

*WHAT ARE THE MARKET IMPLICATIONS OF EFFECTIVE CHANGES IN
FISHERIES MANAGEMENT?
THE NORTH ATLANTIC PELAGIC CASE STUDY*

NASF JUNE 2022



Agenda

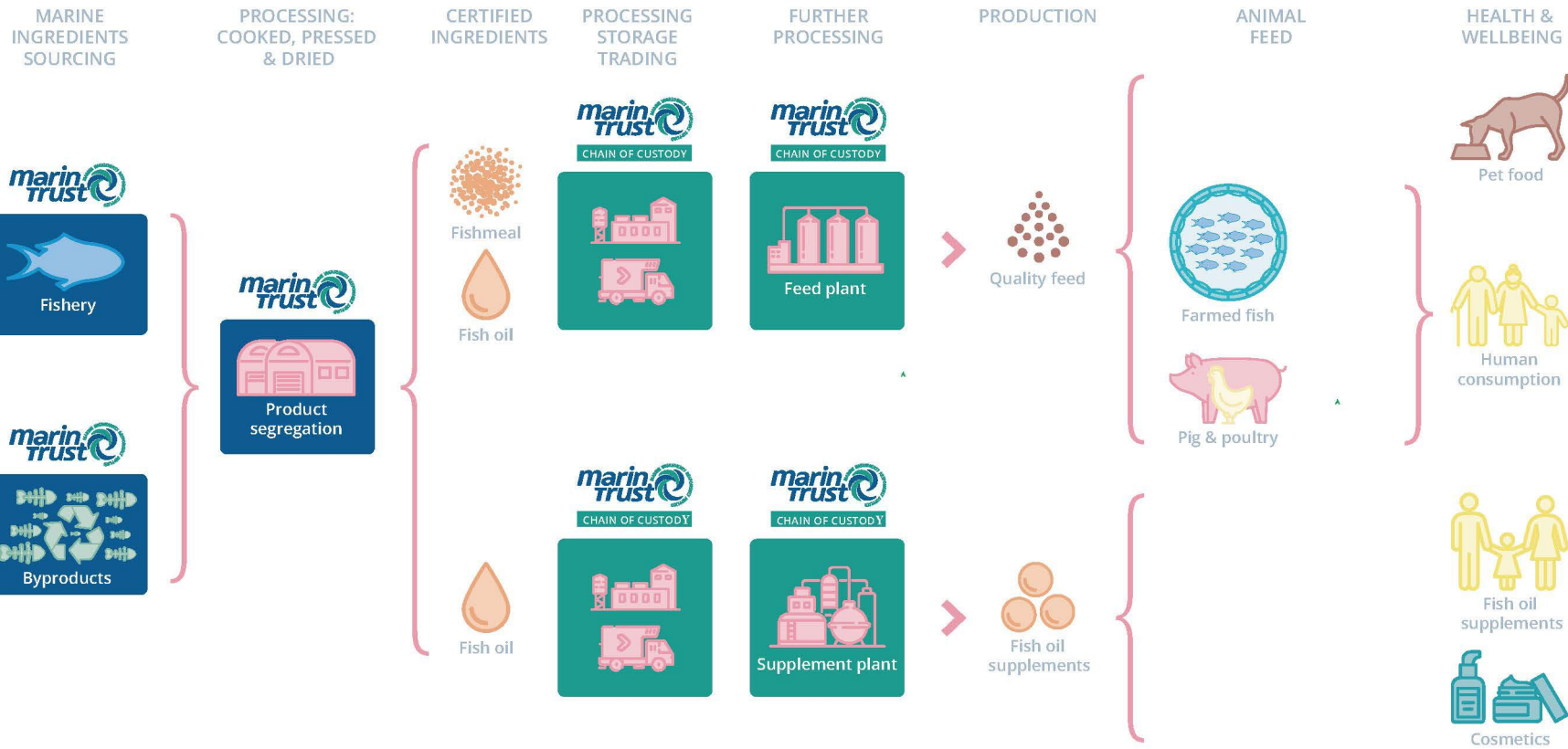


- MarinTrust Standard summary
- MarinTrust Improver Programme
 - What it is
 - Supply chain position
 - Global reach
 - Recognition
 - Visibility
- NAPA Case Study – **on behalf of NAPA Secretariat**
 - Issue
 - Consequence
 - Solution?

MarinTrust Standard



INDEPENDENT STANDARDS VALUE CHAIN

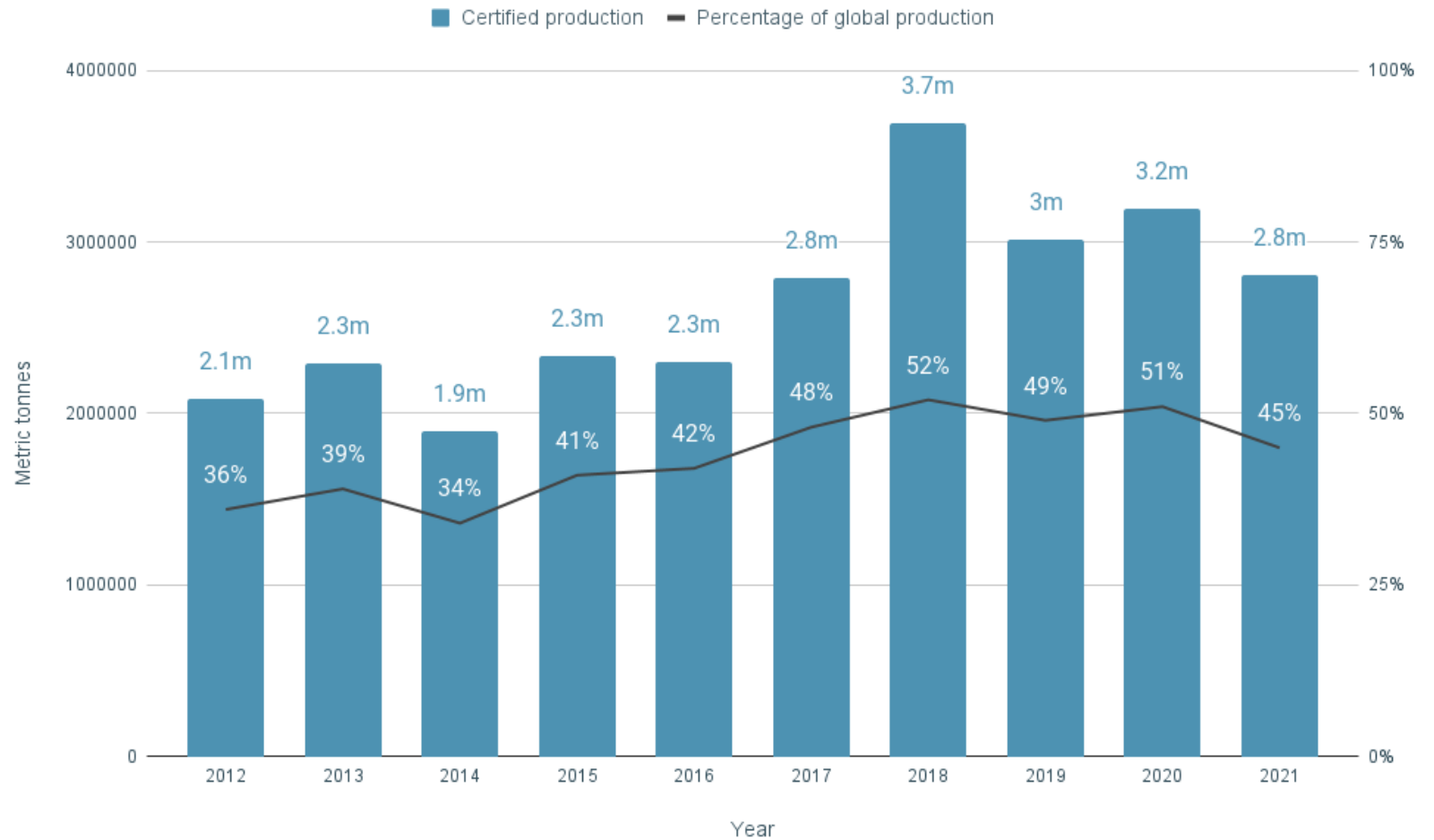


TRACEABILITY TO SOURCE; RESPONSIBLY SOURCED & PRODUCED

2021 certified production



- *MarinTrust still holds the biggest share of the marine ingredients certification market with 45% of the world's production certified to MarinTrust (this figure would be in excess of 53% if blue whiting approval had not been lost),*
- There are currently 160 certified sites in 22 countries
- There are also 83 Chain of Custody certified sites in 18 countries



Source: MarinTrust, March 2022

MarinTrust Improver Programme

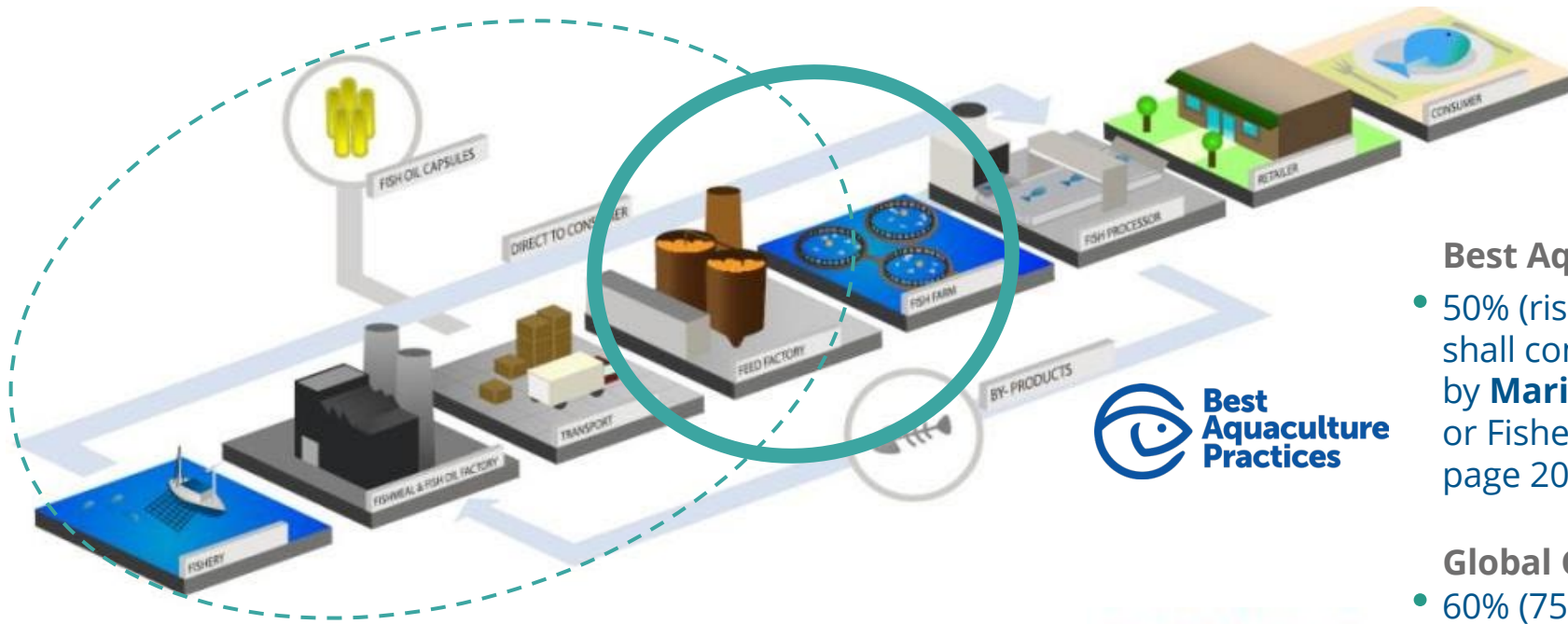
- An organised programme developed to enable factories not yet meeting the criteria for the MarinTrust Standard, due for example, to a lack of fisheries management to work towards approval for certification along a structured and time-bound pathway
- Enables recognition for consistent progress made towards achieving MarinTrust approval.
 - Recognised by other standards in the Marine Ingredients Supply Chain.
- This process uses the Fishery Improvement Project (FIP) structure following CASS guidelines.
- It also requires production sites to pass a MarinTrust site audit as this is the unit of certification for the standard



Recognition by other standards



MarinTrust IP



GLOBALG.A.P.



Best Aquaculture Practices:

- 50% (rising to 75% by June 2025) of marine ingredients shall come from MSC/MarinTrust or FIPs as recognised by **MarinTrust Improver Programme (IP)**, FishSource or Fishery Progress. Ref, Feed Mill standard Issue 3.1, page 20.


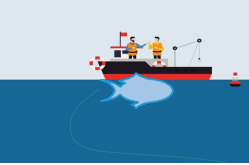








Global GAP:

- 60% (75% from 2025) of MI shall come from GSSI recognised schemes or accepted under the **MarinTrust programme** and/or FIPs listed on FisheryProgress or equivalent.

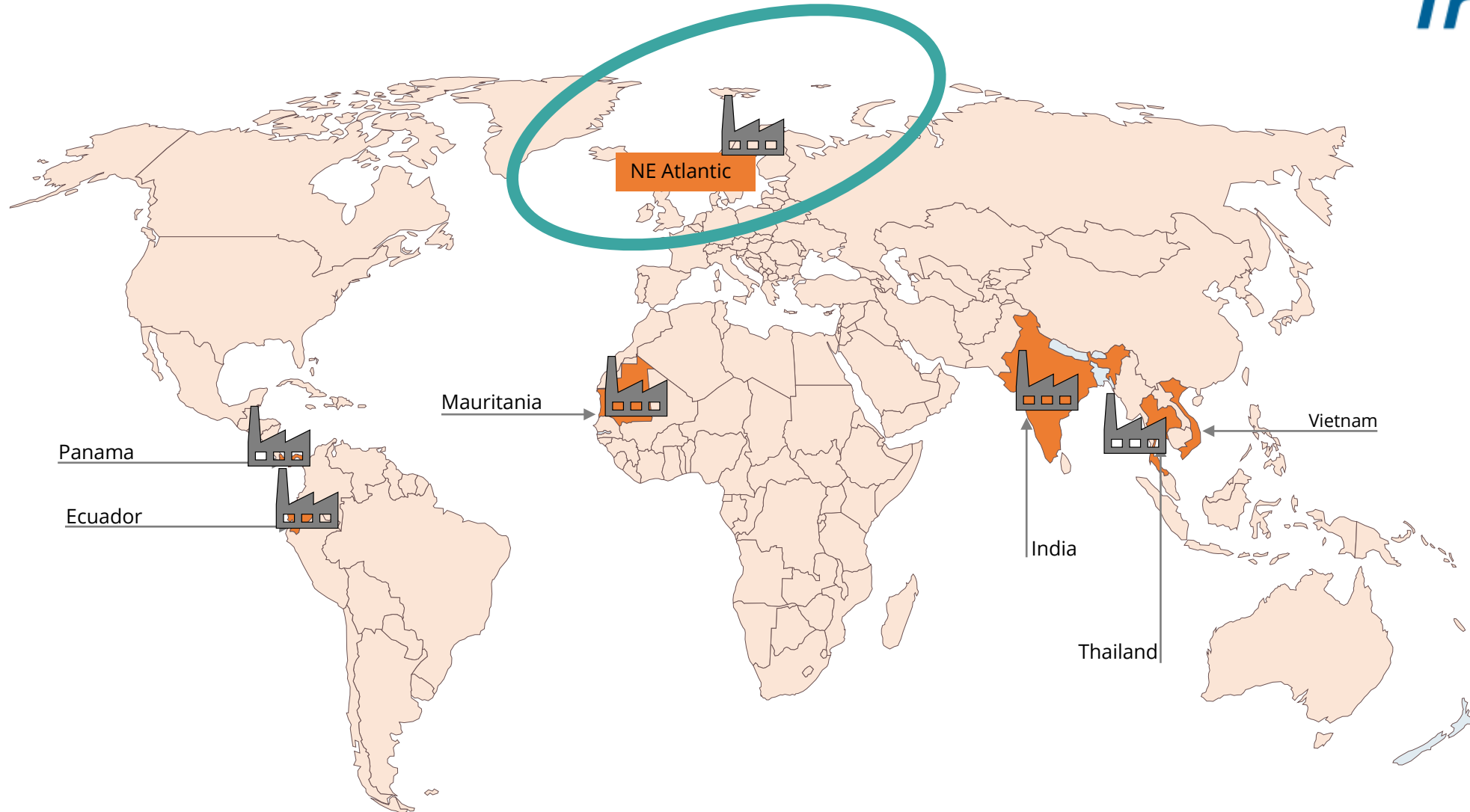
Aquaculture Stewardship Council (ASC):

- Level 1 (IP MarinTrust and FisheryProgress).

Fishery Improvement Projects (FIPs) recognition

BENCHMARK PROGRAMME FOR THE FIP	FISHERY	PROCESSING OF RAW MATERIALS AT THE FISHMEAL / FISH OIL PLANT	FURTHER PROCESSING TRADING	PROCESSING FOR USAGE IN FEEDS
	 <p>Accepted into the MarinTrust Improver Programme</p>	 <p>RECOGNISED as FIP material following MarinTrust audit Can make the claim to be Improver Programme accepted</p>	 <p>RECOGNISED as FIP material following MarinTrust audit Can make the claim to be Improver Programme accepted</p>	 <p>RECOGNISED as Improver Programme material following Chain of Custody audit at the trading stage</p>
 <p>Uses MSC as a benchmark</p> 	<p>Accepted into Fishery Progress</p>	 <p>NOT LISTED as sourced in a FIP</p>	 <p>Requires “due diligence” to ensure traceability</p>	 <p>Requires “due diligence” to ensure traceability</p>

MarinTrust Improver Programme global reach



[HOME](#) / [NE ATLANTIC BLUE WHITING FIP](#)

NE Atlantic Blue Whiting FIP

Objectives:

Achieve MarinTrust certification for marine ingredient production sites by 2023 (MarinTrust approval of whole fish raw material)

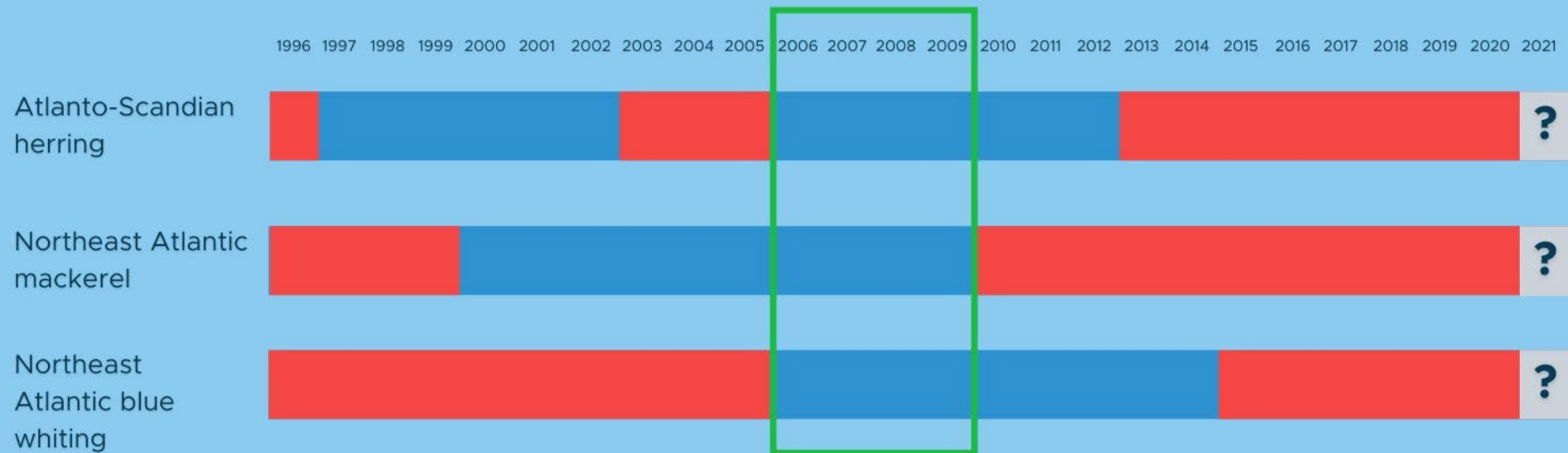


Description: Established in June 2020, NAPA is a market-led approach working to improve North Atlantic pelagic fisheries management. It was formed in response to the continuing dispute over pelagic fishery quota allocations in the North East Atlantic. Over time, this dispute has resulted in annual catches well in excess of the advised level for three commercially important species: North East Atlantic mackerel, Atlanto-scandian (Norwegian Spring Spawning) herring, and North East Atlantic blue whiting.

*NORTH ATLANTIC PELAGIC ADVISORY
GROUP (NAPA) – A CASE STUDY*



Period of Coastal States (dis) agreements

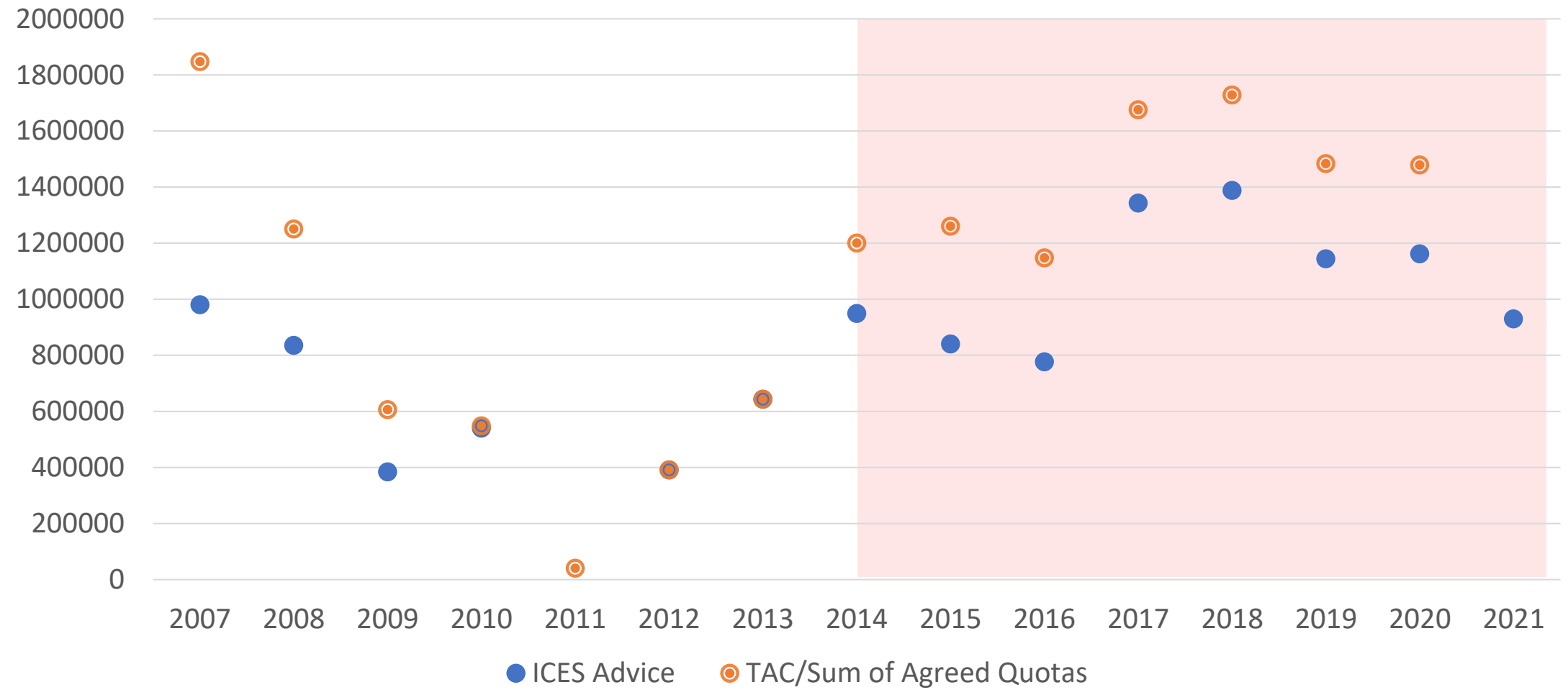


THERE HAVE BEEN JUST **FOUR YEARS (2006-2009) IN WHICH ALL COASTAL STATES AGREED ON MANAGEMENT FOR PELAGIC STOCKS.**

#CountdowntoCoastalStates

What is the Issue with Blue Whiting?

Blue Whiting



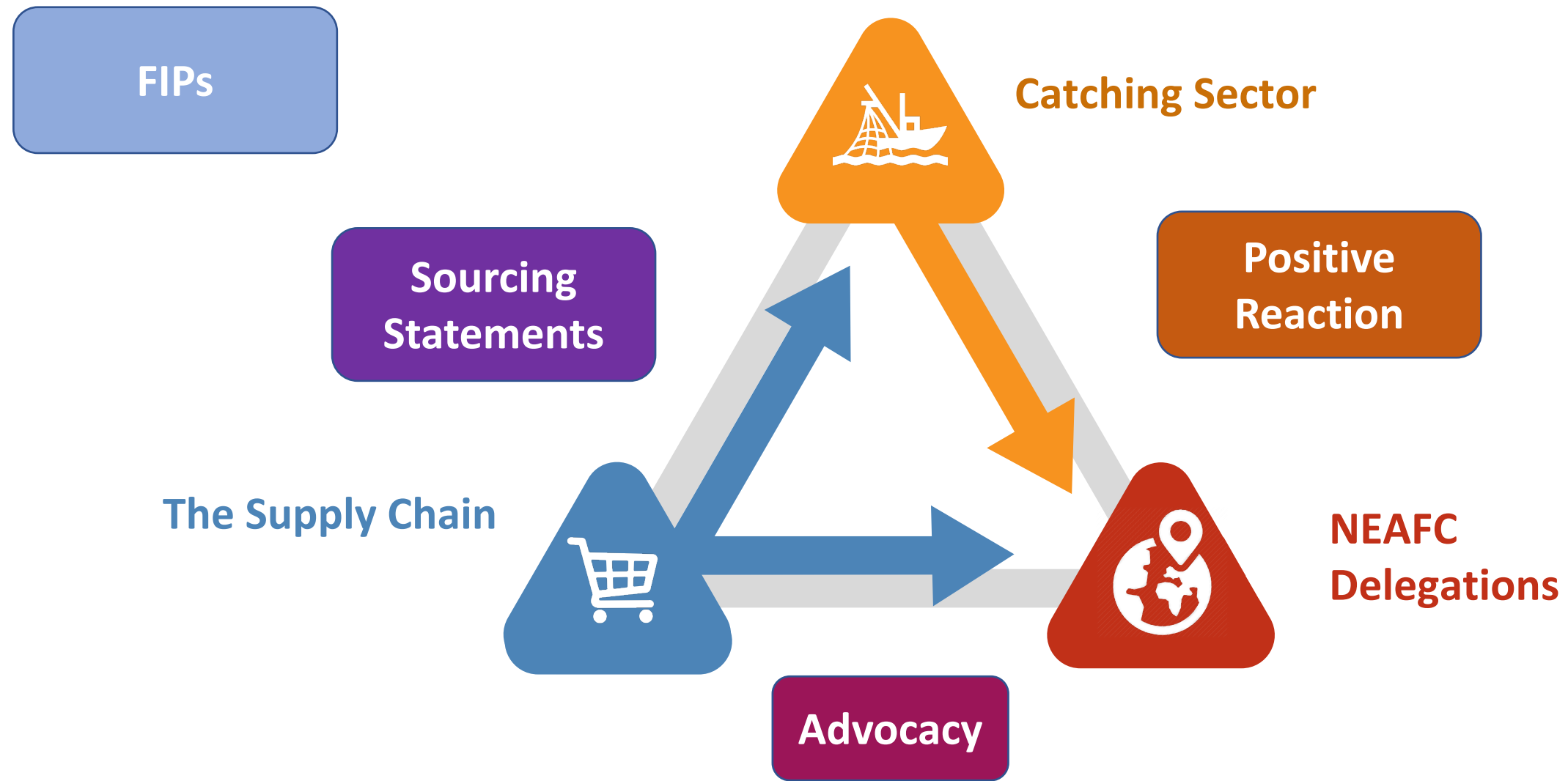
What was the consequence?

MSC certificates to be suspended for all Atlanto-Scandic herring, blue whiting fisheries

By [Neil Ramsden](#) Dec. 1, 2020 13:47 GMT



What is the proposed solution?



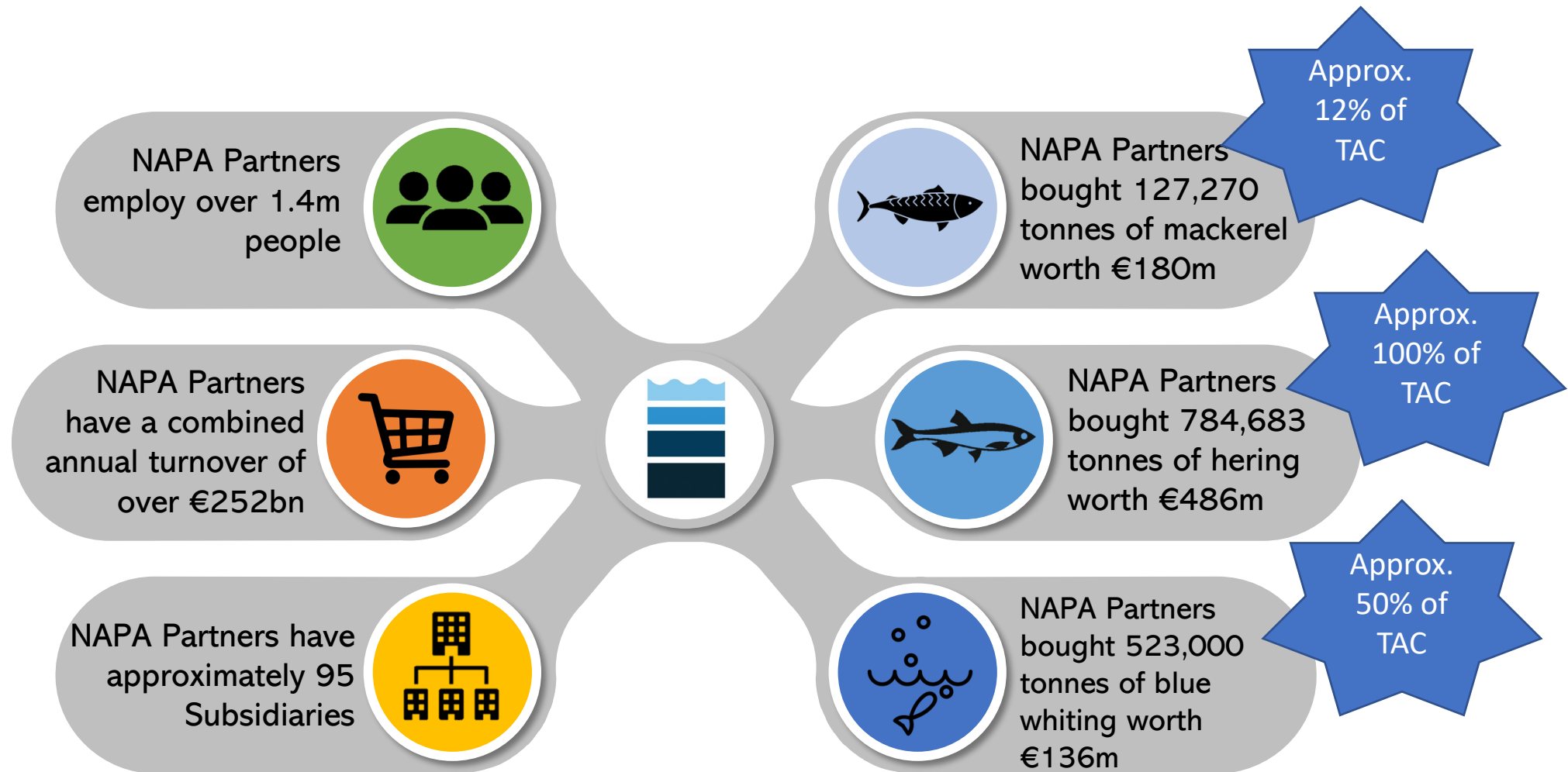
Supply Chain

PRICES
ASDA
M&S EST. 1984
Ahold Delhaize
flatfish THE FUTURE OF TROPICAL OCEAN PRODUCE
northeast nutrition
FRISENKRONE Aus Loh- zum Fisch
Simplot
TESCO
Waitrose
Morrisons Since 1899
CO OP
HILTON SEAFOOD UK
Scottish Sea Farms
Groupe Gendreau L'imagination en boîte
OCEAN BRANDS
LABEYRIE FINE FOODS
ALDI
Holtermann
BioMar
TripleNine 999
HOFSETH AQUA
Icewind
BOLTON GROUP
dawnfresh
Sainsbury's
Aquascot
Cargill
W WOOLWORTHS
LA DORJA
MQWI
ROACH BROS Est. 1907
INTERNATIONAL FISH CANNERS Premium Quality Canned Seafood NOR-SEA FOODS LTD The Smoked Fish Specialists
Young's
NEW ENGLAND SEAFOOD
SKRETTING a Nutreco company
Karmsund Protein
ASSOCIATED SEAFOODS
Sywan aus Mollusken seit 1901 SCHWAANER FISCHWAREN GMBH
ISLAND SEAFOODS LIMITED
INTERFISH Ltd
SAEBY
HAYSBRÚN
falfish
JAPANESE CONSUMER CO-OPERATIVE UNION
CO-OP
bii BIO-MARINE INGREDIENTS IRELAND
Orkla
KARAVELA
Appel
ALDI
Arctic Seafood
Thai Union
FF SKAGEN DENMARK
SCANDIC PELAGIC

Trade

BRC
ptf PROVISION TRADE FEDERATION
BOLTON GROUP
FR Fiskbranschens Riksförbund
EUROPEAN FISHMEAL AND FISH OIL PRODUCERS
EuroCommerce for retail & wholesale

Scale of NAPA (2020)



Advocacy – NAPA’s Asks of Coastal States



1. Address Allocations

Contracting parties should prioritise resolving the allocation issues around these stocks and reestablish the NEAFC WG on Allocation as a first step. Consider a formal dispute resolution mechanism.



2. Follow the Advice

Regarding multilateral NEAFC coastal states negotiations on large pelagic stocks (mackerel, herring and blue whiting), the contracting parties should ensure that the overall catch for each stock does not exceed scientific advice.



3. Management Plans

Multi-annual management should be the underlying approach by default. That includes stable sharing arrangements and harvest strategies that include precautionary harvest control rules for setting catch limits, a periodic review process, and any necessary mechanisms to transition from previous arrangements to a new system.

FIP at a glance
North Atlantic Pelagic Advocacy Group (NAPA)

More details on the MarinTrust Improver Programme can be found [here](#)

NE Atlantic FAO 27 Subareas 1-9, 12, & 14

Species
Blue whiting *Micromesistius poutassou*

Gear type
Purse seine

Please see MOU for full list of companies

- WWF
- Sustainable Fisheries Partnership
- Client Earth (Sustainable Seafood Coalition)

*Production sites are not listed here. To check which sites have been accepted onto the Improver Programme please check the Accepted Sites page [here](#).

FIP Progress

Initial application → Year 1 → Year 2 → Year 3 → Full application

Identifies year of action plan progress. For more details, please see the FIP evidence docs.

For more information, please contact MarinTrust at standards@marin-trust.com

"After a review of the documents provided I can confirm that the North Atlantic Blue whiting FIP has passed the 6-month validation check."

“The recent development of a Policy FIP to address the misalignment of TACs resulting in the loss of MSC certification for some fisheries, is an excellent example of industry collaboration”

The collage features three main elements:

- EXPO TODAY:** The cover of the official expo publication, dated August 2018, featuring a bowl of seafood salad and the headline "BACK TO BOSTON" with subtext "INDUSTRY REUNION IN PERSON AT AMERICA'S LARGEST SEAFOOD EXPO".
- SEAFOOD2030:** A report cover titled "TOP CHALLENGES FACING SUSTAINABLE SEAFOOD" with a background image of a fisherman on a boat.
- Wild Caught:** An advertisement for Wild Caught seafood products, showing various packaged items like salmon and shrimp.

Text from the SEAFOOD2030 report:

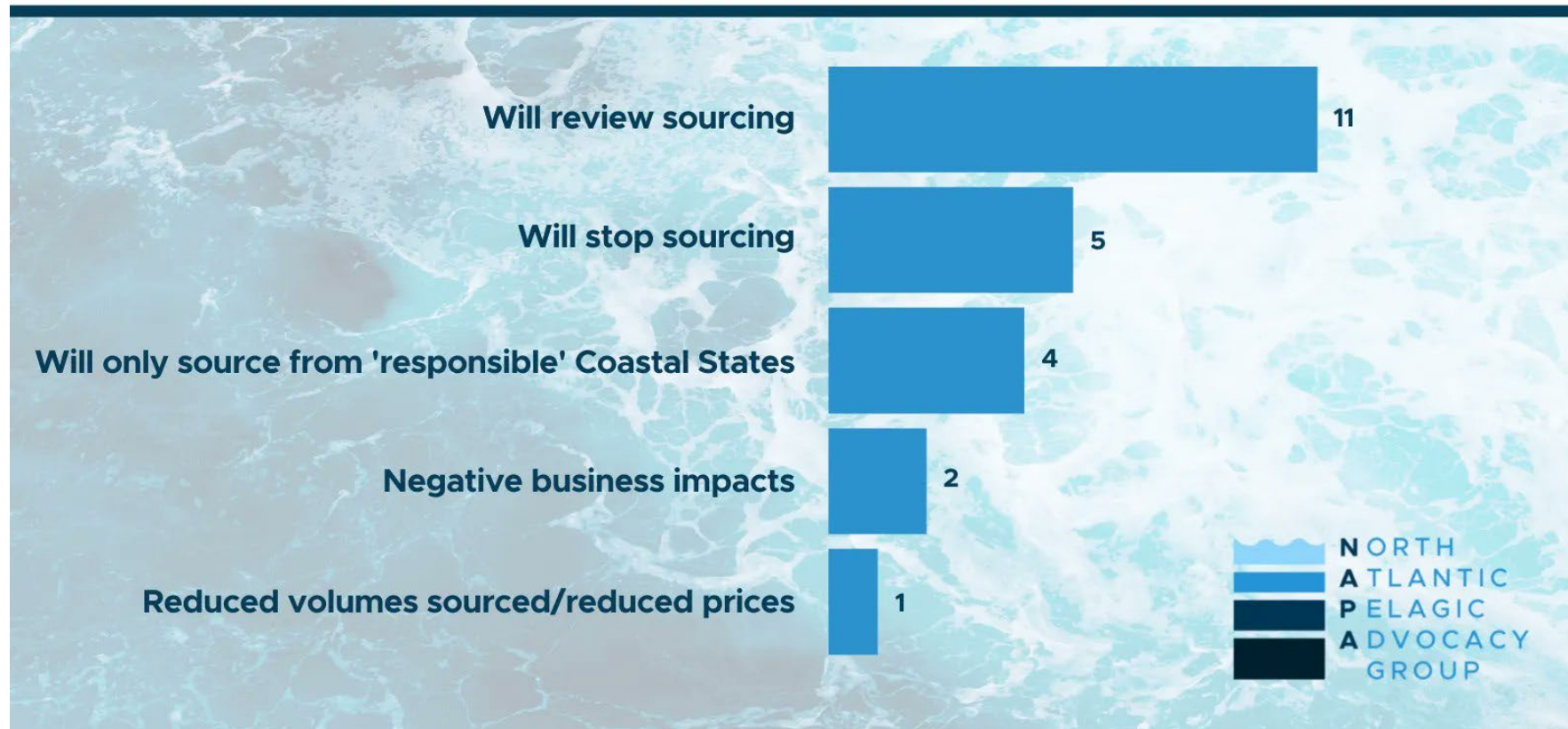
There is a striking similarity between the effort required to run a seafood business and the work that needs to be done to make the industry at large more sustainable.

As the industry moves forward, it is essential to have a clear understanding of the challenges facing the sector. This report provides a comprehensive overview of the top challenges facing sustainable seafood, including:

- Climate Change
- Overfishing
- Illegal, Unreported and Unregulated (IUU) Fishing
- Bycatch
- Food Safety
- Traceability
- Consumer Awareness
- Market Access
- Policy and Regulation
- Research and Innovation
- Collaboration

44 | SEAFOOD2030: CHALLENGES TO SUSTAINABLE SEAFOOD

SOURCING STATEMENTS



Market Consequences of Inaction



The Guardian 
@guardian



Stop overfishing or we'll buy elsewhere, top UK fish firm warns European states



theguardian.com

Stop overfishing or we'll buy elsewhere, top UK fish firm warns European states
Young's Seafood joins calls for sustainable quotas of mackerel, herring and blue whiting to be agreed in line with scientific advice

In conclusion



- Although many global fisheries are well managed, improvements to fisheries are needed still all over the World.
- Credible Improver Programmes, driven by industry stakeholders, including the marine ingredient and pelagic fisheries sector, can drive change in fisheries management – an example of this is the Panama FIP, where industry pressure resulted in the Panamanian Government enacting new fisheries legislation. The applicants are now in the process of receiving full certification.
- Europe is leading by example!

Thank you

