

Carrefour

**Carrefour
Fish market, Consumers &
Sustainability**



Barcelona 14/10/2011



Our identity: discovering Carrefour

Carrefour group in key figures

MARKET POSITION

N°1 **N°2**
in Europe worldwide

SALES (PRO FORMA 2010)

90 billion €



EBITDA (PRO FORMA 2010)

4,411 m€



FREE CASH FLOW (PRO FORMA 2010)

1,230 m€



OPERATIONS

32
countries
(18 integrated countries)

EMPLOYEES

411,000
colleagues worldwide



STORES

9,564 stores
(incl. franchisees)





Our identity: discovering Carrefour

An international group

9,564 stores in **32** countries



France

4,558 stores



Europe (excl. France)

4,107 stores



Latin America

529 stores



Asia

370 stores





Our identity: discovering Carrefour

A complementary multi-format retailer

Hypermarket

Carrefour 
planet

Carrefour 



Supermarket

Carrefour 
market



Convenience

Carrefour 
express

Carrefour 
express

Carrefour 
city

Carrefour 
contact



Cash & Carry

 **ATACADAÓ**

Pronocash





Our ambition: becoming the preferred retailer

OUR AMBITION

to become the preferred retailer



OUR DREAM

To be recognized and loved
for helping our customers and consumers
enjoy better quality lives every day



OUR VALUES

Committed, caring, positive





Our commitment: developing a fair and sustainable trade

Sustainable development is at the heart of Carrefour's strategy

Two key areas:

- Including sustainable development in the management of our activities and business
- Promoting sustainable development among customers in our stores and by our products

A Sustainable Development pioneer almost 20 years ago:





Fish products: sustainable trade

Fisheries Global situation



32 % over exploited
50 % maximum



Traceability
IUU, Wastage

Aquaculture is over
50 % volume but !

Minimum size &
maturity ?

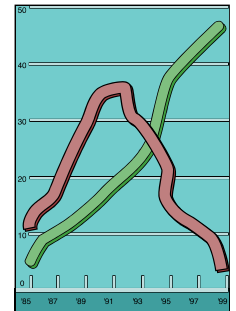
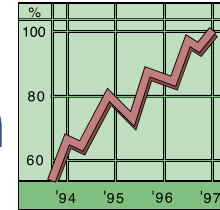
Transparency ?
Accountability ?

Global warming
Pollution



Fish products: sustainable trade

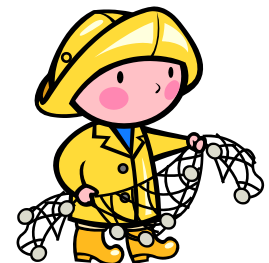
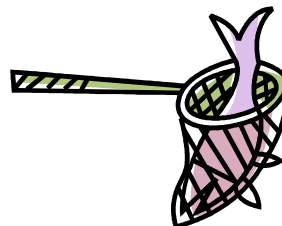
Fish planet: Social Global situation



120 millions people directly dependant on fishing for their income (97% live in developing countries)

200 millions people are employed in fishing and post-harvest industries

In the world, some are thinking since 1970 the number of people fishing has more than tripled





Fish products: sustainable trade

NGO'S actions

A-N-E Atlantique Nord-Est
GG Golfe de Gascogne
M Manche
MN Mer du Nord
A-N Atlantique Nord

A privilégier
Sous conditions (se reporter aux guides)
A éviter
Certifié MSC

| | WWF France (2007) | Greenpeace France (2009) | MCS (2009) | Nausicaa Nausicaa (2007) | MSC (2009) |
|---------------------------|-------------------|--------------------------|---------------------------|--------------------------|-------------------------|
| Anguille | Europe | | | | |
| Araignée | GG/NA | | | | |
| Bar de Chalut | A-N-E | | Pélagique | | |
| Bar de ligne | GG/NA | | | | |
| Cabillaud de l'Atlantique | A-N-E | | A-N-E | | HEPSC |
| Cabillaud du Pacifique | Pacifique Nord | | | | Arctique Nord Est |
| Calamar | A-N-E | | | | |
| Chinchard | A-N-E | | | | |
| Colin d'Alaska | Pacifique Nord | | | | |
| Coque | | | | | Burry Inlet |
| Coquille | Divers | | Ptongée | | |
| St Jacques | M/MH | | | | |
| Crevette grise | | | | | |
| Crevette Hordique | | | Arctique HE | | Canada Golfe St Laurent |
| Crevette tropicale | Divers | | | | |
| Dorade grise | Ligne | | | | |
| Dorade rose | A-N-E | | | | |
| Dorade royale | Divers | | | | |
| Eglefin | A-N-E | | mer du Nord | | Arctique Nord Est |
| Empereur | A-N-E | | | | |
| Espadon | Divers | | | | |
| Flétan de l'Atlantique | A-N | | | | |
| Flétan du Groenland | A-N | | | | |
| Grenadier | A-N-E | | | | |
| Hareng | HE | | Tamise mer du Nord | | Tamise mer du Nord |
| Homard européen | GG/NA | | | | |
| Julienne | A-N-E | | | | |
| Langoustine | A-N-E | | Ouest Ecosse mer du Nord | | Loch Torridon Hébrides |
| Lieu jaune | De ligne | | Comsuaile anglaise | | |
| Lieu noir | mer du Nord | | | | mer du Nord |
| Limande | | | | | |
| Lingue bleue | A-N-E | | | | |
| Lotte | A-N-E | | | | |
| Loup de mer | Divers | | | | |
| Maquereau | A-N-E | | A-N-E | | Hastings |
| Merlan | Manche | | | | |
| Merlu blanc du Cap | Afrique du Sud | | | | |
| Merlu européen | A-N-E | | Atlantique Stock du Nord | | |
| Pangas | Asie | | | | |
| Perche du Nil | Afrique | | | | |
| Pétoncle | Patagonie | | | | Argentine |
| Pilte/carrelet | A-N-E | | mer d'Irlande mer du Nord | | mer du Nord |
| Poulpe | Divers | | | | |
| Rafes | | | | | |
| Régulus | | | | | |
| Rouget Barbot | GG | | A-N-E | A-N-E | |
| Sabre | A-N-E | | | | |
| Saint Pierre | A-N-E | | | | |
| Sardine | A-N-E | | | | |
| Saumon de l'Atlantique | | | | | |
| Saumons du Pacifique | | | | | |
| Sébaste | A-N | | | | |
| Seiche | A-N-E | | | | |
| Tacaud | GG/NA | | | | |
| Thon albacore | | | | | |
| Thon germon | Ligne | | Atlantique Nord | | Pacifique |
| Thon rouge | | | | | |
| Tilapia | | | | | |
| Tourteau | GG/NA | | Caster | | |
| Turbot | A-N-E | | | | |

www.mardefme-seafood.com - 15 octobre 2009



pour une planète vivante

ET TA MER
T'Y PENSES?
guide à l'usage
du consommateur responsable



GREENPEACE



Actions on big players



Ces classements varient en fonction de la méthodologie retenue et des années d'observations.
Le classement Nausicaa est régional et saisonnier.
Le classement MCS est le plus complet de tous. Dans le cas de plusieurs classements pour une même espèce, en fonction du stock, ne sont rapportées ici que les qualifications les plus favorables. Pour l'ensemble des appréciations vous reporter à www.fishonline.org



Fish products: sustainable trade

>150 000
T/Y IN F

Our context



Committed

Consumers

Social

Price

Preferred

NGO'S

Quality

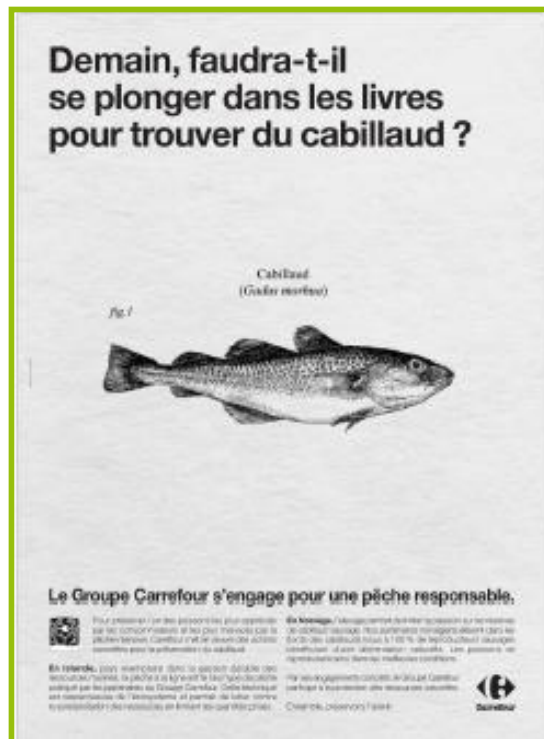
Trustable





Fish products: sustainable trade

Our Carrefour Products carry our values



To Delight our consumers every day



Fish products: sustainable trade



Delight our consumers every day

Source CREDOC 2009 french consumers

20 % are afraid of the environmental degradation

Who should take care of environment ?

79 % industrial

67 % retailers

65 % farmers

$16 \% + 48 \% = 64 \%$

Take care of environment

New paradigm

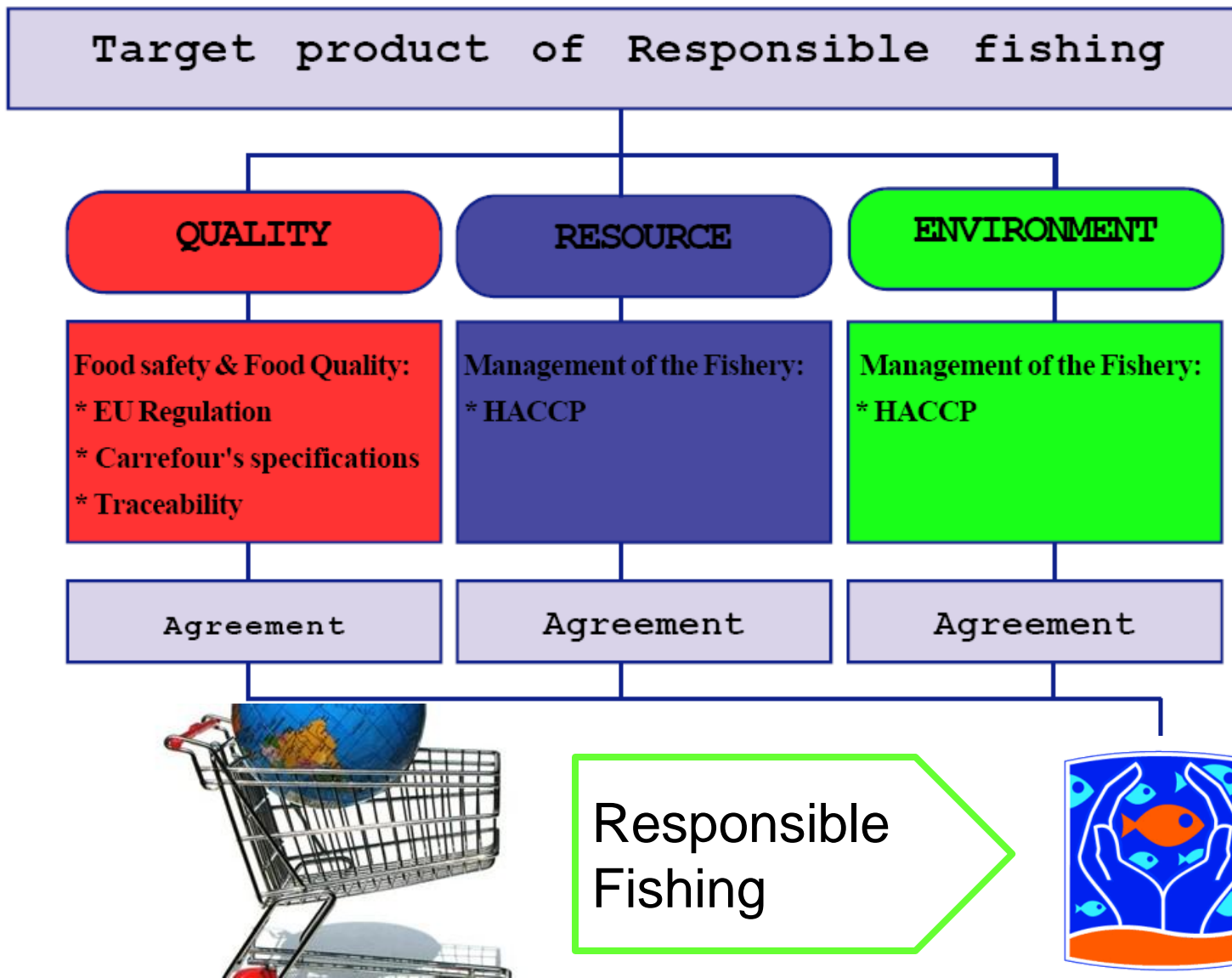
They think that the companies are doing :
11 %, only what they have to do
54 %, not enough

Crisis increase the wishes for a better value in the products





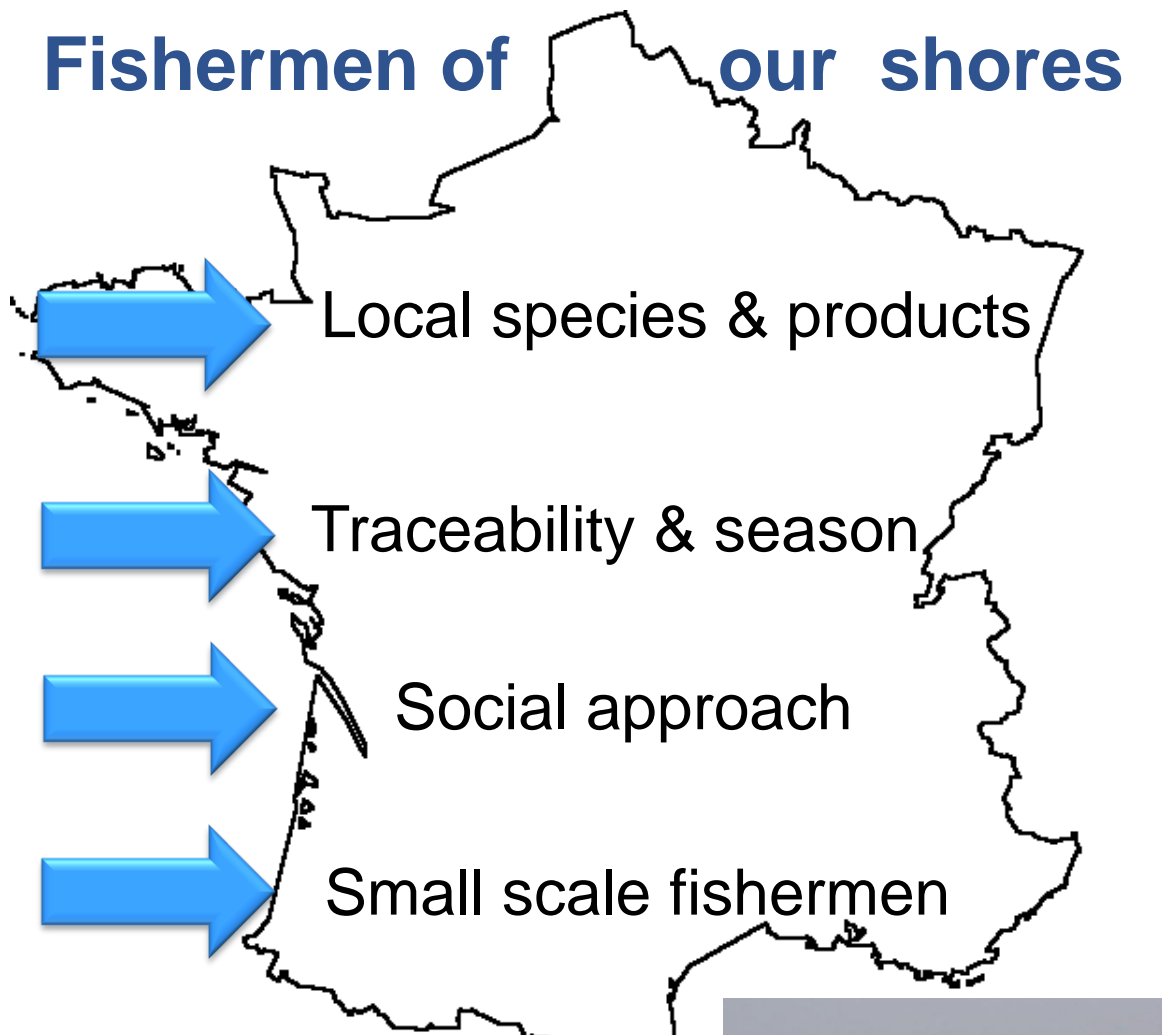
A new sourcing approach is born





Fish products: sustainable trade

Fishermen of our shores



TODAY





Fish products: sustainable trade

Carrefour 1st seller of MSC products in France

« MSC rewards the best and improve the rest »



Carrefour s'engage pour une pêche durable !

La mer est en danger ! Les réserves marines s'épuisent : 80% des espèces marines pêchées sont surexploitées ou en passe de l'être.

Nos Actions

- Promotion produits à marque Carrefour en rayons, pour le logo MSC, pour préserver les ressources de nos océans (poissons frais, surgelés, saumon fumé, coquillages...)
- Suspension de la commercialisation d'espèces invasives telles que le thon rouge, l'empeur et la langouste.
- Les tailles des poissons vendus strictement contrôlées.
- Des produits Engagements Qualité Carrefour au rayon poissonnerie, garantissant qualité et respect de l'environnement.
- Un travail depuis 5 ans avec le WWF sur une politique d'approvisionnement responsable.



Carrefour quality process, supplier audit, specifications, control plan, quality criterias ...



Fish products: sustainable trade



Our fish policy

Guarantee our customers an affordable, quality, environmentally friendly and social conditions

4

4 key points



1. Orient Seafood towards more sustainability.
2. Ensure that new products come from sustainable resources.
3. Fight against illegal fishing.
4. Educate and train employees Carrefour and consumers.



Fish products: conclusion

Analysis & Comments



OUR AMBITION

to become the preferred retailer

OUR DREAM

To be recognized and loved
for helping our customers and consumers
enjoy better quality lives every day

OUR VALUES

Committed, caring, positive

To continue to access the resource, to know the
species to be protected, to protect our image and
responsibility, to maintain affordable prices



QUESTIONS

To keep confidence & to develop

1

Species : We all need to fix a common list to obtain a way to securize the communication and commitments

2

Labels : they help us to give evidences to consumers, the market will need more fisheries under equivalent labels

3

Laws : the environment and biodiversity new paradigm, will oblige the actors to define global rules around the earth

4

Illegal fishing: We need to fight this issue, because it is the roots for a crisis and lost of confidence in fish products

5

Futur : We consider that the agri-aquaculture is an option to continue to sell fish and to develop this market

Thank you for
your attention

