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