



Sustainable Tuna Roundtable

Meeting Report

April 21, 2008

Manos Conference Centre, Brussels, Belgium



Sustainable Tuna Roundtable Meeting Report

April 21, 2008

Manos Conference Centre, Brussels, Belgium

International Union for the Conservation of Nature (IUCN) • 2718 Napuaa Place • Honolulu, Hawaii
96822 USA • www.iucn.org • eric.gilman@iucn.org

Western Pacific Regional Fishery Management Council • 1164 Bishop Street, Suite 1400 • Honolulu,
Hawaii 96813 USA • www.wpcouncil.org • kitty.simonds@noaa.gov

Sustainable Tuna Roundtable

Goal and Objectives

GOAL

The Tuna Roundtable brings key industry interests together to reach agreement on how to employ market-driven incentives from eco-labeling, certification, and retailer and buyer sustainable seafood sourcing policies to contribute to producing sustainable tuna fisheries.

OBJECTIVES

- Reach agreement for the development and adaptive management of a single set of standards against which to assess the sustainability of tuna fisheries.
- Improve the communication of fishery data. Provide a formal means for the tuna fishing industry to increase the factual basis of fishery sustainability assessments and seafood sourcing policies, and ultimately improve the sustainability of practices by the tuna fishing industries.
- Provide an opportunity for the tuna industry to learn about and identify opportunities to participate in the sustainable seafood movement, and for retailers and seafood buyers to learn about and identify opportunities to contribute to initiatives of the tuna industry and regional fisheries bodies to achieve sustainable marine capture tuna fisheries.
- Identify prospects for eco-labeling tuna industries.
- Provide opportunities for new buyer-seller matching.

Sustainable Tuna Roundtable

Summary and Conclusions

The Sustainable Tuna Roundtable brought key industry interests together to reach agreement on how to employ market-driven incentives to contribute to producing sustainable tuna fisheries. Participants were from the tuna fishing industry, retail/foodservice industries, buyers, distributors, processors, and intergovernmental organizations, including regional fisheries management organizations (RFMOs) and other regional fishery bodies.

Environmental non-governmental organizations, and to a degree, consumers, are increasingly demanding that seafood (both from marine capture fisheries and aquaculture) sold by retailers and restaurants be produced and processed in an environmentally sustainable and socially responsible manner. Approaches by major grocery retailers to demonstrate that their seafood comes from sustainable fisheries have been diverse, with each individual chain employing different measures. There has been a recent proliferation of programs assessing the sustainability of individual fisheries or seafood species available to retailers. These include in-house retailer programs, ranging from the assessment of fisheries against retailer-established sustainability criteria; individual retailer partnerships with environmental non-governmental organizations who conduct assessments and make recommendations for sustainable seafood sourcing; and use of a retailer eco-label. There are also numerous third-party programs for marine capture fisheries, including eco-labeling programs, and consumer guides, which assess the sustainability of individual fisheries, rank the relative sustainability of individual seafood species, or rank retailers based on the sustainability of their seafood sourcing practices.

Roundtable participants agreed that international management of commercial tuna fisheries' sustainability through regional fisheries management organizations (RFMOs) requires improvements. Tuna fishing companies want RFMOs to be successful, recognizing that the long-term viability of their businesses rely on the availability of tuna resources at sustainable and optimal levels. In some areas, RFMO management improvements are required to address the overcapacity of tuna fleets, allow rebuilding needed for some tuna stocks and avoid and minimize adverse ecosystem effects of tuna fisheries, including bycatch of sensitive species groups and the catch and discarded bycatch of juvenile and undersized tunas. Furthermore, international management has generally not been successful in addressing problems created by substantial illegal, unreported and unregulated (IUU) fishing, which hampers the effective management of tuna fisheries.

RFMO management ineffectiveness has occurred, in part, due to low compliance by member states with RFMO measures and because consensus-based decision-making has often prevented the adoption of appropriate measures. The tuna industry recognizes it can play a significant role towards preventing overexploitation of tuna stocks and reversing it when it occurs, addressing bycatch issues, enhancing data collection and communication, and improving management. **To address these problems, participants agreed to increase retail, processor, buyer, distributor and tuna fishing industry participation in RFMO activities to push for adoption of and compliance with legally binding measures to achieve**

sustainable tuna fisheries. Participants discussed benefits from the establishment of national competent authorities for fishery sustainability certification and labeling.

Eco-labeling and other certification programs were seen as having the potential to provide an important, complementary, market-driven incentive to improve tuna fisheries' sustainability. There was discussion, but a lack of consensus, regarding the utility of certification programs in providing independent, third-party (in some cases, peer-reviewed) verification of the success of fishery management. Participants discussed how third party assessments rely largely on government-collected fishery data, including fishery data held by RFMOs. There was, however, general consensus that certification programs provide the fishing industry with incentives to push their national governments and RFMOs to engage in better management. **The Food and Agriculture Organization of the United Nation's Code of Conduct for Responsible Fisheries was agreed to be an appropriate starting point as a global, single set of standards against which to assess the sustainability of individual marine capture fisheries.** These minimum standards address the: (i) adequacy of the fisheries management systems, (ii) the health of stocks under consideration, and (iii) ecosystem effects (e.g., bycatch of sensitive species groups, habitat effects from fishing gear, status of stocks of non-target catch, impacts on dependent predators).

Roundtable participants recognized that several programs which assess the sustainability of marine capture fisheries already exist, and that some have room for improvement, including in their accuracy and scientific rigor, and in how they convey results to consumers. Participants identified examples of programs that make recommendations on seafood procurement, including some seafood certification programs, which have been overly simplistic, relied on incorrect or incomplete information, made broad generalizations, and disseminated misleading or incorrect information. These concerns could be addressed through augmented scientific vigor in assessment methods, and improvements in how information is conveyed to the consumer. **To this end, participants agreed to improve communication of how to improve tuna fisheries' sustainability and the basis for tuna sourcing decisions.**

Furthermore, participants expressed interest in a single set of global minimum sustainability standards as a means to address confusion and diminished confidence by consumers, environmental groups, and the fishing and seafood industries in assessment results created by there being numerous and a rapidly growing number of competing programs. Examples of competing certification programs with conflicting opinions on the sustainability of individual fisheries were noted to highlight this issue. Participants agreed that, while the development of assessment methods and certification programs for marine capture fisheries are in an initial stage, sustainability issues and certification in fisheries are likely to remain key issues in seafood markets for the foreseeable future. **Participants agreed to continue communication between the retailer, buyer, distributor, processor and fishing industry sectors to address their demand for global, harmonized standards against which the sustainability of tuna fisheries can be assessed, and involvement in the evolving use of market-based tools for sustainable sourcing of tuna products.**

The meeting was co-hosted by IUCN (International Union for the Conservation of Nature) (www.iucn.org) and the Western Pacific Regional Fishery Management Council (www.wpcouncil.org) with sponsorship provided by the Sea Fish Industry Authority, UK (www.seafish.org), Royal Caribbean International (www.royalcaribbean.com) and the Hawaii Longline Association (hawaiilongline.org). The Roundtable was organized by IUCN's Eric Gilman.

ROUNDTABLE PARTICIPANTS

Fishing industry: Hawaii Longline Association, Luen Thai Fishing Venture Ltd., National Fisheries Institute, OPAGAC (Organización de Profesional de Grandes Atuneros Congeladores), Pacific Islands Industry Tuna Association, Western Fishboat Owners Association, World Tuna Purse Seine Organization (WTPO), and Organisation Des Producteurs de Thon Congele (Orthongel).

Retailers, buyers, exporters and processors: Lidl Stiftung & Company KG, Migros (MICARNA SA), Tesco Stores Ltd., Whole Foods Market, Connors Bros. (parent company of Bumble Bee Foods U.S. and Clover Leaf Seafoods, Canada), Atuna, New England Seafood International Ltd., Seachill (Division of Icelandic Group UK Ltd.), MW Brands, and Maldive Marine Products.

Intergovernmental organizations, including regional fisheries management organizations, and environmental non-governmental organizations: Western Pacific Regional Fishery Management Council, Food and Agriculture Organization of the United Nations, Indian Ocean Tuna Commission, Inter-American Tropical Tuna Commission, Pacific Islands Forum Fisheries Agency, Sea Fish Industry Authority, Secretariat of the Pacific Community, Standards Norway (ISO/TC 234 Secretary), IUCN, and Marine Conservation Society.

Sustainable Tuna Roundtable

Donors

The following organizations have kindly contributed financial support for convening the Sustainable Tuna Roundtable:

Sea Fish Industry Authority, UK <<http://www.seafish.org>>

Royal Caribbean International <<http://www.royalcaribbean.com>>

Hawaii Longline Association <<http://www.hawaiilongline.org/>>





Sustainable Tuna Roundtable Agenda - 21 April 2008

- 8:00 – 8:30 Registration, coffee break
- 8:30 – 8:40 **Welcome** (IUCN and WPRFMC)
- 8:40 – 9:00 **Announcements, review agenda, Chatham House rule, introduce facilitators, participant introductions**, (Dr. Cathy Roheim, University of Rhode Island; François Simard & Eric Gilman, IUCN). *Eric Gilman, IUCN*
- 9:00 – 9:30 **Sustainable seafood ‘movement’, current and potential future retail markets for value-added, sustainable and eco-labeled tuna products**. *Lucy Pelham Burn, New England Seafood International Limited & Nigel Edwards, Seachill (Division of Icelandic Group UK Ltd)*
- 9:30 – 9:45 **An initiative to establish an agreed, standardized method to assess the sustainability of retailer seafood sourcing practices**. *Melissa Pritchard, Marine Conservation Society*
- 9:45 – 10:00 **BSI British Standards Responsible Fishing Scheme, Good Practice Guide for Tuna, and Sri Lanka tuna fisheries**. *Dr. Jon Harman, Sea Fish Industry Authority & Stephen Akester, Macalister-Elliot*
- 10:00 – 10:15 **Overview of commercial tuna fisheries and priority conservation and management issues**. *Eric Gilman, IUCN*
- 10:15 – 10:45 Coffee break
- 10:45 – 11:00 **Purse seine industry perspective on demand for safe and sustainable sources of seafood**. *Dr. Michel Goujon, Organisation Des Producteurs de Thon Congele*
- 11:00 – 11:15 **Pacific Islands longline industry perspective on the demand for sustainable sources of seafood**. *Mr. Charles Hufflett, Pacific Islands Tuna Industry Association*
- 11:15 – 11:30 **Troll and pole and line albacore industry perspective on demand for sustainable sources of seafood**. *Mr. Wayne Heikkila, Western Fishboat Owners Association*
- 11:30 – 12:00 **Pacific Islands Forum Fisheries Agency pre-assessment of WCPO tuna fisheries against the Marine Stewardship Council principles and criteria**. *Mr. Len Rodwell, Pacific Islands Forum Fisheries Agency & Dr. Tim Adams, Secretariat of the Pacific Community*
- 12:00 – 12:15 **FAO Eco-labeling Guidelines, Code of Conduct for Responsible Fisheries, and FAO Next Steps in Response to Retail Industry Demand for Practical Sustainability Standards**. *Dr. Grimur Valdimarsson, Food and Agriculture Organization of the United Nations*
- 12:15 – 13:45 Lunch (provided)
- 13:45 – 14:30 **Discussion Session 1: Prospects, pros and cons of assessing/certifying/labeling individual tuna fisheries or companies, and consensus optimal approach for assessments/certification**.

- 14:30 – 15:00 ***Discussion Session 2: Opportunities to improve communication of fishery data – optimizing the factual basis of fishery sustainability assessments and seafood sourcing policies.***
- 15:00 – 15:30 Coffee break
- 15:30 – 16:30 ***Discussion Session 3: Options for (IUCN? FAO? ISO?) development and ownership of an agreed, single set of standards for the ecological sustainability, social responsibility and food safety of commercial tuna fisheries and retailer tuna sourcing practices.***
- 16:30 – 17:30 **Recap main meeting conclusions and agreed next steps.**

(Agenda, page 2)



Sustainable Tuna Roundtable

Presentation Abstracts

The Sustainable Seafood 'Movement', Current and Potential Future Retail Markets for Value-Added, Sustainable and Eco-Labelled Tuna Products

Lucy Pelham Burn, New England Seafood International Limited and
Nigel Edwards, Seachill, division of Icelandic Group UK Ltd

The UK market is seen as one of the leaders in the sustainable and responsible sourcing arena. This is partly driven by consumer demand arising from NGO and media activity but the main driver is because the majority of fish is sold in UK in the major retailers under their own brand names – unlike many other markets. These retailer brands stand for more than high quality; they encompass their commitment to corporate social responsibility that, for fish, means responsible sourcing and communicating provenance to the consumer. The consumer trusts the retailer to be selective and make their choices for them.

There are now a number of forums in the UK and its supply chains where once-divided stakeholders are coming together to find common ground. The aim is to learn about examples of best practice together, share accurate science, and promote communication about subjects such as fisheries management, bycatch controls and the stock status of individual fisheries. These groups have started to take a direct involvement in the issues such as data collection, avoidance of IUU through control procedures, encouraging the compliance with RFMO procedures and development of good practice guides for fishermen.

The presentation will explore these drivers and actions, ask if they can be expanded into a worldwide cooperation between stakeholders, and suggest that market drivers can accelerate positive change.

An Initiative to Establish an Agreed, Standardized Method to Assess the Sustainability of Retailer Seafood Sourcing Practices

Melissa Pritchard, Fisheries Policy Officer, Marine Conservation Society

In the United Kingdom, the Marine Conservation Society (MCS) has led the way in the sustainable seafood movement, producing educational guides that allow the consumer to make an informed seafood choice. In this presentation, I will focus on the high influence of the consumer in driving the move toward sustainable seafood, and the involvement of MCS with other organizations working on sustainable seafood initiatives. I will highlight the key factors that feature in seafood sustainability criteria; including details of the MCS assessment methodology for the successful web resource 'Fishonline' - a guide for consumers, suppliers and retailers on sustainable seafood choices. Consequently, members of the Sustainable Tuna Roundtable will be asked how future collaborative work can include an exchange of accurate and regular information on global tuna stocks and their import to the UK market, which is fundamental to the assessment of sustainable seafood stocks and retailer sourcing policies.

BSI British Standards Responsible Fishing Scheme, Good Practice Guide for Tuna, and Sri Lanka Tuna Fisheries

Dr. Jon Harman, Sea Fish Industry Authority and
Stephen Akester, Macalister-Elliot

In this presentation we discuss the range of certification schemes in the seafood industry and how they interrelate with each other and with fisheries management. We provide some insight on how these procedures have developed to cover IUU fishing and describe how a good practice guide for the tuna longline fishery has been developed in Sri Lanka, and the challenges this presents.

Overview of Commercial Tuna Fisheries and Priority Management Issues

Eric Gilman, IUCN Marine Programme, Eric.Gilman@iucn.org

Despite their high fecundity, most tuna stocks are fully exploited, and some are overfished or even depleted. It is unlikely that the major tuna species can sustain greater catches. Despite there being some skipjack stocks that are only moderately exploited, it is not possible to increase skipjack catches sustainably due to the bycatch of other tuna species, including small bigeye and yellowfin. Tuna and tuna-like species are an important food source and global commodity, are used mostly for canning and *sashimi*, and are target species of fisheries worldwide. Demand for both canned and fresh tuna has been rapidly increasing, tripling from 1976 to 2004 from about 500,000 MT of tuna consumed in 1976 to about 1,500,000 MT in 2004. The main conservation issues facing the management of tuna fisheries include:

- (i) Overexploitation of tuna stocks, (ii) incidental bycatch of sensitive species groups (seabirds, sea turtles, marine mammals and sharks) in longline and purse seine fisheries; and (iii) bycatch of juvenile and undersized tunas in purse seine fisheries. Furthermore, (iv) substantial illegal, unreported and unregulated (IUU) fishing, which occurs in all oceans, complicates the management of tuna fisheries. Purse seine, pelagic longline and pole-and-line fisheries are the primary commercial fishing methods for catching tunas. Purse seine vessels generally catch younger age classes of skipjack, yellowfin and incidental bigeye for the canned tuna market. There are about 570 large scale purse seine vessels, which catch about 58% of the total global tuna landings. Longline vessels generally catch older age classes of bigeye and bluefin, primarily for the *sashimi* market. Longline vessels catch about 15% of the total global tuna landings. Total catch by large longliners has been stable or slightly decreasing since the late 90's. Catch by smaller coastal longliners has been increasing. The number of pole-and-line vessels, which catch about 14% of global tuna landings and contribute to the canned tuna market, has been stable for the past decade. Some purse seine and longline fishing associations have taken voluntary measures to limit fishing capacity and effort and to avoid and minimize bycatch of sea turtles and seabirds. Most tuna regional fisheries management organization (RFMOs) have adopted measures to manage tuna fishing capacity levels and bycatch. In early 2007 a joint meeting of the five tuna regional fisheries management organizations was held, resulting in the adoption of a Course of Actions and guidelines for performance assessments. Overall, these industry and RFMO measures have been unsuccessful in preventing continued growth of tuna fleets, in allowing rebuilding needed for some tuna stocks, and in minimizing bycatch. Tuna ranching, where lean juvenile and adult bluefin tunas caught by purse seine vessels are placed in nearshore cages for several months in order to increase their fat content before selling them into the sashimi market, is a growing industry, which complicates monitoring catch levels and determining the size composition of the

catch since a large proportion of purse seine catch is sold and transshipped in international waters.

Purse Seine Industry Perspective on Demand for Safe and Sustainable Sources of Seafood

Dr. Michel Goujon, Organisation Des Producteurs de Thon Congele

ORTHONGEL is the French Producers Organisation of frozen tuna gathering all French purse-seine vessel owners and managers. As a member of the World Tuna Purse Seine Organization (WTPO), it was asked to give the sector's point of view regarding the purse-seine industry perspectives on the issue of sustainability and food safety. The presentation stresses the fact that sustainable exploitation of the tuna resources is one of the priorities of sector as shown by the following observations:

- Tuna populations targeted by tropical purse seiners are widely distributed and partly not accessible to fisheries, which makes the targeted stocks considered as moderately or, at worst, fully exploited in the Atlantic and Indian Ocean where community fleets play an important role;
- Tropical tuna purse-seine fishing is managed by RFMOs which does not prevent the sector to propose additional measures (moratorium in the Atlantic Ocean, prohibition of transshipment at sea);
- The purse seine is a selective gear (on average 95% of the catch of the European vessels are composed of the targeted species) and the sector, being aware of concerns regarding the conservation of emblematic species aims to improve even more the selectivity of the gear;
- The fishing effort has been generally frozen by the RFMOs and through the WTPO, the industry supports a control capacity while preserving the ability of local countries to develop their own fleets;
- The bulk of the catch is valued and discards are limited, especially in the Atlantic Ocean; transshipment at port under tight customs and sanitary controls allow the sector to supply all canneries; and
- The European market require the sector to respect EU sanitary rules, which gradually become an industry standard for extra EU trade.

Convinced that the profitability of their industry also depends on the public perception of the tuna product as a healthy and environmentally friendly source of protein and omega-3, most professionals consider certifying their product on the aspect of "tuna responsible fishing" *ie* focusing on the sustainability of stocks, the respect for the environment, the compliance with health and quality standards but also the improvement of working conditions and the participation in the development of third countries through fisheries agreements.

Pacific Islands Longline Industry Perspective on Demand for Sustainable Sources of Seafood

Mr. Charles Hufflett, Pacific Islands Industry Tuna Association

The pelagic longline industry provides the ultimate in quality of large tunas to the table and other commercial uses. By the quality it produces it provides the best economic use of the resource – primarily Big Eye, Yellow Fin and Albacore. Yet, today, the global Industry faces an economic crisis the like of which has not been seen before. The High Seas fleets of only a decade ago are being reduced as a consequence of overfishing and higher (fuel, etc.) operating costs.

Increasingly, the larger vessels are being replaced by smaller more cost efficient vessels working more locally than on the High Seas.

Despite the pressures being placed on the catching sector, demand for *Sashimi* quality in world markets is increasing as more people outside of Japan see Sashimi and Sushi as a healthful food alternative. The price return to the fisherman has not matched market demand – this being much as a consequence of the lower US dollar and Yen.

In this situation the smaller Pacific Island states – the commercial interests of which the Pacific Islands Industry Tuna Association (PIITA) represents – seeks to increase its involvement in providing a sustainable supply of quality tuna to world markets. The scenario now being played out in the Western Central Pacific - home to one of the World's largest tuna resources – is an interesting mix of fishery politics, rights allocation and sustainability. Associated with commercial concerns lies the inevitable complex issue of the ecologically related species and bycatch.

That the Regional Fisheries Management Organisation in the Western Pacific has not resolved matters of overfishing of bigeye and yellowfin and that it proceeds at an inordinately slow pace is of serious concern. The future economic well being of many of the smaller nations in the Pacific lie in balance and subject to wise decisions on sustainability which need now to be taken. Notwithstanding these concerns, a future robust and financially stable longline fishing industry from the Pacific can offer a sustainable food source. Environmental issues can and will be addressed by those who have a long term investment in the future.

The Troll and Pole and Line Albacore Industry Perspective on Demand for Sustainable Sources of Seafood

Mr. Wayne Heikkila, Western Fishboat Owners Association

The U.S. Pacific Troll and Pole and Line (baitboat) albacore fisheries are in a unique position regarding potential increasing demand for sustainable seafood. The U.S. North Pacific albacore troll fishery consists of small family-owned vessels that land about 15% of total North Pacific albacore annually. Troll or baitboat methods make almost 100% of those landings with near zero bycatch on an albacore stock that is not overfished. The fleet capacity and number of vessels remain stable. In the past ten years, very few new albacore vessels have entered the fishery, while many have been lost due to attrition. No younger persons are entering the fishery mainly because of low ex-vessel prices for albacore and increasing operating costs. The U.S. albacore troll fishery does have room for some expansion if the market changes. The U.S. west coast albacore fleet is in a good position to supply markets that demand sustainable, nutritious seafood products. At one time this fleet sold nearly 100% of the catch to the major U.S. canners, but in recent years over two-thirds has been sold to Europe and Asia in high-end canned and sashimi markets. Potential for this to grow into the U.S. consumer market looks positive with public attitudes changing toward sustainable and good tasting healthful albacore and other seafood. U.S. custom boutique canners are increasing in number, as well as the availability of high-quality frozen and fresh loins and steaks, which all feed into increased consumer demand.

Pacific Islands Forum Fisheries Agency Pre-Assessment of WCPO Tuna Fisheries against the Marine Stewardship Council Principles and Criteria

Mr. Len Rodwell, Pacific Islands Forum Fisheries Agency and
Dr. Tim Adams, Secretariat of the Pacific Community

With the entry into force of the Western and Central Pacific Fisheries Convention and the introduction of the ecosystem approach to fisheries management by FFA members, the western and central Pacific tuna fishery is entering into a new phase of enhanced sustainable fisheries management at both the regional and national level.

In addition, steps are being taken in major markets to promote the supply of fish from certified sustainable fisheries. For example, in 2006, the US's leading supermarket, Wal-Mart announced that over the next 3 – 5 years, all of its wild-caught seafood would be purchased from fisheries that have been certified as sustainable by the Marine Stewardship Council (MSC). MSC certification is an environmental standard (eco-label) used to promote seafood that comes from sustainable, well-managed fisheries.

MSC has indicated that there is significant unmet global demand for MSC certified tuna products and certified tuna is one of its strategic priorities. Hence, it is timely to investigate MSC Certification for the western and central Pacific tuna fishery for use as a potential marketing tool, noting that interest has been expressed in MSC-labelled products from the Pacific by other major retailers in marine products.

The Forum Fisheries Agency with funding assistance from the Sustainable Fisheries fund has conducted a pre-assessment of the western and central Pacific tuna fishery against the MSC principles and criteria. This is the first multi-species, multi-gear, multi-jurisdictional fishery to undergo an MSC pre-assessment. The outcome of the pre-assessment was as follows:

- a) *Fisheries considered ready for immediate full assessment:*
 - Temperate albacore longline fisheries (PIC flagged vessels); and
 - Solomon Islands pole and line skipjack fishery.

- b) *Fisheries with certification potential over the medium term (i.e. requiring attention to a number of issues before moving to an assessment for full certification):*
 - Purse seine fisheries on unassociated free schools; and
 - The entire southern albacore longline fleet.

- c) *Fisheries presenting significant difficulties for certification over the longer term (i.e. not considered to be sufficiently close to being in a condition suitable for certification at this time):*
 - Individual PICs EEZ fishing on unassociated free schools (entire purse seine fleet including domestic and foreign vessels);
 - Purse seine fisheries using mixed unassociated and FAD fishing;
 - Individual PICs fleet tropical longline fisheries; and
 - Individual PICs EEZ (entire fleet) tropical longline fisheries.

Food and Agriculture Organization of the United Nations Eco-labeling Guidelines, Code of Conduct for Responsible Fisheries, and FAO Next Steps in Response to Retail Industry Demand for Practical Sustainability Standards

Dr. Grimur Valdimarsson, Food and Agriculture Organization of the United Nations

Eco-certification trends:

Eco-certification of fisheries continues to gather momentum with a steady flow of new initiatives announced over the past year. Most developments are currently taking place in developed countries, notably in Europe, the USA and Australasia notwithstanding, a number of recent initiatives to help facilitate certification in developing countries.

NGO's remain at the forefront in influencing the agenda regarding sustainability issues with, for example, eco rankings by Greenpeace of retail chains in several countries. In terms of

certification and consumer eco-labels, the Marine Stewardship Council (MSC) maintains a strong public profile, with over fifty fisheries worldwide either certified or being assessed for certification. The MSC label is also increasingly evident on supermarket shelves even if, in terms of total seafood product numbers, coverage remains relatively marginal in many major seafood markets. Current MSC initiatives in the French seafood market will prove a significant test for eco-label schemes in key Mediterranean seafood markets. An alternative to MSC is the Italian based, Friend of the Sea, which certifies aquaculture products in addition to wild species and which has made some progress with its own consumer label in Italy.

With increasing recognition of the importance of sustainability issues in trade and marketing terms, the situation regarding fisheries certification and eco-labels remains dynamic, with key industry players responding in a variety of ways to these issues. Major grocery retailers are now actively committed to the idea of sustainability and certification processes. Retailers' approach to sustainability issues is eclectic, with individual chains relying on a variety of tools to demonstrate their green credentials. In addition to carrying a range of independently certified products (MSC), Carrefour, Europe's largest chain, has also been actively involved in the eco-branding processes regarding a number of products such as Icelandic cod. In the USA, the Dutch group, Ahold, works with the New England Aquarium on the Choice Catch programme for which the Aquarium audits seafood sources for environmental impact.

While sustainability issues and eco-certification in fisheries are likely to remain key agenda items in seafood markets for the foreseeable future, questions remain regarding the future course of the seafood industry's response. Consumer awareness and active interest in sustainability are likely to be crucial for development of eco-labels. Without the necessary consumer interest, translated into a price premium for labeled products, retailers may focus solely on certification, in theory a cheaper course. Economic parameters such as a recessionary and/or inflationary environment are likely to influence this outcome.

Eco-labeling guidelines:

Recently there have been calls for the establishment of some kind of minimum environmental standards, as a response to the growing number of certification schemes that aspire to supply the market with sustainably-sourced seafood.

A key document in this respect is the FAO Guidelines for the Eco-labelling of Fish and Fishery Products from Marine Capture Fisheries, which was approved by the Food and Agriculture Organization of the United Nations Committee on Fisheries in 2005 (similar guidelines for Inland Capture Fisheries are under preparation). These Guidelines basically deal with the institutional and procedural arrangements for awarding and maintaining an eco-label and what the minimum substantive requirements and criteria for eco-labels should be. The former addresses 1) the setting of certification standards; 2) the accreditation of independent certifying bodies; and 3) certification that a fishery conforms to the standard and that a chain of custody is established.

As regards the minimum requirements, the Guidelines specify these in the areas of: 1) fisheries management systems; 2) the stock under consideration; and 3) the impact of fishing on the ecosystem.

Recently an FAO Expert Consultation produced recommendations on how these basic "requirements" of the approved Guidelines could be made more specific and functional.

Some of the suggestions by the Experts were as follows:

- It was suggested that the minimum substantive criteria should be separately developed for inland capture fisheries and marine capture fisheries.
- It was recognized that enhancement fisheries is common in inland fisheries and is increasingly being used in marine fisheries. These range from no enhancement in pure capture fisheries to highly-controlled aquaculture systems.

- No agreement was reached on the boundary when a fishery should cease to be considered solely a capture fishery.

As for minimum substantive criteria, it was suggested not to attempt to distinguish between small-scale and large-scale fisheries, but to develop criteria that will allow sustainable fisheries to be certified regardless of their scale.

Management systems:

- The system is based on good practices.
- A documented management approach takes uncertainty and imprecision into account.
- Adequate data and/or information are collected. This includes relevant traditional fisher or community knowledge, provided its validity can be objectively verified.

Stocks under consideration:

- Not over-fished. Their availability should be maintained for present and future generations.
- The stock is not considered to be over-fished if it is above the limit reference point.
- If over-fished, action must be taken to decrease fishing mortality.
- In the absence of specific information, generic evidence on similar stocks with low risk can be used.

Ecosystem considerations:

- Adverse impacts of fishing on the ecosystem should be assessed and addressed.
- Non-target catches to be monitored so as not to threaten them with serious risk of extinction.
- Avoid severe adverse impacts on dependent predators.
- Damage by fishing gear on highly vulnerable habitats to be avoided, minimized or mitigated.

The above issues and their implications for future work will be discussed in the presentation.

FACT SHEET ON COMMERCIAL TUNA FISHERIES

Excerpt from Gilman E and Lundin C. 2008 (in progress). Principles and Methods to Minimize Bycatch of Sensitive Species Groups in Marine Capture Fisheries: Lessons from Commercial Tuna Fisheries. In Grafton Q, Hillborn R, Squires D, Tait M, Williams M (Eds.). *Handbook of Marine Fisheries Conservation and Management*. Oxford University Press.

- **Economic Importance:** Tunas and tuna-like species (true tunas, billfishes, and other tuna-like species) are an important food source, used mostly for canning and *sashimi*, and, due to their high economic value and extensive international trade, are an important global commodity. The export value of tuna products is about US\$5 billion. The value of global tuna products is 9% of total global fish trade.
- **Capture of tunas:** Demand for canned and fresh tuna has been rapidly and steadily increasing: the reported catches of the principal market species of tunas increased from less than 0.2 million tonnes in the early 1950s to a peak of 4.3 million tonnes in 2003. Purse seine, pelagic longline and pole-and-line fisheries are the primary commercial fishing methods for catching tunas. Purse seine fisheries catch about 58%, longline 15%, pole-and-line 14%, 'other' gears (coastal artisanal gillnet, handline, etc.) 13%, and troll <1% of the total combined weight of global landings of the principal market species of tunas. Longline vessels generally catch older age classes of bigeye and bluefin tunas for the fresh fish market, while purse seine vessels catch younger age classes of target skipjack and yellowfin and incidental bigeye tunas. Like purse seiners, pole-and-line vessels catch fish close to the surface, catching mostly skipjack and small/juvenile yellowfin, albacore, and bluefin, and most of the catches are canned. There are several major countries catching tuna. The top four contributors to the 2002 tuna catch were Japan (550,000 tonnes, 18% of total global reported tuna landings), Indonesia (500,000 tonnes, 16% of total), Taiwan (460,000 tonnes, 15% of total), and the combined European Union member states (445,000 tonnes, 14% of total).
- **Tuna consumption:** In 2005, 82% of tuna was consumed as canned product, 18% as fresh product (including as *sashimi*). Japan consumed 78% of the fresh tuna. In 2004, canned tuna consumption was highest in the European Union (734,444 tonnes) followed by the U.S. (445,847 tonnes), combined accounting for 83% of the total global consumption of canned tuna.
- **Status of tuna stocks:** Despite their high fecundity, most tuna stocks are fully exploited, and some are overfished or even depleted (all yellowfin, bigeye and bluefin stocks are fully or overexploited, some albacore stocks are overexploited). It is unlikely that the major tuna species can sustain greater catches. Even for the few remaining tuna stocks that are only moderately exploited (albacore in the south Atlantic and south Pacific, skipjack in the Pacific and Indian oceans), increased catches would not be sustainable because tunas of stocks that are fully/overexploited are caught together. Despite efforts by the five regional fisheries management organizations (through limited entry and catch quotas), there has been continued growth of tuna fleets and concomitant increased tuna fishing mortality, biological overfishing, stock declines, and fishing overcapacity.
- **Bycatch:** Bycatch of sensitive species groups, including sea turtles, seabirds, marine mammals and sharks, in purse seine and pelagic longline fisheries, and bycatch of juvenile and undersized tunas in purse seine fisheries, is problematic. There has been substantial progress to minimize direct mortality of dolphins in Eastern Pacific purse seine fisheries (despite dolphin conservation measures, dolphin populations have not been recovering at expected rates, perhaps because the stress on dolphins from having purse sets made on them causes miscarriages or separation and loss of dolphin calves), and identify effective methods to minimize seabird and sea turtle bycatch in pelagic longline fisheries. There has been relatively little progress to resolve the bycatch of sharks and whales in both longline and purse seine fisheries, sea turtles in purse seine fisheries, and juvenile/undersized tunas in purse seine fisheries. Relative to longline and purse seine fisheries, there are extremely low bycatch levels associated with pole-and-line fisheries, where there is some bycatch of juvenile kawakawa tuna, frigate mackerel, mahimahi, and rainbow runner, and discards have high post release survival rates due to the use of barbless hooks and flick-off practices.

Sustainable Tuna Roundtable

Participants List

Dr. Tim Adams
Secretariat of the Pacific Community
BP D5, 98848
Noumea Cedex
95 Promenade Roger Laroque, Anse Vata
New Caledonia
TimA@spc.int

Stephen Akester
Macalister-Elliott
stephen.akester@macalister-elliott.com

Alejandro Anganuzzi
Executive Secretary
Indian Ocean Tuna Commission
P.O.Box 1011, Seychelles
alejandro.anganuzzi@iotc.org

Carrie Brownstein
Whole Foods Market
550 Bowie Street
Austin, Texas 78703 U.S.A.
Carrie.Brownstein@wholefoods.com

Henk Brus
Atuna
14D Meerpaal
Oosterhout
4904 SK NETHERLANDS
henkbrus@atuna.com

Lucy Pelham Burn
New England Seafood International Limited
48 Cox Lane
Chessington Industrial Estate
Chessington
Surrey KT9 1TW
lucy@neseafood.com

Mr. George Chiu
Luen Thai Fishing Venture Ltd. (Far East
Region)
5/F Nanyang Plaza, 57 Hung To Road
Kwun Tong, Kowloon, Hong Kong
Gchiu1@aol.com

Dr. Guillermo Compean
Inter-American Tropical Tuna Commission
8604 La Jolla Shores Drive
La Jolla CA 92037-1508 USA
gcompean@iattc.org

Jim Cook
Hawaii Longline Association
1133 N. Nimitz Hwy
Honolulu, HI 96817
jim@pop-hawaii.com

Paul Dalzell
Western Pacific Regional Fishery Mgmt Council
1164 Bishop Street, suite 1400
Honolulu, HI 96813 USA
Paul.dalzell@noaa.gov

Bill Dubin
Whole Foods Market
550 Bowie Street
Austin, Texas 78703
Bill.dubin@wholefoods.com

Nigel Edwards
Seachill (Division of Icelandic Group UK Ltd)
Laforey Rd
Great Grimsby Business Park
Grimsby
North East Lincolnshire
UK DN37 9TG
nigeledwards@seachill.co.uk

Markus Fehr
Migros (MICARNA SA)
Pfungstweidstrasse 101
CH-8021 Zürich
markus.fehr@micarna.ch

Eric Gilman
Global Marine Programme
IUCN
2718 Napuaa Place
Honolulu, HI 96822 USA
eric.gilman@iucn.org

Dr. Michel Goujon
Organisation Des Producteurs de Thon Congele
(Orthongel)
11bis rue des Sardiniers
29900 Concarneau, FRANCE
orthongel@wanadoo.fr

Peter Hajipieris
UK Policy Manager - Seafood
Tesco Stores Ltd
New Tesco House, Floor 3 Pillar F
Delamare Road, Cheshunt
Hertfordshire, UK EN8 9SL UK
peter.hajipieris@uk.tesco.com

Dr. Jon Harman
Sea Fish Industry Authority
18 Logie Mill,
Edinburgh
EH7 4HG UK
j_harman@seafish.co.uk

Wayne Heikkila
Executive Director
Western Fishboat Owners Association
P.O. Box 992723
Redding, CA 96099 USA
wfoa@charter.net

Jesper Hojer
Lidl Stiftung & CO. KG
StiftsbergstraBe 1
74167 Neckarsulm GERMANY
ek_food@lidl.com; Tanja.Muehlbeyer@lidl.com

Charles Hufflett
Pacific Islands Industry Tuna Association
P.O. Box 5041
Port Nelson 7030 NEW ZEALAND
cch@solander.co.nz

Bill Lart
Sea Fish Industry Authority
St Andrews Dock
Hull
HU3 4QE UK
W_Lart@seafish.co.uk

Chris Lischewski
President and CEO
Connors Bros Ltd
Parent company of Bumble Bee Foods LLC
(U.S.) and Clover Leaf Seafoods LP (Canada)
Chris.Lischewski@bumblebee.com

Carl Gustaf Lundin
Global Marine Programme
IUCN
Gland, SWITZERLAND
Carl.lundin@iucn.org

Julio Morón
OPAGAC (Organización de Profesional de
Grandes Atuneros Congeladores)
c/ Ayala 54, 2ºC
28001 Madrid SPAIN
opagac@arrakis.es

David Pilat
Whole Foods Market
550 Bowie Street
Austin, Texas 78703 USA
david.pilat@wholefoods.com

Despina Symons Pirovolidou
IUCN
Despina.symons@ebcd.org

Melissa Pritchard
Fisheries Policy Officer
Marine Conservation Society
Unit 3, Wolf Business Park
Alton Road, Ross-on-Wye
HR9 5NB ENGLAND
melissa.pritchard@mcsuk.org

Len Rodwell
Pacific Islands Forum Fisheries Agency
PO Box 629 Honiara SOLOMON ISLANDS
Len.rodwell@ffa.int

Dr. Cathy Roheim
University of Rhode Island
Department of Environmental and Natural
Resource Economics
Room 214 Kingston Coastal Institute
1 Greenhouse Road
Kingston, RI 02881 USA
crw@uri.edu

Philippe Gourel de Saint Pern
MW Brands, FRANCE
Philippe.SaintPern@mwbrands.com

Ibrahim Shareef Mohamed
Maldive Marine Products
Plot M1 12-14 Hulhumale' Industrial Area
Republic of Maldives
Ibrahim.shareef@maldivemarine.com

François Simard
Advisor on Fisheries and Maritime Affairs
IUCN Center for Mediterranean Cooperation
IUCN Global Marine Programme
Francois.simard@iucn.org

Kitty Simonds
Western Pacific Regional Fishery Management
Council
1164 Bishop Street, suite 1400
Honolulu, HI 96813 USA
Kitty.simonds@noaa.gov

Randi Parks Thomas
National Fisheries Institute
7918 Jones Branch Drive, Suite 700
McLean, VA 22102 USA
RThomas@nfi.org

Dr. Grimur Valdimarsson, Director
Fisheries Industry Division, Fisheries
Department
Food and Agriculture Organization
of the United Nations
Viale delle Terme di Caracalla
00100 Rome, ITALY
Grimur.valdimarsson@fao.org

Robert Wölken
Lidl Stiftung & CO. KG
Stiftsbergstraße 1
74167 Neckarsulm GERMANY
ek_food@lidl.com

Moosa Zameer
Maldivian Marine Products
Plot M1 12-14 Hulhumale' Industrial Area
Republic of Maldives
Moosa.zameer@maldivemarine.com