Fishmeal and fish oil fisheries – current status and future opportunities

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Sustainable Fisheries Partnership
Who is SFP

• Non-profit/NGO created to educate and assist supply chain to improve fisheries and aquaculture grow-out regions

• Core approach to improve access to information to guide responsible seafood sourcing, and enhance the ability of seafood companies and partners to improve fish-farming and capture fisheries

• 60 staff in 15 market and producer countries.

• Dedicated science, market and field teams

• Partnerships with many global retailers and suppliers
The problem

• The aquaculture industry needs access to marine resources for feed – fishmeal and fish oil – which are obtained from wild fisheries but these resources are not always well managed.
There are partial solutions

- The development of fishmeal and fish oil from by-products is increasing (perhaps in excess of 33% of the market in the UK)
- Alternative feed sources are being developed, e.g. methane-derived materials, insects
- Genetically modified vegetable oils with omega-3s
- Aquaculture is becoming ever more efficient in the way it uses feed materials

But it does not solve the problem!
They are only partial solutions.....

• Demand for fishmeal and fish oil keeps growing

• Fishmeal and fish oil are excellent feed ingredients which will out perform their rivals

• Aquaculture needs fishmeal and fish oil!
Responsible fishmeal/fish oil

Fishmeal and fish oil need to come from responsibly managed sources, for example:

• Marine Stewardship Council certified

• IFFO RS certified

• From a Fishery Improvement Project
Responsible feed sources recognized by aquaculture certifications

- GAA BAP – 50% MSC or IFFO RS or in a FIP

- ASC – MSC after five years (IFFO before that) but this standard is changing. May well include FIPs
The Principal Question:

Is there enough responsibly produced fishmeal and fish oil to meet the demands of aquaculture certifications?
The major sources of fishmeal

Total catch per type reduction fishery ('000t)

- Atlantic/Pacific reduction fisheries
- SE Asia reduction fisheries

50% 50% 50%
Major sources of fishmeal

SE Asia reduction fisheries

- Multi-species trawl: 24.00%
- Directed small pelagic fisheries: 26.00%

Atlantic/Pacific reduction fisheries

- Other Atl/Pac regions: 6.60%
- Eastern Central Atl: 6.00%
- NE Atl: 15.50%
- SE Pacific: 21.50%
Status of Atlantic and South American fishmeal/oil fisheries

- IFFO RS (no MSC C/FA, no FIP (A-C)) 68%
- MSC Certified or MSC FA 16%
- in a FIP (A-C) 11%
- no certification / no FIP (A-C) / no IFFO RS 5%

**Atl/Pac Reduct Fish**
(total production: 8,973.7 kt)
Atlantic fisheries

• Single-species fisheries that are generally well managed

• Many Atlantic fisheries are improving and are IFFO RS approved

• Presence of MSC is growing. Blue whiting is now MSC certified, Icelandic capelin and others are in MSC full assessment. Northwest African fisheries may join the program

• Expect a significant increase in the volume of MSC-certified fishmeal/oil – perhaps 15% of global production within next 2/3 years.
South America

- South America is static – fisheries are generally competently managed but are not improving
- Many IFFO RS approved fisheries
- Some signs of interest from Chile in MSC fisheries but Peru remains elusive
South East Asia fisheries

SE Asia Reduct Fish
(total production: 9,050.2 kt)

- MSC Certified or MSC FA: 0%
- IFFO RS (no MSC C/FA, no FIP (A-C)): 0%
- In a FIP (A-C): 1%
- No certification / no FIP (A-C)/no IFFO RS: 99%

South East Asia fisheries (total production: 9,050.2 kt)
South East Asia

• Fish come from many different fisheries with different gear types
• A lot comes from multispecies fisheries but there are single-species small pelagics as well
• Fisheries data is severely lacking – a lot of uncertainty about volumes
• Fisheries management is generally very poor and ecological impacts very high
• No certified reduction fisheries and few FIPs
A wide mix of species including vulnerable species
Status of global supply

entire sector
(total production: 18,023.9 kt)

- MSC Certified or MSC FA: 8%
- IFFO RS (no MSC C/FA, no FIP (A-C)): 34%
- in a FIP (A-C): 6%
- no certification / no FIP (A-C)/no IFFO RS: 52%
Summary

Good news

• Most (95%) fishmeal and fish oil derived from the Atlantic or South America meets GAA BAP feed mill criteria

Bad news

• Most (99%) fishmeal and fish oil from SE Asia does not meet GAA BAP feed mill criteria
Meeting the Asia fishmeal challenge

• There are unlikely to be any certified reduction fisheries in Asia any time soon
• Fishery improvement projects (FIPs) are the best short-term option
• If you want to be able to buy Asian fishmeal you need to support FIPs
What is a FIP?

A FIP is an alliance of buyers, suppliers and producers that work together to improve a fishery, by:

- Pressing for better policies and management
- Voluntarily changing fishing practices
- Communicating their actions with buyers
How FIPs Work

**Fishery Assessment**: MSC pre-assessment, IFFO RS gap analysis, FishSource profile, other third party assessment

**Formation of a FIP**: Stakeholders agree to join as participants
How FIPs Work

**Agreement of a Workplan:** Outlines tasks needed to make improvements and assigns responsibility

**Implementation:** Working with government, improving data, gear changes, policy changes, etc.

**Reporting:** Public updates of progress against the workplan
The Seafood Industry Guide to FIPs
An introduction to setting up and running a fishery improvement project
Different FIP approaches

- IFFO RS improver program
- ASEAN FIP protocol
- MSC fisheries-in-transition
- WWF ‘comprehensive FIP’
- SFP-style FIP based on Fishsource profile

They are all good – it’s the improvement that counts!
SE Asia – some FIPs already

• Lower Mekong Kien Giang – see FIP Directory
• Lower Mekong Ben Tre – see FIP Directory
• Andaman Sea – in preparation (Thai Sustainable Fisheries Roundtable)
• Gulf of Thailand – in preparation (Thai Sustainable Fisheries Roundtable)

www.fisheryimprovementprojects.org
SE Asia fisheries need many more FIPs

How can we achieve this?
The SE Asia Sustainable Fishmeal Roundtable
SE Asia Sustainable Fishmeal Roundtable

• Open to aquaculture feed companies operating in SE Asia as well as processors and retailers
• Specifically aimed at generating more FIPs in the region
• Works through convening key stakeholders in the supply chain to support existing FIPs, encourage new FIPs
Role of roundtable participants

- Adopt procurement policies that support FIPs
- Support FIPs through preferential sourcing
- Give public support to FIPs and join industry colleagues in communicating that support to the supply chain
- Participate in FIPs that are important parts of a participants supply chain
Next meetings

- Here! Today! 5 pm – 7 pm in Board Room 1

- IFFO annual meeting in Bangkok, Monday 24th October

More info on reduction fisheries and FIPs at: www.sustainablefish.org