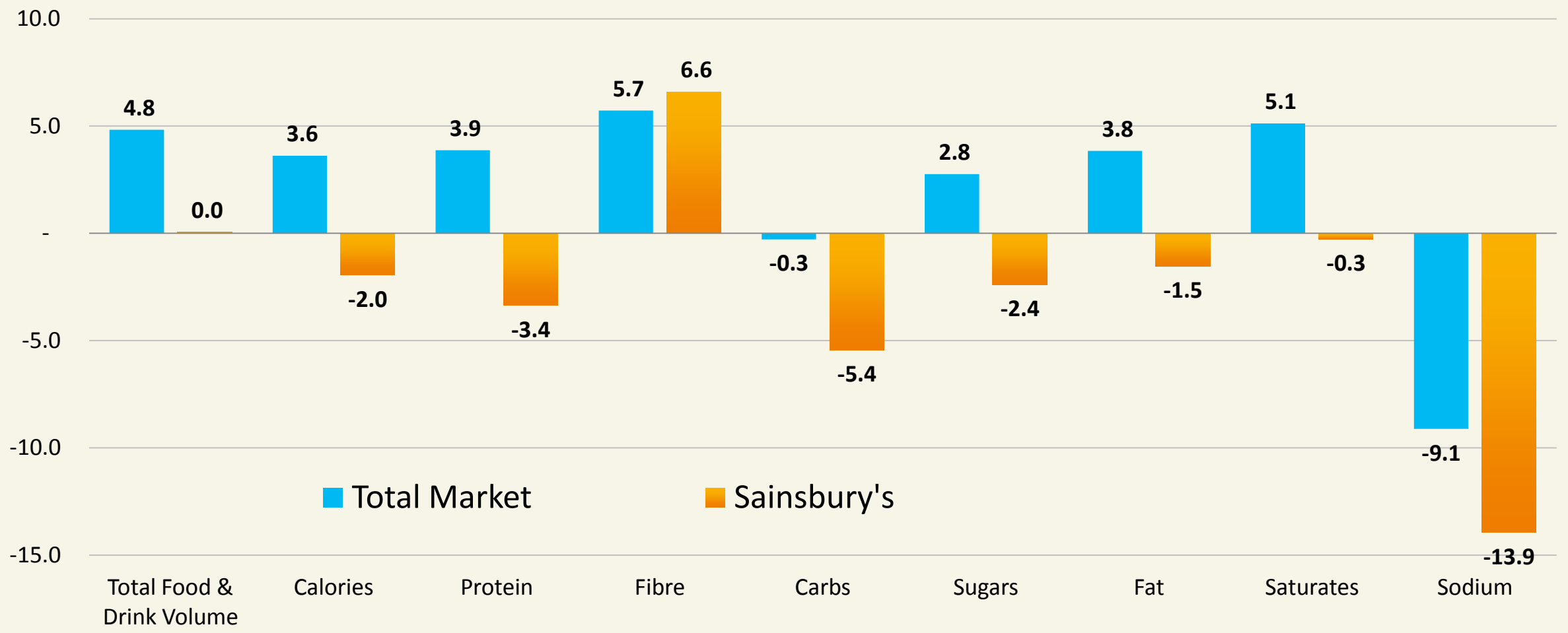
How are we doing? Sainsbury's market share by nutrient

Sainsbury's % share of take home food & drink nutrients, 52 w/e 13 Sept 2015



5 year performance – Sainsbury's versus total market

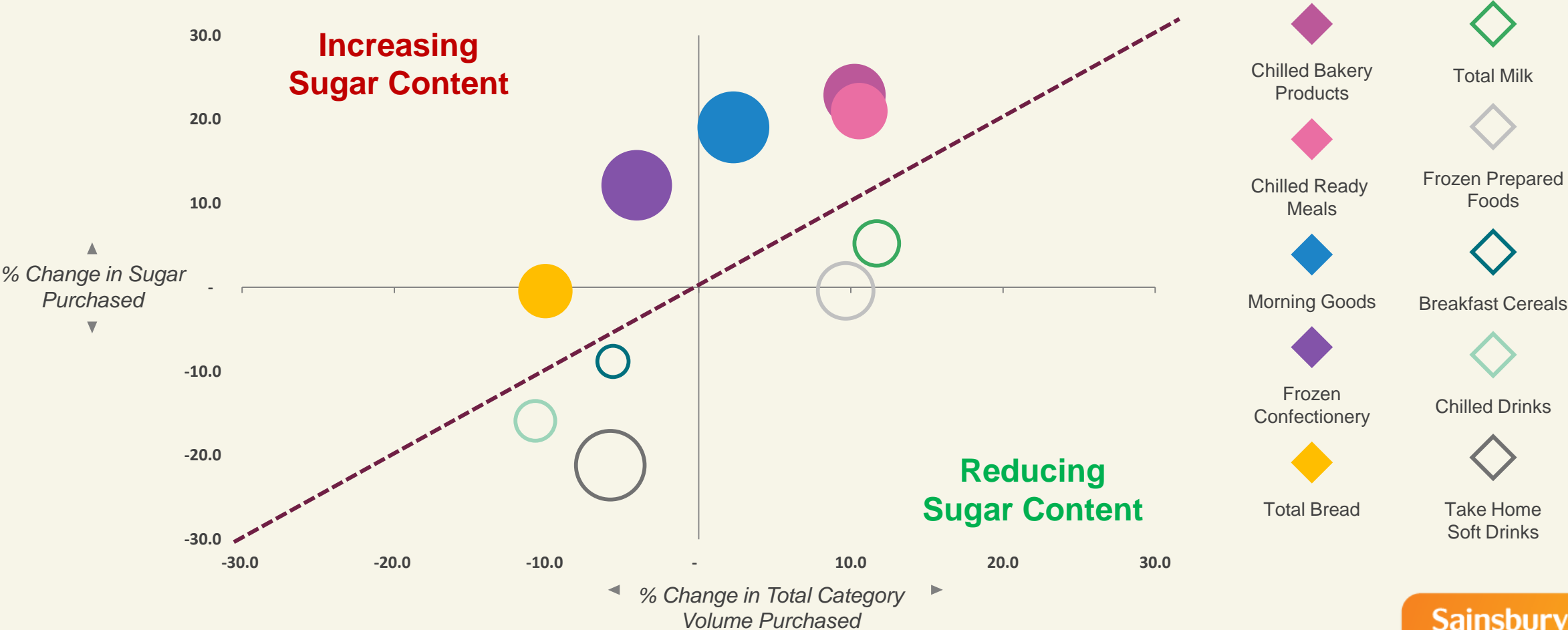
% change in purchasing levels of take home food & drink nutrients, 2015 vs. 2011



Source: Kantar Worldpanel, 52 w/e 13 September 2015 vs. September 2011

In Sainsbury's soft drinks has been the big success story but there is more to do across the rest of the range

Sainsbury's % Change in Purchasing levels of Sugar, 2015 vs. 2011



Source: Kantar Worldpanel, 52 w/e 13 September 2015 vs. September 2011



It's not just about reformulation.....

There are limits to how much we can reformulate products to remove salt, sugar and saturated fat

It's not just about taking things out but about putting things in

Agriculture can and needs to deliver better nutrition across crops, dairy and livestock

And in the broader sense of "Health" this is important because...



Soil health



Plant health



Animal health



Human health

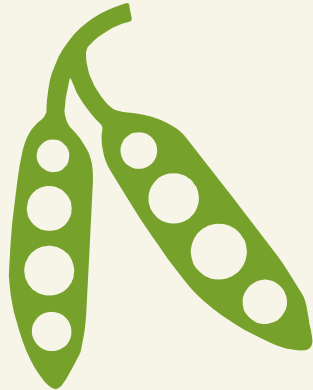
...all are inextricably linked

It's not only about the macronutrients we mustn't forget the important micronutrients too

United Nations Global micronutrient deficiencies Iron / Zinc / Vitamin A
- the opportunity of bio-fortification



HarvestPlus
Better Crops • Better Nutrition



Iron - Beans
Central Africa and
Central / South America



Zinc - Wheat
Asia



Vitamin A - Maize
Zambia

By 2030 1 billion people benefitting from bio-fortified nutritious foods

Health an opportunity for UK agriculture

Reduced Saturated Fat



Feed development

Increased Iron and fibre



Plant breeding - varieties

Increased Magnesium,
Potassium and Selenium



Soil / nutrition management

Health an opportunity for UK agriculture

Sainsbury's eggs

Omega 3 eggs are not new

Linseed added to feed to achieve at least 120mg DHA per 100g edible portion

Palatability affected impacting feed intakes; and productivity levels

Trialled Omega 3 Algae ration from Alltech giving better palatability. Delivering the same DHA levels

Improved palatability, feed intakes and productivity



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Health an opportunity for UK agriculture

Sainsbury's Scottish farmed salmon

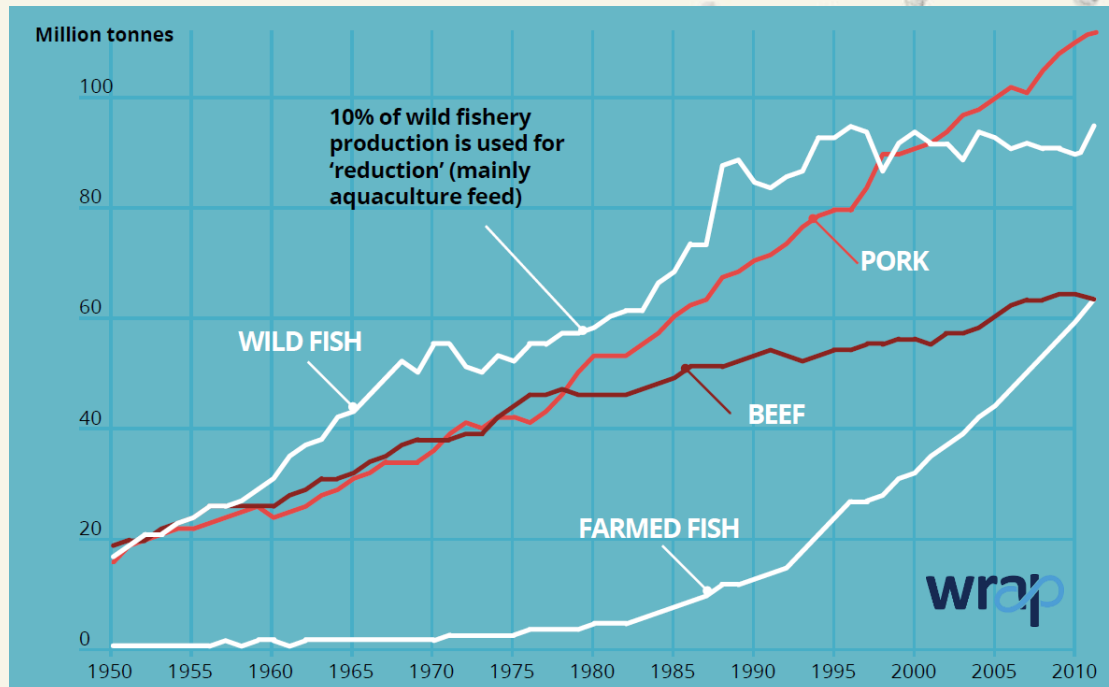
One portion (120g) of Sainsbury's responsibly sourced farmed salmon is high in Omega 3

Achieved through feed formulated to our requirements

Other nutritional elements such as total fat, saturated fat and vitamin E are included in the finished product specification – as well as taste!

Identify and develop new sources of protein and omega 3

- Bacterial protein
- Polychaete worms
- Omega 3 from microalgal sources
- Long chain omega 3 from plant sources



In summary

**We know where
interventions will have
most impact**

**The reformulation of
products will produce
diminishing returns
over time**

**There is an opportunity
and a need for
agriculture to deliver
health benefits in the
broadest sense**

We have the ability to do this now...

A group of people, likely a family, are standing on a dirt path. They are wearing outdoor clothing, including jackets, jeans, and rubber boots. One person is holding a metal bucket. The background is a natural, outdoor setting with trees and grass.

Thank you

Sainsbury's
live well. for less