



The quest for sustainable/ responsible fish meal



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Presentation overview

- Demand for greater assurance about sources and environmental performance of fisheries that supply fish meal
- Issues and challenges in fisheries that supply fish meal
- Issues and challenges for certification schemes
- Driving change – Fishery Improvement Projects
- Role of and action by governments
- What does the future hold?



Growing demand

- Growing market for responsible farmed products in general. For those that require feeds with fish meal this is translating to greater demand for certified/approved fish meal.
- Availability is currently biased in favour of small pelagics such as sardines, anchovies etc.
- Ongoing scrutiny of fish meal by NGOs and others. Impacts of fisheries, though, probably lower than agriculture



Issues and challenges in fisheries

- Better known fisheries are those that are dominated by one or a few species of small, oily fish that live in the water column
- General issues of catch controls and, in some cases, issues associated with dependent species such as birds and mammals
- In Asia, trawl bycatch is used for fish meal. Wide variety of species. Greater variety in products (not just fish meal), less known as 'reduction' fisheries.
- General issues of catch controls but also ecosystem changes.



Issues and challenges for certification schemes

- For fisheries schemes there are some key differences in requirements and claims – e.g. sustainable (MSC) versus responsibly sourced (IFFO RS). The basics are comparable. Differences in rigour and performance expectations drive cost difference.
- Neither the MSC nor the IFFO RS schemes work well for multispecies fisheries. A known issue which both are working to resolve. The solutions chosen may have a big impact on feed production in Asia.
- Part of the problem arises from the fact that expectations for fisheries management outcomes are mainly based on single species fisheries in temperate waters.

Recent developments – ASC Feed Standard

- Feed Standard under preparation – second draft being prepared following first round of consultation
- Aim is to cover fish, plant and animal protein ingredients
- The Standard is being designed as a ‘standard of standards’ in that it relies where possible on certified ingredients (e.g. MSC/IFFO fish) in order to cut assessment times and costs.
- Demand for certified farmed product is being used to drive environmental improvements in ingredients, including fish.
- Aim is to ‘pull’ fisheries into Fishery Improvement Programs and then into certification schemes.

Recent developments – IFFO RS

- Version 2 of the IFFO Responsible Sourcing scheme is currently out for public comment
- Mainly a regular update but needed to include a mechanism for assessing multispecies fisheries (mainly Asia)
- Takes a risk based approach and links closely to Trawl Guidelines prepared by the Asia Pacific Fisheries Commission
- Potential to be trialled with a fishery in Thailand or Vietnam (or elsewhere if the opportunity arises)
- Will link to the IFFO RS Improver Program and then, for ASC Feeds, through to MSC.

Driving change – Fisheries Improvement

- Private standards are commonly about driving improvements.
- Very common for certification candidates to ‘get their own house in order’ before seeking certification
- Action by private assets like farms and factories generally requires no coordination (coffee has a scheme – 4C). Very different to wild fisheries operating on public resources.
- A framework for collective action is the fundamental basis for a Fisheries Improvement Project (FIP)
- Similar to an ISO14000 Environmental Management System – assess, plan, do, review.



A FIP

- is basically a contract between the fishery, the stakeholders and the market that reform will be delivered in return for market access and support
- has a timebound and public workplan
- works to accepted outcomes – MSC, IFFO RS, ASIC
- reports publicly on progress in a timely manner
- has wide stakeholder representation
- has external verification of progress
- FIP implementers can be NGOs, companies or industry groups. Increasing diversification of groups involved
- growing amount of guidance material around

The role of and action by governments

- Declining state of many regional fisheries is well known and acknowledged
- At an intergovernmental level (ASEAN/SEAFDEC) there have been commitments to better fisheries management
- At an intergovernmental level (APFIC/SEAFDEC) regionally specific guidelines and tools have been created
- Some fisheries management plans have been prepared (e.g. Thailand and some in Vietnam)
- Research continues – e.g. recently completed REBYCII project



Summary

- Growing market interest in the long term future of fish meal supplies from wild harvest fisheries in Asia
- Development of requirements for regionally relevant fisheries management are underway and being reflected in market expectations, as expressed via Standards such as the ASC Feed Standard
- Fishery Improvement Projects have evolved as a mechanism for connecting market demand to fisheries reform. FIPs are collaborative in nature and embody regional commitments to comanagement

