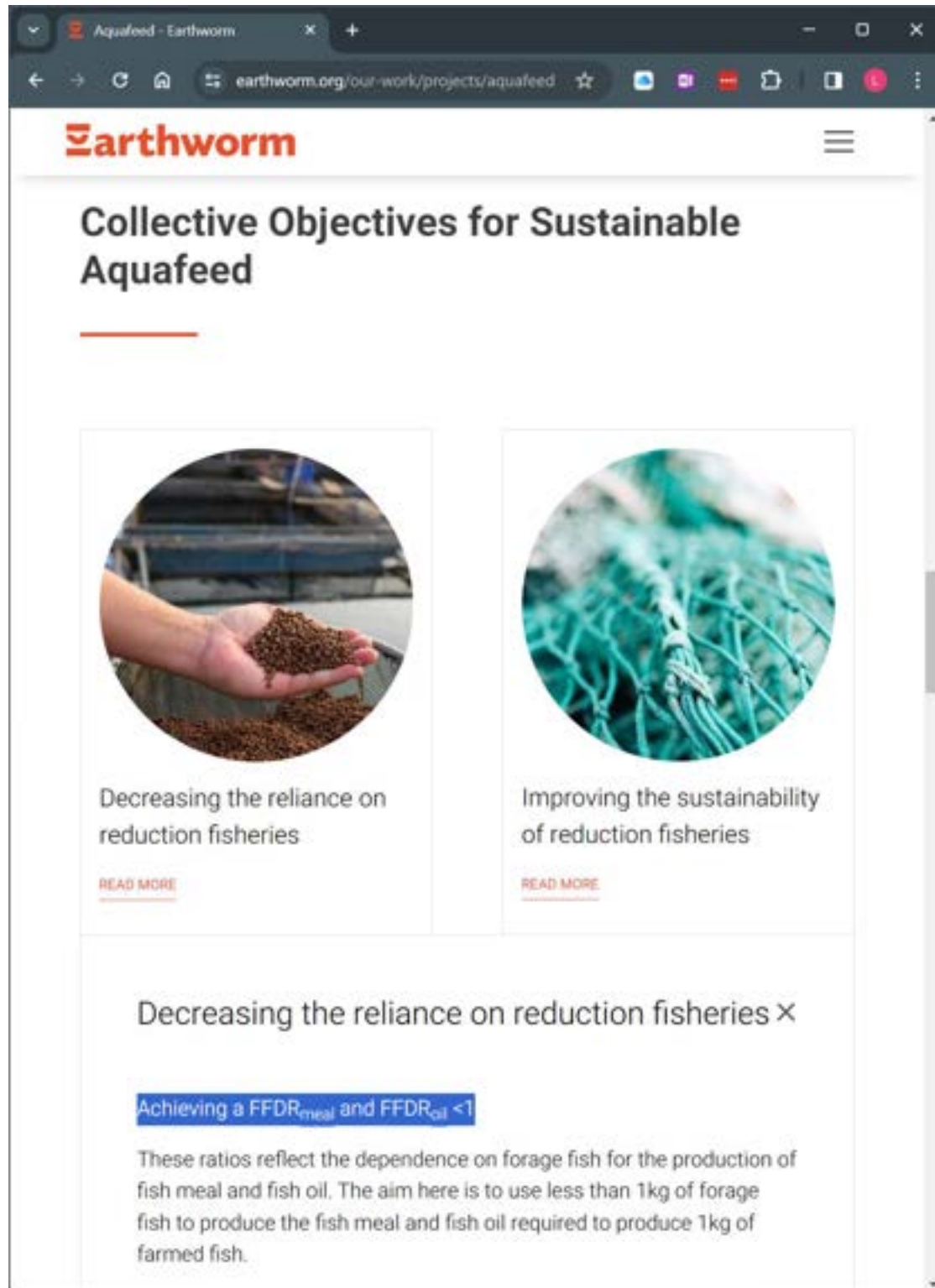




The market looks at our use of wild fish in feed



Earthworm

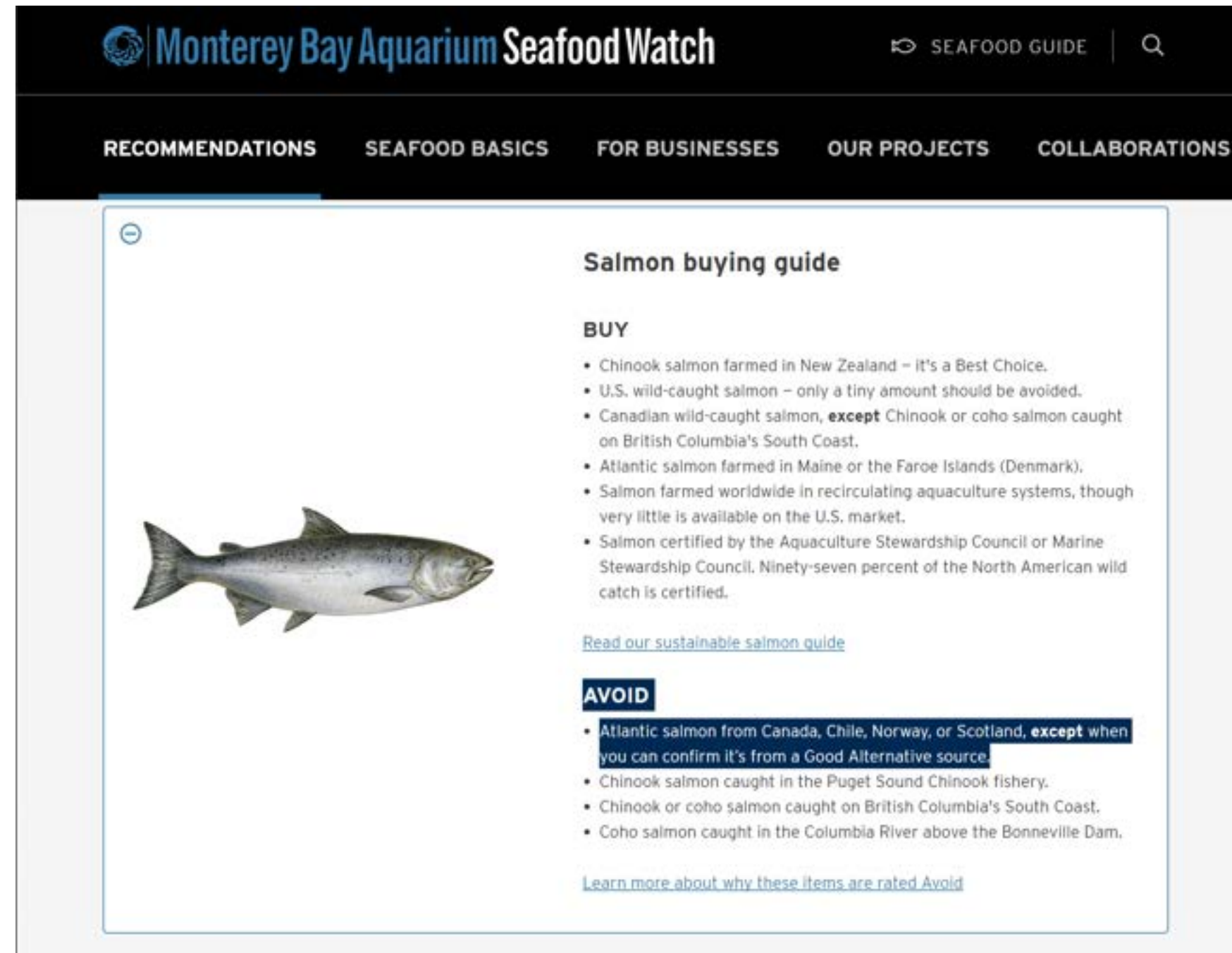
Collective Objectives for Sustainable Aquafeed

-  Decreasing the reliance on reduction fisheries
[READ MORE](#)
-  Improving the sustainability of reduction fisheries
[READ MORE](#)

Decreasing the reliance on reduction fisheries ×

Achieving a $FFDR_{meal} < 1$ and $FFDR_{oil} < 1$

These ratios reflect the dependence on forage fish for the production of fish meal and fish oil. The aim here is to use less than 1kg of forage fish to produce the fish meal and fish oil required to produce 1kg of farmed fish.




Monterey Bay Aquarium Seafood Watch SEAFOOD GUIDE

- RECOMMENDATIONS
- SEAFOOD BASICS
- FOR BUSINESSES
- OUR PROJECTS
- COLLABORATIONS

Salmon buying guide

BUY

- Chinook salmon farmed in New Zealand – It's a Best Choice.
- U.S. wild-caught salmon – only a tiny amount should be avoided.
- Canadian wild-caught salmon, **except** Chinook or coho salmon caught on British Columbia's South Coast.
- Atlantic salmon farmed in Maine or the Faroe Islands (Denmark).
- Salmon farmed worldwide in recirculating aquaculture systems, though very little is available on the U.S. market.
- Salmon certified by the Aquaculture Stewardship Council or Marine Stewardship Council. Ninety-seven percent of the North American wild catch is certified.

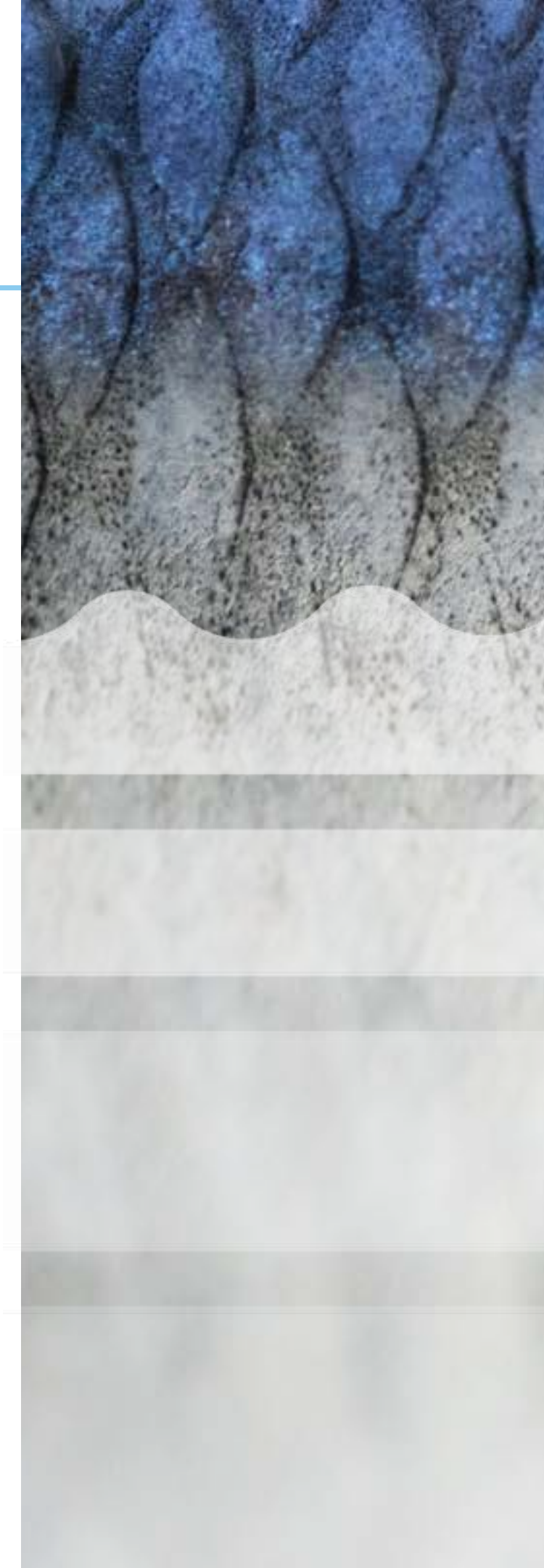


[Read our sustainable salmon guide](#)

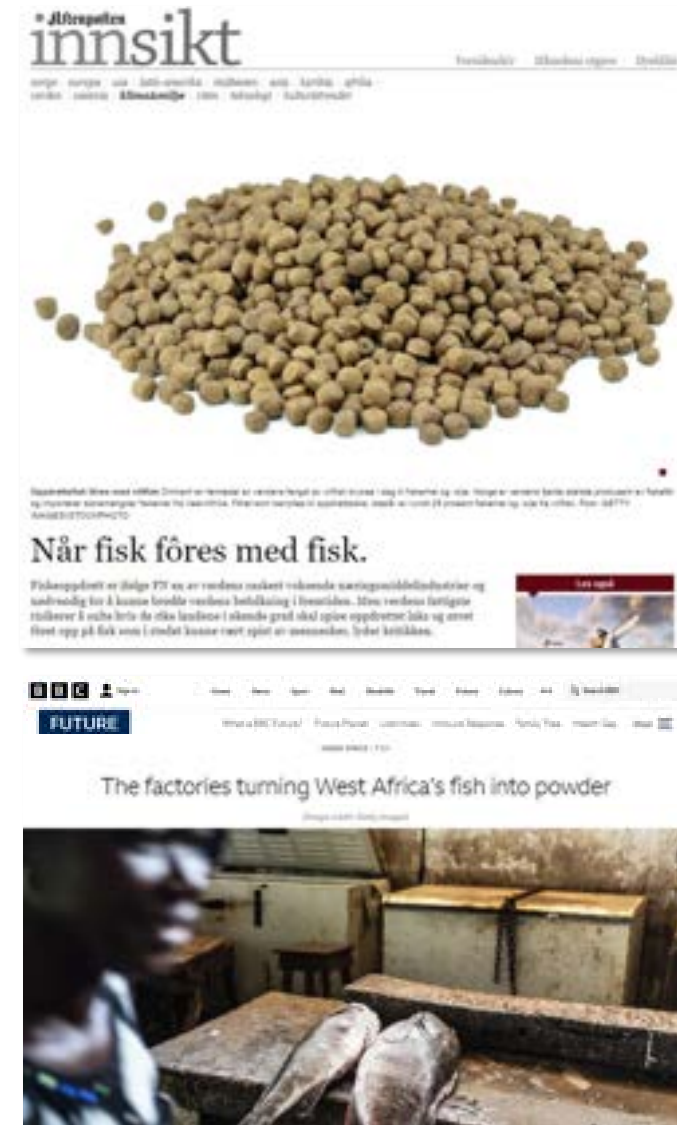
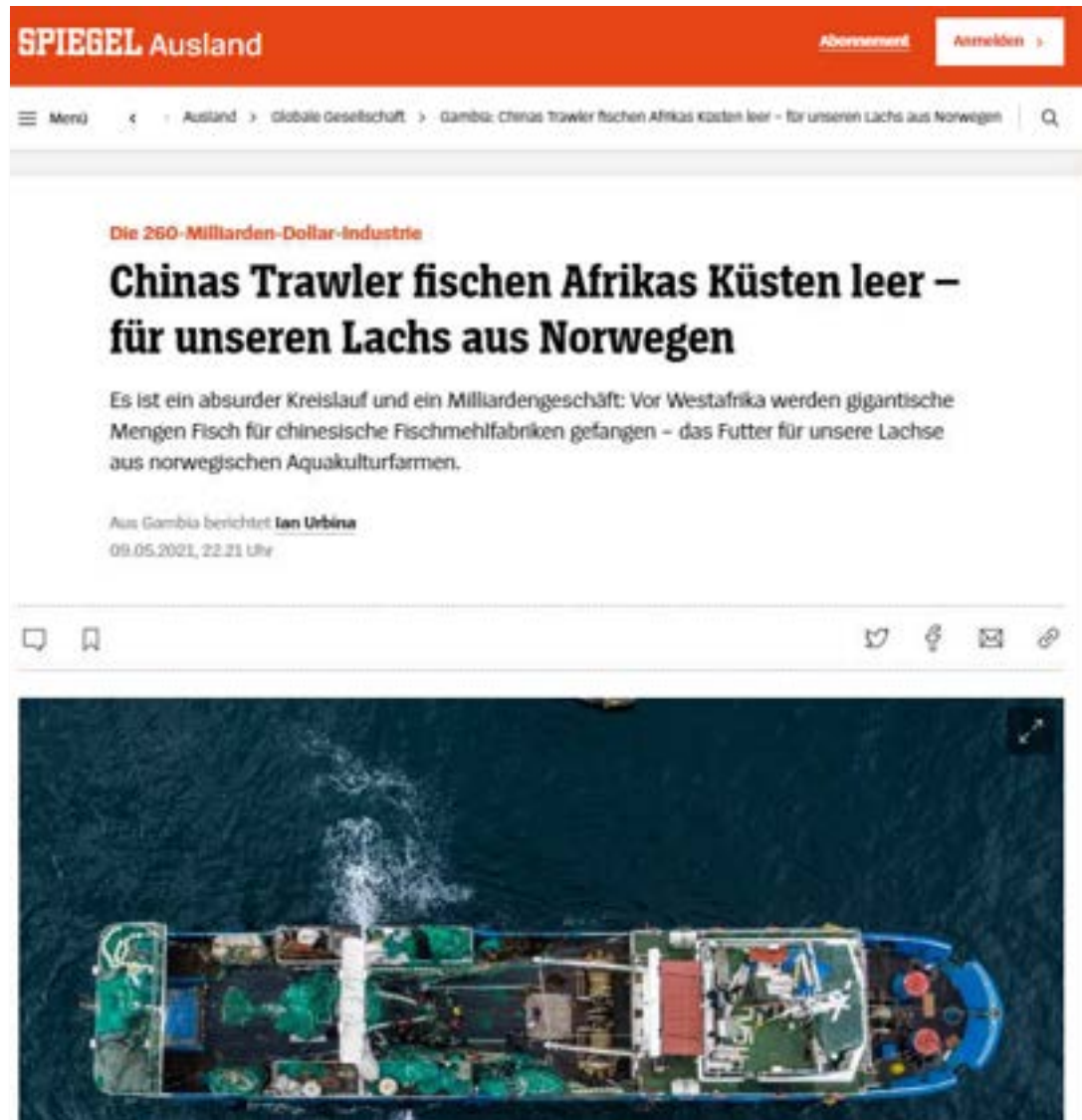
AVOID

- Atlantic salmon from Canada, Chile, Norway, or Scotland, **except** when you can confirm it's from a Good Alternative source.
- Chinook salmon caught in the Puget Sound Chinook fishery.
- Chinook or coho salmon caught on British Columbia's South Coast.
- Coho salmon caught in the Columbia River above the Bonneville Dam.

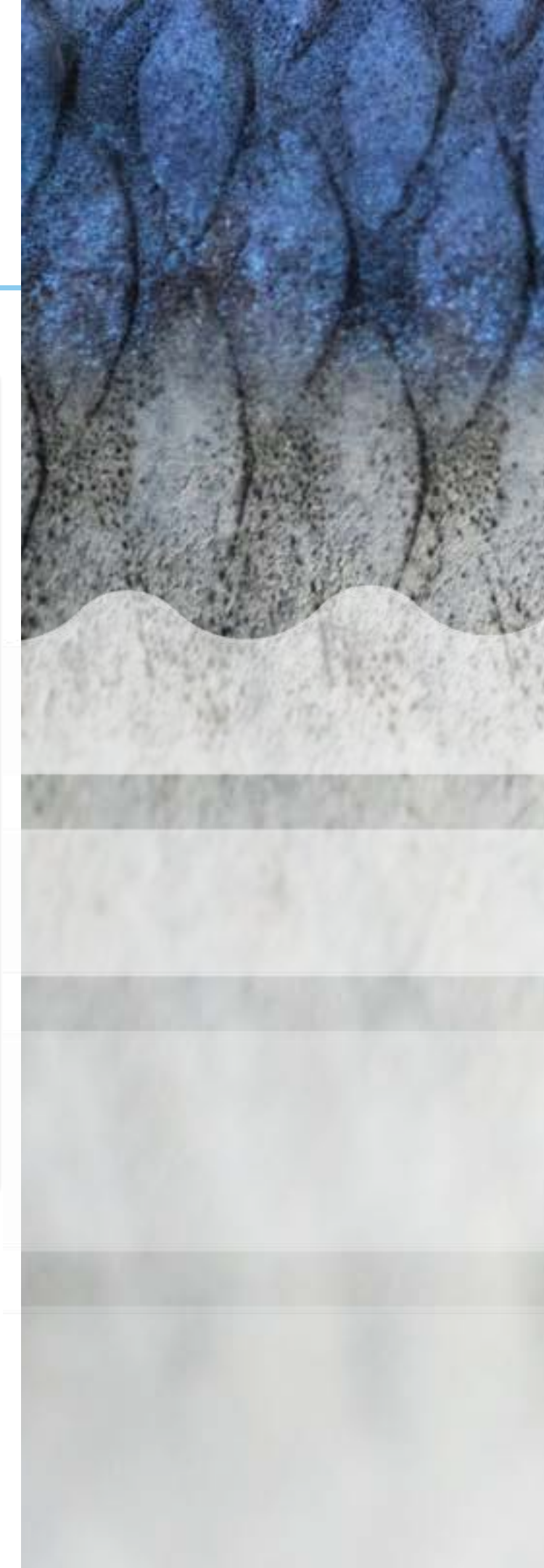
[Learn more about why these items are rated Avoid](#)



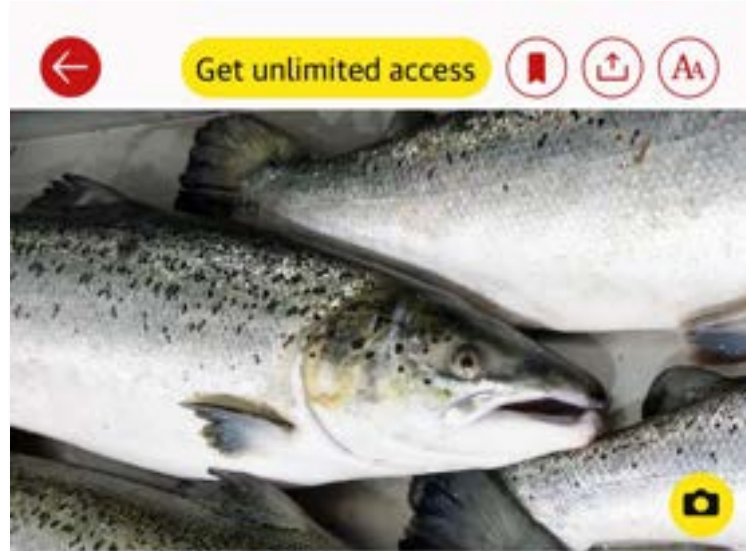
Salmon is the **Poster Boy** of over-fishing



It doesn't matter if it is wrong



Three media clips from the last five months



'It's a poor product': leading UK chefs join campaign to cast farmed salmon off menu

Ethical concerns over sustainability and welfare have seen venues offering new choices to ubiquitous 'chicken of the sea'

Tomé Morrissy-Swan
Sat 14 Oct 2023 11.00 BST

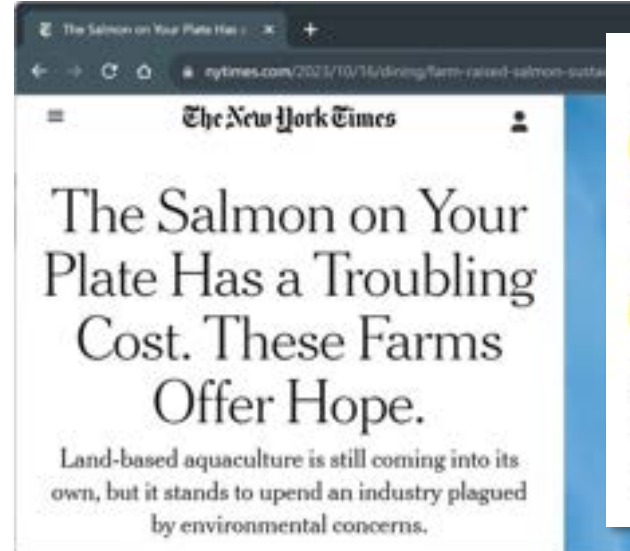
Follow Tomé Morrissy-Swan



valuable food export. Healthy, low in saturated fats and high in omega-3, salmon is a success story.

Yet an increasing number of top chefs are turning their back on the pink-fleshed crowdpleaser - called the "chicken of the sea" by some - citing environmental and welfare issues in salmon farming, including concerns over the use of antibiotics and chemicals; the large amounts of wild fish that could otherwise be eaten by humans being used as feed; its role in declining wild salmon populations; and lack of quality.

Advertisement



As for farmed salmon from Chile and Norway, which make up the vast majority of what's available, the results are mixed. About half of the salmon from those countries is on the red "avoid" list, and it can be almost impossible to figure out exactly what you're getting at the fish market or supermarket.



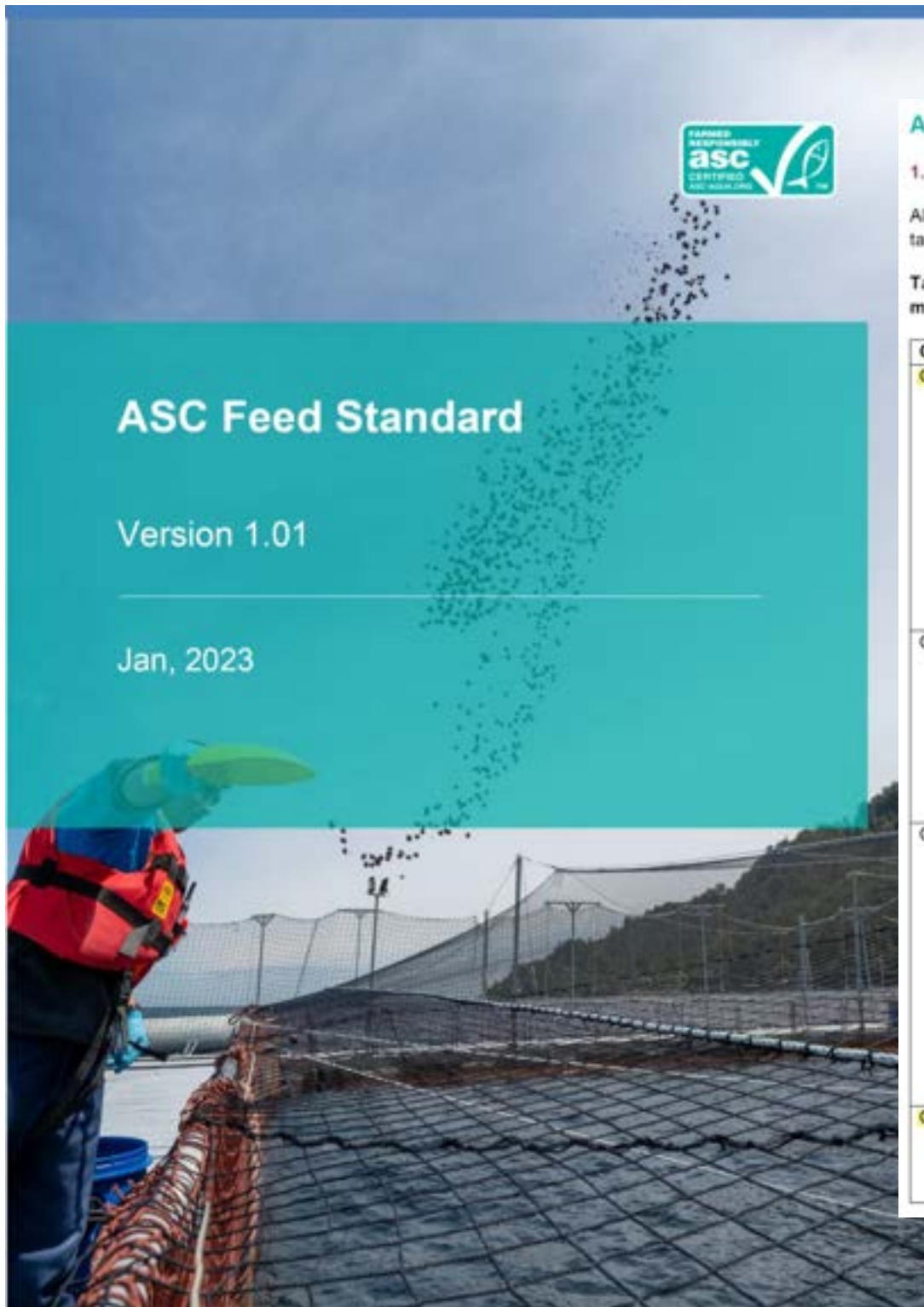
marin
Trust



CERTIFICATIONS

**THE BEST
ANSWER WE HAVE**

ASC certification is valuable



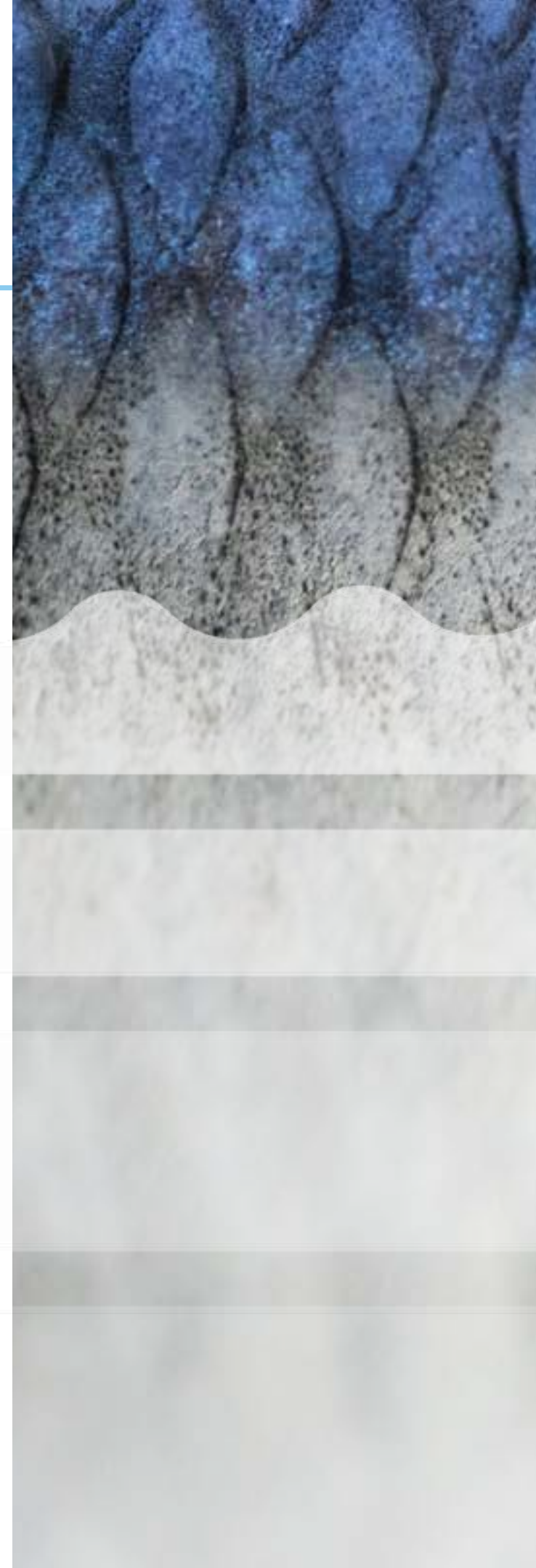
Annex 4: Calculation of the Majority Sustainability Level (MSL)

1. Step 1: Determine the whole fish Sustainability Category

All whole fish marine ingredients must be scored according to the table below. The following table explains how to assign the Sustainability Category to whole fish marine ingredients.

Table 2: This table describes the Sustainability Category assigned to whole fish marine ingredients.

| Categories | Whole fish used as raw material sourced under the following conditions |
|------------|--|
| Category 1 | <ul style="list-style-type: none"> - Raw material is approved according to the MarinTrust Improvement Programme, and; - Raw material is listed active as (basic)²⁰¹ FIP on www.fisheryprogress.org, and; - The ingredient manufacturer is a MarinTrust Improver Programme Accepted Site (or equivalent²⁰²), and; - The ingredient received by the UoC is MarinTrust CoC certified from factory to feed mill or the UoC can demonstrate a verified traceability system from factory to mill. |
| Category 2 | <ul style="list-style-type: none"> - Raw material is approved according to the MarinTrust Standard (or equivalent²⁰³), and; - The ingredient manufacturer is MarinTrust certified (or equivalent), and; - The ingredient received by the UoC is MarinTrust CoC certified from factory to feed mill or the UoC can demonstrate a verified traceability system from factory to mill. |
| Category 3 | <ul style="list-style-type: none"> - Raw material is approved according to the MarinTrust Standard (or equivalent), and; - Raw material is engaged in a comprehensive²⁰⁴ FIP and is listed active as such on www.fisheryprogress.org, and; - Raw material remains approved according to the MarinTrust Standard until Category 4 is achieved, and; - The ingredient manufacturer is MarinTrust certified (or equivalent), and; - The ingredient received by the UoC is MarinTrust CoC certified from factory to feed mill or the UoC can demonstrate a verified traceability system from factory to mill. |
| Category 4 | <ul style="list-style-type: none"> - MSC Chain of Custody (Default Version); raw material is Marine Stewardship Council Chain of Custody certified (or equivalent²⁰⁵). |



Salmon producers are worried

Salmon Group Statement

Salmon Group is a network of family-owned salmon and trout farmers ranging from small hatcheries to large companies. We represent about 13% of Norway's total production volume, the total volume exceeding 200 000 tonnes.

Salmon Group is one of Norway's largest buyers of fish feed with an annual volume of approximately 230 000 tonnes. We buy feed for both salmon and trout – from the very small start-up feeds to growth feeds.

Salmon Group is committed to sustainability, and our strategy is based on the three pillars, Fish, People, Planet. Salmon Group thus operates and makes decisions based on three guiding principles:

- Our fish needs to be happy and healthy
- The people who eat our fish shall be certain that the meal they eat is nutritious, healthy and safe
- Our activities shall not harm the planet

We are greatly concerned about the current situation, and are calling on the North East Atlantic Fisheries Commission (NEAFC) coastal States to agree quotas in line with scientific advice and implement a long-term science-based management plan for mackerel, blue whiting and herring.

To prevent negative impacts on the wild stock and to ensure sustainable food production for future generations, we support the aim of the North Atlantic Pelagic Advocacy Group (NAPA) and the fishery improvement project (FIP).

Salmon Groups feed suppliers are contractually required to source certified marine resources only, and we will have to review our feed formulation to ensure that it is possible for our feed suppliers to uphold their contractual obligations.

SALMON
GROUP

Cermaq: Code of Conduct Feed Suppliers

2. RESPONSIBLE SOURCING AND SUSTAINABILITY

Feed Suppliers to Cermaq are obliged to have a Responsible Sourcing Policy that complies with the following requirements:

Fish meal and fish oil shall be sourced only from:

- Fisheries that are regulated and monitored as being sustainable
- All fish meal and fish oil shall be sourced from either certified fisheries or fisheries that are undertaking a FIP¹ process overseen by the Marine Trust

CERMAQ

Grieg Seafood Statement

While we are under continuous pressure from stakeholders to move away from fish meal and fish oil and into new alternatives like algae oils, and while we are increasing our sourcing from such novel ingredients as they become available, Grieg Seafood do believe that marine ingredients based on sustainably sourced fisheries has a role to play in the aquaculture feed of the future. However, if fishing quotas in the North East Atlantic Ocean cease to be based on scientific advice, impacted fisheries can no longer be a part of the future solution.

Grieg Seafood require all marine ingredients based on forage fisheries to be certified by MSC, MarineTrust or subject to a Fisheries Improvement Project (FIP). We call upon on the North East Atlantic Fisheries Commission (NEAFC) Coastal States to agree quotas in line with scientific advice, and implement a long-term science-based management plan.

It would be a major defeat for the Coastal Governments and involved industries if blue whiting should lose its FIP status.

Grieg
Seafood

Some of the salmon producer's requirements

Feed companies will walk away

Skretting Norway:

'Skretting Norway only buys marine raw materials from whole fish that are certified or subject to a Fishery Improvement Project (FIP). So, we stopped sourcing fish meal and fish oil containing blue whiting when the MSC certification for blue whiting was suspended earlier this year – due to continuing dispute over quota allocation of blue whiting resulting in overfishing to continue.

We are calling on the North East Atlantic Fisheries Commission (NEAFC) coastal States to agree quotas in line with scientific advice and implement a long-term science-based management plan for blue whiting.

To encourage this, we are participating in the North Atlantic Pelagic Advocacy Group (NAPA) blue whiting fishery improvement plan (FIP) and will start to source blue whiting if the FIP is implemented. **Should progress falter, or the FIP fail, we will continue our stand to not source fishmeal containing uncertified blue whiting.**

Biomar

We find it promising that the Coastal States are following the scientific recommendations set by ICES for next year's Blue Whiting fishery. Now that the fishery has been approved for a Marine Trust FIP, BioMar will start to purchase Blue Whiting fishmeal and oil again. **If, however the FIP should fail we will stop purchasing this material** as we, our customers and stakeholders follow the highest ethical and sustainability standards. It is vital that an agreement on the distribution of quotas can be achieved in 2022 and we urge the Coastal States to find a resolution promptly to avoid any potential risks of overfishing and therefore failure of the current FIP.

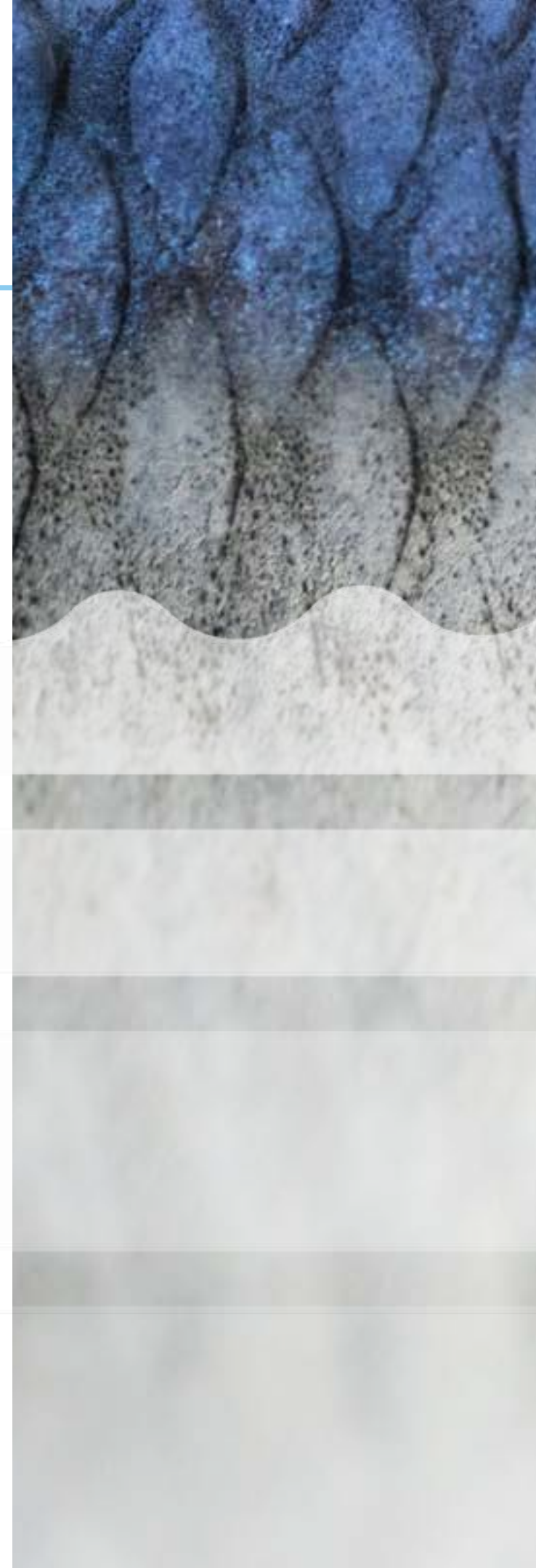
Cargill:

Cargill is committed to working with our supply chains to develop and maintain sustainable sources of raw materials. Our aquaculture nutrition business uses fishmeal and oil from forage fisheries and trimmings from fisheries for direct human consumption. Demonstrating sustainable management of the fisheries we source from is critical – not just for our reputation, but also to enable fishmeal and oil to be continued to be used in feeds for a sustainable aquaculture sector.

When the MSC certification for blue whiting was withdrawn in December 2020, we publicly recorded that we stopped buying material from blue whiting caught after that date. Establishing a Fishery Improvement Program (FIP) through the North Atlantic Pelagic Advocacy Group (NAPA) provides a highly credible way for regulators, fishing associations and fishers to engage to find a solution that delivers a long term solution for sustainable management of the shared stocks. We call on all stakeholders to engage actively and sincerely in the progress in line with broader commitments to ocean stewardship as part of a sustainable economy.

As long as the FIP demonstrates progress against its goals, we will support the sector by purchasing marine ingredients with blue whiting. However, **if the FIP fails, we will continue our stand not to source marine ingredients containing uncertified blue whiting.**

From «NAPA Member sourcing statements»





NORTH
ATLANTIC
PELAGIC
ADVOCACY
GROUP



David Robb

Cargill

Sustainable management of Northeast Atlantic blue whiting
& the implications for the feed industry: [A Call To Action](#)



The Market Response: NAPA was formed

Market Impacts Required Action

- Commitments to responsible and sustainable sourcing were at risk
 - No certifications on the fisheries
 - Clear evidence of over-fishing
- Key issue:
 - Lack of collaboration between nations on quota sharing
- A broad sector was affected:
 - Retailers
 - Processors
 - Feed Companies
 - Fishmeal and Oil Producers

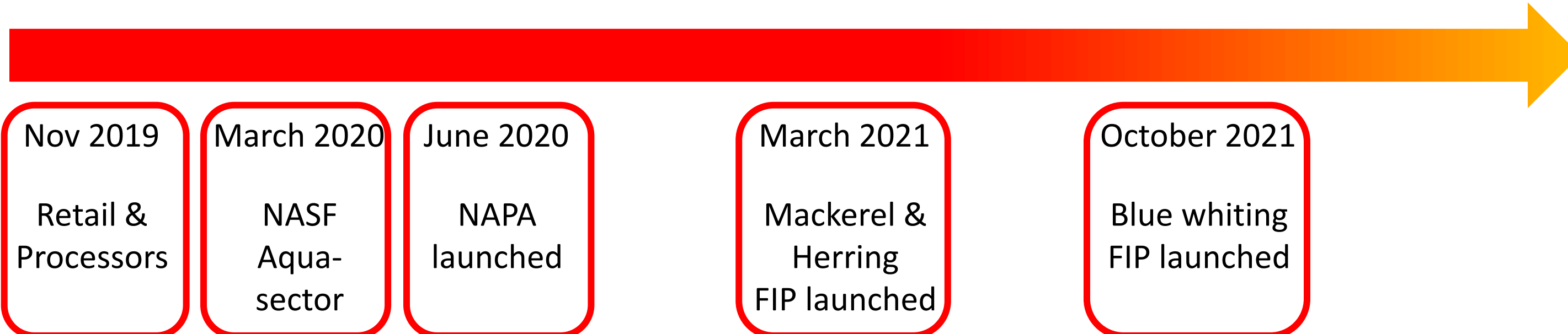


Pre-Competitive Collaboration was Initiated

- What is NAPA?
 - North Atlantic Pelagic Advocacy group
 - Pre-competitive group
 - Common goal
 - Advocacy towards the coastal nations' regulators and their representatives

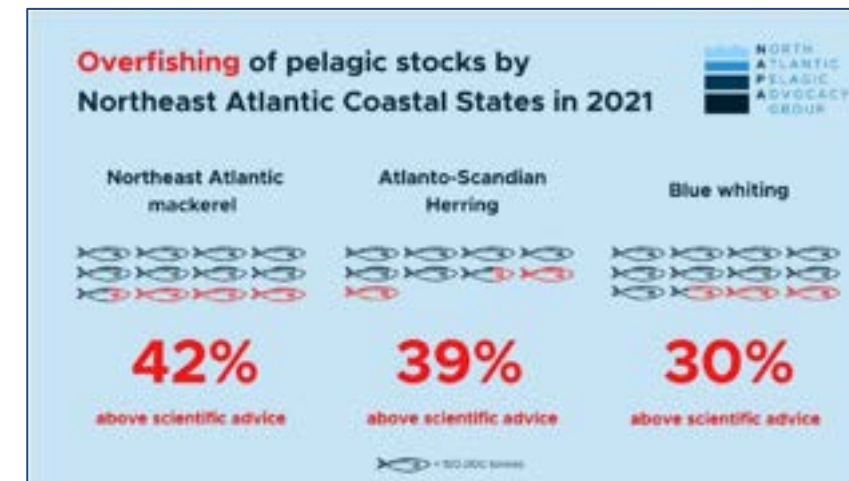


Advocacy Work



Progress and Missed Opportunities

- NAPA has had an impact:
 - Advocacy
 - Promotion of ideas for solutions
- Coastal States and NEAFC discussed systems for quota sharing
- But, an opportunity in 2023 was spurned for blue whiting
 - Large increase in TAC advised by ICES
 - Chance to keep proportions of catch from 2022 **and** catch more fish – for everyone
 - But everyone wanted more



Is this the last chance for blue whiting?

- Blue whiting FIP expires in October 2024
- No Progress = No Certification
- Blue whiting cannot be used for ASC feeds
- From a Cargill perspective supporting NAPA and our customers, our Sourcing Statement (Sept 2021):



“When the MSC certification for blue whiting was withdrawn in December 2020, we publicly recorded that we stopped buying material from blue whiting caught after that date.”

“As long as the FIP demonstrates progress against its goals, we will support the sector by purchasing marine ingredients with blue whiting. However, if the FIP fails, we will continue our stand not to source marine ingredients containing uncertified blue whiting.”



- Cargill used no uncertified blue whiting caught in 2021
- We are preparing for the future



NORTH
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PELAGIC
ADVOCACY
GROUP

What's next

- If the FIP fails businesses may need to stop purchasing blue whiting.
- This will impact all parts of the supply chain – so collectively we need to pay attention and act.
- We need to work collaboratively to encourage and support Coastal States to reach agreement.
- NAPA is focusing on the Norwegian government to highlight the wider economic impacts if blue whiting management is not secured.
- Wider industry support is needed - please get engaged!





Thank you

www.napafisheries.org
aoife.martin@seafish.co.uk