

# Seafood Sustainability

Recognizing progress and new opportunities

February 2010



**Seafood Choice Alliance**



**National Fisheries Institute**

# Progress and Opportunities

## Discussion Points

- NFI sustainability commitment and engagement
- Analysis of US seafood purchases
- Analysis of US seafood sourcing
- Analysis of sustainability options
- Introduction of certification benchmark initiative



# National Fisheries Institute

## Sustainability Involvement and Commitments

- Strongly support inclusive, rigorous, transparent NOAA fishery management system for US fisheries
- Participate on MSC Board of Trustees
- Participate on International Seafood Sustainability Foundation Board of Directors
- Support Global Aquaculture Alliance Best Aquaculture Practices
- Recently appointed Ron Rogness, former North Pacific Council Fishery Management Council staff and major seafood buyer, as sustainability leader



# Where Do Americans Spend Seafood Dollars

## Top 10 Seafoods (2008)

	<u>pounds</u>	<u>% total</u>	<u>cumulative %</u>	
Shrimp	4.10	25.6	25.6	
Canned tuna	2.80	17.5	43.1	
Salmon	1.84			11.5
Pollock	1.34	8.4	63.0	54.6
Tilapia	1.19	7.4	70.4	
Catfish	0.92	5.8	76.2	
Crab	0.61	3.8	80.0	
Cod	0.44	2.8	82.8	
Flatfish	0.43	2.7	85.4	
Clams	0.42	2.6	88.1	
All other	1.91	11.9	100.0	

**75% of total seafood in top 6 species. Nearly 9 in 10 in top 10 species**



# Where Do Americans Source Seafood

## Global Matrix

wild, domestic	wild, imports
flatfish pollock cod clams salmon shrimp	tuna crab
catfish	salmon shrimp tilapia
farmed, domestic	farmed, imports



# NFI Views on Sustainability Efforts

## Global Matrix

<p>wild, domestic</p> <p><b>NOAA Fisheries</b> <i>Open, transparent, participatory</i></p> <p><b>MSC</b> (when market dictates) <i>Transparent, participatory, improving</i></p>	<p>wild, imports</p> <p><b>ISSF</b> <i>Science-led, action-oriented</i></p>
<p><b>GAA BAP</b> Best Aquaculture Practices <i>Transparent, participatory, improving</i></p> <p>farmed, domestic</p>	<p><b>GAA BAP</b> Best Aquaculture Practices <i>Transparent, participatory, improving</i></p> <p>farmed, imports</p>



# NFI Views on Sustainability Efforts

## Top Ten Seafoods

Shrimp	GAA Best Aquaculture Practices
Canned tuna	ISSF
Salmon	NOAA, Alaska DFG, MSC, Aqua ---???
Pollock	NOAA, MSC (Alaska)
Tilapia	GAA BAP
Catfish	GAA BAP
Crab	Sustainable Fisheries Partnership
Cod	NOAA, MSC (Alaska)
Flatfish	NOAA
Clams	NOAA
All other	

**Most seafood already under some sustainability effort**



# NFI Views on Sustainability Efforts

## Rating cards and buyer lists

### BEST CHOICES

Arctic Char (farmed)  
Barramundi (US farmed)  
Catfish (US farmed)  
Clams (farmed)  
Cobia (US farmed)  
Cod: Pacific (Alaska longline)<sup>+</sup>  
Crab: Dungeness, Stone  
Halibut: Pacific<sup>+</sup>  
Lobster: Spiny (US)  
Mussels (farmed)  
Oysters (farmed)  
Sablefish/Black Cod  
(Alaska<sup>+</sup> or British Columbia)  
Salmon (Alaska wild)<sup>+</sup>  
Scallops: Bay (farmed)  
Shrimp, Pink (Oregon)<sup>+</sup>  
Striped Bass (farmed or wild)<sup>+</sup>  
Tilapia (US farmed)  
Trout: Rainbow (farmed)  
Tuna: Albacore (troll/pole, US<sup>+</sup>  
or British Columbia)  
Tuna: Skipjack (troll/pole)

- Fisheries management by graphic balance
- Lack of transparency on how decisions made
- Total lack of review and rebuttal
- Total lack of differentiation among suppliers .... “We are not going to confuse consumers with differentiating between cods”
- Limiting to working families

### AVOID

Caviar, Sturgeon\* (imported wild)  
Chilean Seabass/Toothfish\*  
Cobia (imported farmed)  
Cod: Atlantic, imported Pacific  
Flounders, Halibut, Soles (Atlantic)  
Grouper\*  
Lobster: Spiny (Caribbean)  
Mahi Mahi/Dolphinfish (imported)  
Marlin: Blue\*, Striped\*  
Monkfish  
Orange Roughy\*  
Salmon (farmed, including Atlantic)\*  
Sharks\*, Skates  
Shrimp (imported)  
Snapper: Red  
Swordfish (imported)\*  
Tilapia (Asia farmed)  
Tuna: Albacore, Bigeye, Yellowfin  
(longline)\*  
Tuna: Bluefin\*, Tongol, Canned  
(except Albacore and Skipjack)  
Yellowtail (imported farmed)











Red list would force about 45% of seafood off retailers shelves



# NFI Views on Sustainability Efforts

## Rating cards and buyer lists











### Comparison of Sustainable Seafood Programs

 Marine Stewardship Council Program	CRITERION	 Monterey Bay Aquarium's Seafood Watch Program
<p>An international seafood certification program. Its mission is to "use our ecolabel and fishery certification program to contribute to the health of the world's oceans by recognizing and rewarding sustainable fishing practices."</p>	<b>Mission of Organization</b>	<p>A program of the Monterey Bay Aquarium, an advocacy organization. Its mission is "to inspire conservation of the oceans."</p>
<p> Fishery assessments are conducted by certification bodies, which are accredited and work independent of the MSC. Certification bodies conducting fishery assessments retain independent experts with knowledge of the specific fishery being assessed.</p>	<b>Independence</b>	<p> Seafood rankings are devised by in-house staff at the Monterey Bay Aquarium, not by an accredited certification body. The qualifications and expertise of the Monterey Bay Aquarium staff regarding the over 70 fisheries they have evaluated is unclear.</p>
<p> Fishery assessments focus on discrete stocks of fish under a specific fishery management authority.</p>	<b>Stock Under Consideration</b>	<p> Rankings can reference a species of fish without considering the specific fishery management regime.</p>
<p> The certification process requires certifiers to seek public input at all meaningful stages of the fishery assessment process.</p>	<b>Public Input</b>	<p> There is no provision for public participation. Seafood Watch decides who, if anyone, is consulted on a fishery's sustainability record.</p>
<p> Fishery assessments often take 18-36 months to complete and assessment process timelines are published on the MSC website to inform the public. Fisheries are evaluated against three dozen performance indicators with detailed scoring guidelines, and assessments must consider the status of the fish stock, the fishery's impact on the ecosystem, and the adequacy of the fishery management system. More than 100 independent experts have assessed fisheries in the program. Certified fisheries are subject to annual audits and must undergo a full reassessment every five years.</p>	<b>Assessment Methodology</b>	<p> There is no regular schedule for reviews of fisheries. There are no provisions for the limited Aquarium staff to stay current on developments with the global scope of wild capture fisheries and aquaculture species ranked by the program.</p>

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### Comparison of Sustainable Seafood Programs

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 Marine Stewardship Council Program	CRITERION	 Monterey Bay Aquarium's Seafood Watch Program
<p> Assessment policies, criteria and procedures are well documented and public.</p>	<b>Transparency</b>	<p> Neither the public nor the fisheries under assessment are notified when fisheries are being reviewed by this program.</p>
<p> Fishery assessments are subject to external peer review. There is public input on the selection of peer reviewers and the reviewers' comments are published.</p>	<b>Peer Review</b>	<p> Program methodology does not disclose who peer reviewed the findings of in-house staff, nor does it publish the peer review comments.</p>
<p> The MSC objections procedure provides an opportunity for stakeholders to challenge the sustainability determination of the accredited certifier. An objection can be filed by any stakeholder on procedural or substantive grounds, and the objection is considered by an Independent Adjudicator.</p>	<b>Objections Procedure</b>	<p> There is no provision in the program for an independent body to review the findings of in-house staff to guard against bias or procedural irregularities.</p>
<p> The MSC is governed by a Board of Trustees composed of individuals from around the globe, representing, among other interests, the environmental community, the fishing industry and the seafood marketplace. The MSC's Technical Advisory Board considers changes to the sustainability standard and recommends policies to implement the fishery assessment and traceability aspects of the program and is composed of individuals with expertise and experience in these areas. A Stakeholder Council that includes members of the environmental community, academia, and the seafood industry advises the MSC on policy matters.</p>	<b>Governance</b>	<p> The program is an initiative of the Monterey Bay Aquarium. There is an Advisory Board for the program, although board members are not publically identified.</p>

# NFI Future Activities on Sustainability

## Options to Increase Partnerships



- ICFA partnership with World Bank
- Designed to assist developing nations improve fisheries management
- Components of market access essential
- Major benchmarking project
- Will reduce clutter of certifications
- Builds off Fish Sustainability Information Group initiative
- Offers opportunity to benchmark
- Based on successful GFSI model for food safety programs
- Core is FAO Fisheries Code of Conduct and related agreements
- Diverse steering group (developing and developed nations, producers thru retailers)



# National Fisheries Institute

## Suggestions for Retailers

- Understand what consumers say and what they do --- they are usually different, especially on sustainability
- Think carefully about your partners
- Examine the business impact of your sustainability decisions ... not just the public relations aspect
- Demand your suppliers review the sustainability status of your purchases
- Have your own base knowledge about sustainability --- do some independent research (e.g., NOAA Fisheries Fishwatch website)



# Seafood Sustainability

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**Seafood Choice Alliance**



**National Fisheries Institute**