



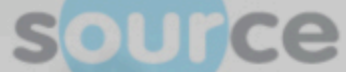
source

The logo for 'source' features the word in a lowercase, sans-serif font. The letter 'o' is replaced by a blue water droplet shape. The background of the logo area is a grayscale photograph of a fisherman in a hat and work clothes, standing on a boat or pier, surrounded by large sacks of fish. The scene is set against a backdrop of water and a distant shoreline.

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Core Values

- More public awareness around social and environmental issues.
- Retailers are developing CSR departments and buying strategies.
- 35% of world fish consumption comes from the EU markets.
- Population reaching nine billion in the coming thirty years.
- Need to double protein production in that time, fish will be a very import source.
- No more land for terrestrial agriculture so intensive aquaculture imperative.



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Sustainability creating competitive advantage and equality through the chain

- Our Source supports both private and public sector.
- Aims to improve competitive advantage, long term economic advantage.
- Opportunity to enhance brand promise.
- Chain ownership reduces failure within the chain.
- All parties should take responsibility.
- Transparency ultimately brings confidence.



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Ecological impacts

- Growing population needs to be taken into consideration.
- The goal is to improve BBP's.
- IUU fishing has devastating effects on our oceans.
- Create chain transparency



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Societal impacts

- The developed market accounts for 80% of the world's population.
- Population grows in the emerging market by six million a month.
- World exports from the emerging markets make up 45% of global export activity.
- Need to make sure that the emerging markets have access to trade.



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Economic impacts

- The emerging market produces 30% of the world's GDP.
- But there is also around a 30% grey/black economy that is not taken into consideration.
- Emerging markets are adding \$1 trillion of output a year.
- Still population is growing faster than economy.
- Need to make sure emerging markets have access to stable economies.

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Quality impact

- The consumers and retailers are starting to demand quality.
- Still ruthless business practices are apparent in some chains.
- The primary producer has high risk.
- Improving chain efficiency and quality brings profits.
- Quality products have a stable position in the market.



Creating and maintaining market access


- Private label is a way retailers can present their sustainable positioning.
- Private label comes with risk to the retailers.
- Chain failure comes at a high price, especially in consumer confidence.
- Recalls can also be associated with sustainable issues.
- Important to have transparency throughout the chain.
- Connecting customer to the source.



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What is next for tuna

- AAFA is a fishery that shows what cooperation can achieve.
- An association of fisherman and their families.
- Stand together and create a united front.
- Similar models should be replicated across other fisheries.
- More pressure needs to be applied to RFMO's.
- Supporting the development of coastal fisheries.



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Our Source and tuna

- Our Source will work to improve BBP's of artisanal tuna fisheries.
- Support fisheries trying to achieve goals towards sustainability.
- Multi stakeholder involvement.
- Use third party certification where possible.
- Hope is on the horizon for the Pacific pole and line fishery.
- With industry support we are seeing change.

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Conclusion

- The industry is changing and the time to act is now.
- Change s made by small steps.
- Platforms are being created for support.
- Challenges will need to be faced.
- Ultimately we will all be rewarded.

Thank you