



## **Workshop on Voluntary Sustainability Claims on Seafood Products**

**13 – 15 July 2020**

**Online**

The poster is divided into two main sections. The left section has a teal background with white text. The right section is a vertical strip showing various seafood products: mussels, a fish, a squid, a scallop, and more fish.

**VOLUNTARY  
SUSTAINABILITY CLAIMS  
ON SEAFOOD PRODUCTS**

Workshop by the Market Advisory Council

**MAC**  
Market Advisory Council

**13 - 15 July (10:00 - 12:30 CET)**

**Online Sessions**

- I - Public & Private Initiatives
- II - Value Chain, Environment & Market
- III - Sustainability & Farm to Fork Strategy

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### **Workshop Report**

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## Session I: Introduction & Public and Private Initiatives

### - Introduction

- **Opening: Benoît Thomassen, Chair of Working Group 3, MAC**

As established by the adopted Terms of Reference, the purpose of the workshop is to bring together members of the MAC, institutions and external experts in a constructive exchange about how voluntary sustainability claims and information on seafood products, including ecolabels and certification schemes, interact with the European seafood market.

The workshop includes many and diverse interventions. The aim has been to try to cover as many facets of the concept of sustainability and its definition on the field. We will talk about private and public initiatives, experiences from the whole value chain, real economic and environmental impacts, consumer attitudes, animal welfare and examples of well-known labels.

Sustainability is a very precise concept, which can be defined as a way of meeting our present needs without compromising the capacities of future generations to meet their own. It is a simple definition in principle, but that becomes more complex when it needs to be defined in a deeper manner. Sustainability is generally divided into three dimensions: environmental, economic, and social. Each dimension is then subdivided into several factors. There are as many definitions of sustainability as there are people to define it. The definition of sustainability is also comparable to a DJ mixing table. The sound that comes out depends on the importance given to each input. It is the same for sustainability.

Depending on the importance given to each factor and dimension, the definition will provide more importance to the economy or to the environment or to the social aspect. Plus, it is this definition which, depending on its orientation, will best resonate in the ear of a consumer and that, in the context of labels, will make the consumer more aware to one or the other.

## Session I: Introduction & Public and Private Initiatives

### - Introduction

- **Keynote Speech: MEP Pierre Karleskind, Chair of EP PECH Committee**

In the context of the COVID-19 crisis, it is important to bring together the different relevant stakeholders of the seafood supply chain. The European Green Deal focuses a lot on sustainability and aims to ensure that marine ecosystems are not jeopardised. Sustainability is at the centre of several policies and it is important to ensure that all elements of sustainability are balanced.

Under the Farm to Fork Strategy, sustainability is an essential element and the specificities of European fisheries production must be considered. In the EP PECH Committee, in exchanges with the European Commission, MEPs have expressed disappointment with the lack of a seafood aspect in the EU Biodiversity Strategy and the Farm to Fork Strategy.

Another essential element is traceability, which is under the Control Regulation. Traceability protects consumers. Consumers should be able to access information. Traceability is also relevant to fight against IUU fishing. Traceability is also an element of the valorisation of European product and consumers should know when they purchase European products.

There should be appropriate labelling and there are several possibilities, for example a public EU ecolabel. The EU already guarantees that European fisheries and aquaculture have the highest standards in the world. It is important to ensure that MSY is respected and that EU fisheries are managed properly. It is not always clear for consumers that European seafood is the most sustainable in the world. Therefore, pedagogic work is needed. Concerning private labels, it is important to highlight the existing problems and to value specificities. In terms of costs, labels must be accessible to producers. Information must be understandable for consumers. Orientation from the European Commission and industry is awaited.

The European Green Deal and the Farm to Fork Strategy should not be seen as sanctions, but as a policy of valorisation. Ecolabels are there to highlight the work done and can be an opportunity to strengthen the links between fishers, aquaculture producers, processors, EU industry, science, and NGOs. NGOs are essential as whistle-blowers and to enhance trust in the consumers in the valorisation of seafood products.

## Session I: Introduction & Public and Private Initiatives

### - Introduction

- **Terms & Forms of Sustainability Claims: Prof. Dr. Simon Bush, Professor and Chair of Environmental Policy, Wageningen University – [Presentation](#)**

This discussion is very timely in the context of the European Green Deal and the Farm to Fork Strategy. It is important to keep in mind the global position of the EU in terms of seafood and the global nature of seafood trade. It is also important to keep in mind the EU's self-sufficiency rate, since 65% of seafood products are imported. The EU represents, by value, 63% of global trade.

Market-based claims operate within markets. Standards tend to focus on producers' practices, the performance of fish stocks and the performance of regulatory systems. Beyond producers, there is trade, including traceability and sustainability. Traceability is not necessarily designed to provide sustainability, but it provides the possibility to know more about the product. It is important to have standards to communicate from producers to consumers. Information and product integrity are also important. Issues of equity are also increasingly relevant. When discussing sustainability claims, the consumer perspective is often forgotten. Consumers are looking for various claims within the market. The proliferation of claims comes partially from consumer demand. Consumers require information. Market-based claims are operating as an interface between the points of this chains. It is credence-related product information. Price transmission plays a role, but also the market access. Market access is an incentive for producers and traders to fulfill certain predefined standards.

There is a proliferation of schemes and claims. Claims been made in the market include, for example, "equitable, traceable, sustainable, legal, responsible, pro-active, improvement". The kinds of assessment also need to be considered. It can be a 1<sup>st</sup> party claim, for example, a fisherman claiming to be sustainable. A 2<sup>nd</sup> party claim, for example, a supermarket testing suppliers. Or a 3<sup>rd</sup> party claim with an independent party using independent standards to assess the sustainability performance of the producers. There is also the question as to whom the claims are being made to. Claims can be consumer-facing, but these can also be B2B or business-to-NGO. There are multiple methodologies for assessing sustainability. Sustainability is an imperfectly-measure credence attribute, meaning that it is a characteristic that cannot be seen by holding the product or tasted. It is an abstract system that requires abstract systems.

Taking into account the mentioned proliferation, in the past years, a range of organisations have appeared to set standards for standards. The trend is for oversight, rather than harmonisation,

over the contents and production of the standards. The oversight is provided by NGOs, commercial partnerships, and States. There is a risk of a new round of proliferation, so the role of the EU could be discussed.

Sustainability is about improvement by fishers. Globally, 12 to 21% of fisheries production is covered by a sustainability related claim. This leaves a huge volume of fish not covered. 18 to 25% of European net supply is covered a sustainability related claim. The EU will need to engage with fisheries from all over the world, which are nowhere near having the same level of fisheries covered by claims. The majority of the fish entering markets in the world have not been assessed by a sustainability claim. There is a challenge to move fisheries towards sustainability.

There are three key dimensions of market claims that should be taken into consideration. It is difficult to balance the three corners of this triangle: credibility, accessibility, and continual improvement. A credible market claims is composed of: scientific rigour, impartiality/independence, “public” insight and review over standards content and procedure, reproducible impact reflecting the claims made, and accessibility to both standards and markets by producers and consumers.

In relation to the importance of accessibility, the volume of fisheries that is certified or rated varies significantly by region around the world. The great portion of fish is produced in Asia, but only a small portion is covered by these claims. There is strong coverage in North America, but very limited in South America and Africa. These figures are important to understand the EU’s influence over sustainable seafood. An exclusive system will not take on board global sustainability. It would create standards that can be used by those that can comply, but this is low risk and low reward. There are broader trends of patterns of imports, by value, shifting from the developed to the developing world. It is necessary to understand the sustainability requirements that can be placed by the EU around the world to move global seafood towards sustainability. On the importance of improvement, there is evidence that developing world FIPs stagnate when market access is granted, meaning that these do not move towards actual improvement. The failure of improvement is not only on the hands of the fishers, but also of the market. Conditionality must be in place.

As some final questions for consideration, it is necessary to consider the level of accessibility and at what cost of credibility, the level of credibility to ensure a level of improvement, and the level of accessibility that matches which level of improvement. No single (unified) sustainability claim will satisfy producers, traders, and consumers. There will always be a number of claims and methodologies to reflect the diversity of global seafood trade. A diverse system of codes and



standards is the only way to reach global sustainability outcomes. Multiple claims from multiple labels will remain. It reflects diverse incentives at different points in value chains. The key challenge is to avoid “coordination failures” between the different standards and codes, in order to avoid extra costs in the chains, overburdening fishers, and not confusing consumers. Unconditional markets claims should be avoided.

On the new roles for existing organisations, it is necessary to consider coordination of oversight and conditionality for multiple codes and standards. Moving to tailor made sustainability claims for buyers based on their sustainability “risk profiles”. Risk profiles balance out high-risk-high-rewards claims and low-risk-low-rewards claims.



## Session I: Introduction & Public and Private Initiatives

### - Introduction

#### • Q&A

Q: Next to the concerns of credibility of sustainability claims on the environmental content, could you contemplate more on the instrumental use of these claims by industry stakeholders as a way to block competition and place market barriers for competitors outside the EU market?

A. by Prof. Simon Bush: These standards are used by different parties for their own interest. In some instances, standard can be questionable. It is important to understand the role of buyers in Europe in setting conditionality for improvement. The consequences must also be recognised.

Q: Is more progress being done on the issue of sustainability claims in the aquaculture sector than in capture fisheries?

A. by Prof. Simon Bush: The presentation focused more on capture fisheries, but the issues hold for aquaculture. For aquaculture, there is a larger set of standards and codes. In relation to fisheries improvement, there is more happening in the aquaculture sector. It makes the consequences of non-scientifically rigorous standards even more difficult to deal with it.

Q: Given the ambition of the Farm to Fork Strategy to create sustainable food systems with consumers in the center stage, plus the appeal for a high-risk-high-reward system to incentivize change, what would this mean for the EU's role in global ocean sustainability, taking particularly into account the Asian non-assessed fisheries and the EU's 65% of imports in seafood consumption.

A. by Prof. Simon Bush: The EU has a chance to set a framework to ensure a high-risk-high-reward approach for seafood sustainability. It could be done through the setting of requirements or guidelines that move beyond market access for high performers alone and, instead, enable buyers to take on higher levels of risk across a range of species and regions. In sum, move beyond an *a priori* exclusionary model towards a conditional inclusive model for improvement. Elements of the IUU strategy already do this. The question is how the EU can enable the private sector to take up such an approach.

Q: Is there a need for an aggregator of NGO schemes and standards in Europe and more globally similar to the conservation alliance for seafood solutions (CASS) in the EU?

A. by Prof. Simon Bush: I think that is where things are heading. There is a risk of a new round of proliferation of such aggregators. It is not necessarily a problem, if the aggregators compete based on the precision and accuracy of their oversight, and/or they specialize in different "portfolios" (high and low risk) of fisheries.

## Session I: Introduction & Public and Private Initiatives

### - Public Initiatives

- **FAO Guidelines for the Ecolabeling of Fish and Fishery Products: Nianjun Shen, Senior Fishery Officer, FAO – [Presentation](#)**

The purpose of the guidelines is to provide guidance to Governments and organisations that already maintain, or are considering establishing, labelling schemes for certifying fish from fisheries or from aquaculture. There are three voluntary guidelines for marine capture fisheries, inland capture fisheries, and for aquaculture. There is also an evaluation framework for aquaculture certification. There are different indicators to harmonise schemes.

There are 14 principles listed in the marine capture fisheries guidelines. The general principles are: 1) consistency with the relevant international law (UNCLOS, Fish Stocks Agreement, WTO), 2) voluntary, market-driven, transparent, non-discriminatory, and 3) recognising special conditions applying to developing countries.

The minimum substantive requirement and criteria consist of four categories: 1) management systems, meaning that fisheries should be conducted under a management system that respects good practices; 2) stock under consideration, meaning that the stock is not overfished; 3) ecosystem considerations, meaning that adverse impacts of fisheries should be appropriately assessed and addressed; and 4) methodological aspects. Procedural and institutional aspects consist of three guidelines: 1) guidelines for the setting of standards, 2) guidelines for accreditation, and 3) guidelines for certification. The guidelines for aquaculture certification have a similar structure with the exception of the minimum substantive criteria, which introduces: 1) animal health and welfare, 2) food safety and quality, 3) environmental integrity, and 4) social responsibility. The GSSI Global Benchmark Tool is based on the FAO Code of Conduct for Responsible Fisheries, the three Guidelines, and the aquaculture evaluation framework.

In terms of technical assistance and capacity building, FAO is focused on developing countries, which is combined with sharing of experiences, involving government officials, business operators, academia, NGOs, CSOs, and others. The FAO produces technical documents, studies and success cases. The FAO provides support on consultations and support to the development of national ecolabelling schemes, harmonisation of standards, and collection of recommendations for future and support of the Members.

## Session I: Introduction & Public and Private Initiatives

### - Public Initiatives

- **The Nordic Swan Ecolabel: Bjorn-Erik Lonn, Senior Advisor, Nordic Swan Ecollabeling – [Presentation](#)**

The Nordic Swan is the official Nordic environmental label in Norway, Sweden, Finland, Denmark and Iceland. It was founded by the Nordic Council of Ministers in 1989 by the Ministers of Consumer Affairs. It is administered on consignment from the governments in national organisations. 2000 companies carry Nordic Ecolabel products and services. There are 62 product category criteria. There are 164 employees in the Nordic countries and the public finance is less than 15%.

The label is organised under the Agreement adopted by the Nordic Council of Ministers. There is a Nordic Ecolabelling Association, which is the board/management, composed by the Chairs of the national organisations, responsible for the adoption of the standards and criteria. There is a full mutual recognition of the work done by the different national associations.

In relation to the success of the label, 91% of people in Nordic countries are familiar with the Nordic Ecolabel. 76% have trust in the Nordic Ecolabel. 74% of people in the Nordic countries think that the Nordic Ecolabel makes it easy to choose. 77% of people in the Nordic countries think that it is important for an ecolabel to be objective and independent. There are small variations among the countries. Campaigns by the licensees increase the awareness of the public concerning the label.

The standards and criteria are reviewed every three years. The applicants need to apply again under the new criteria. There must be a clear definition of the product. The Nordic Swan takes a lifecycle perspective and holistic requirements. Both environmental and social aspects are important. The Nordic Swan covers a wide range of groups of product categories.

As for fisheries and food in general, in the Agreement of the Nordic Council of Ministers, there is no limitation on the kind of products that can be covered. More than 15 years, the Norwegian Ministry of Fisheries requested the Nordic Swan to take up fisheries. There was a preliminary study by Ecolabelling Sweden. The study concluded that it was possible, but there was no further action. There was an attempt to go into food with criteria for bakeries and bread, but it was stopped on a high political level in 2013, because the organic label had such a high position among consumers in Denmark. Currently, there are requirements about organic labelled foodstuff for restaurants and groceries. For fish in shops, points are attributed from different



product assortments. In this context, MSC and KRAV certified wild caught fish and shellfish are mentioned. The label is open to other credible labelling systems. For restaurants, requirements on fish are based on the IUCN's list, plus there are requirements of origin mention in the menu.

## Session I: Introduction & Public and Private Initiatives

### - Public Initiatives

#### • Q&A

Q: Taking into account the challenge to solve coordination failures among the different and many labelling schemes and sustainability claims, what role can FAO play in this? Should it go beyond guidelines and play a more overarching role in the coordination?

A. by Nianjun Shen: The evaluation framework on aquaculture certification is a typical effort, which was to provide a reference document for any entities to use when checking if the schemes are following the FAO Guidelines or not. The one on aquaculture has been approved and is ready to use, but the document on marine capture fisheries not yet. Nevertheless, the FAO has been supporting GSSI to develop and implement its benchmark tools. The FAO has no mandate to assess or coordinate schemes directly.

Q: The presentation on the Nordic Swan mentioned a requirement of the origin of fish in restaurant menus. Is this implemented widely in Scandinavia? We have the experience in the Netherlands that restaurants are not very keen to go in that detail.

A. by Bjorn-Erik Lonn: For the ecolabelled restaurants, that has to be done. Most of the licensees are generally focusing on sustainability issues and, therefore, this kind of information is already in focus when applying for the ecolabel. Consumers in Scandinavia are very much looking for origin of meat and fish also at the shop's shelves.

Q: How often are the licensed companies audited against the criteria?

A. by Bjorn-Erik Lonn: A license is only given after a site-audit and the validity of that is connection to the version of the actual criteria. During the validity, a compliance programme covering central issues is checked by tests. For services, annual reporting on the issues, such as energy and water consumption, must be sent and is checked.

## Session I: Introduction & Public and Private Initiatives

### - Private Initiatives

- **Codes of Good Practice of the International Social and Environmental Accreditation and Labelling Alliance: Caitlin Peeling, Senior Manager, Membership and Services, ISEAL Alliance – [Presentation](#)**

ISEAL is a membership organisation founded in 2002. The aim is to strengthen the effectiveness of voluntary sustainability standards. It provides public technical resources for the development of credible systems. It looks into supporting innovation to drive credible sustainability solutions.

The ISEAL Credibility Principles were published in 2013, following a series of global stakeholder consultations. These apply to classic certification schemes, but also more broadly. These are intended to inform credible practices across a wide range of initiatives. These are accessible entry points to be understood by a wide range of stakeholders.

A standards system is not only the setting of a voluntary standard. It is also about the overseeing of the criteria and the traceability of the claim in the market. One of the critical aspects of a credible claim is being able to monitor and evidence the impacts. ISEAL has three Codes of Good Practices, which are publicly available.

The Impacts Code is the cornerstone of the initiative. It helps define strategies and monitoring. It increases effectiveness at delivering social and environmental impacts. It supports credible communication. The Standards Setting Code helps devise set and revise the standards in a way that builds trust and support. It is a step-by-step approach that supports stakeholder engagement and representation. It supports the development of market-relevant standards. The Assurance Code allows a framework for ensuring sustainability on the ground. It supports the development of a fit-for-purpose assurance approach. It helps ensure consistent and impartial results from compliance activities. It supports learning from assurance activities to deliver increased insights.

ISEAL provides Good Practice Guides on benchmarking and claims. Claims should link very clearly to the strategy and content of the standard. Buyers should be informed, regardless of being B2B or B2C. Monitoring and evaluation approach must be embedded in the system. In terms of innovations, ISEAL is focused on data governance and access to resources for better data sharing, better assessment models, and understanding how improvement strategies can drive change.

Complying with ISEAL Codes focuses on three key areas: reliable claims in complex supply chains, measuring and reporting on impact and effectiveness, and improving the standards model.

## Session I: Introduction & Public and Private Initiatives

### - Private Initiatives

- **The Global Sustainable Seafood Initiative: Hugo Byrnes, Vice President Product Integrity, Ahold Delhaize / GSSI Steering Board member – [Presentation](#)**

GSSI's mission is to ensure confidence in the supply and promotion of certified seafood as well as to promote improvement in seafood certification schemes. GSSI is a global network of companies working with all kinds of certification schemes and governmental organisations and NGOs.

GSSI has three different projects: the Global Benchmark Tool, the SSCI-GSSI Social Benchmark Tool, and the Seafood MAP. The Benchmark Tool is based on the FAO's criteria. It is an ongoing process of continuous improvement. Even after the recognition of a specific scheme, there is continuous monitoring to ensure that work is aligned with the criteria. There are nine GSSI-recognised schemes.

In the global benchmarking landscape, the Consumer Goods Forum has the Global Food Safety Initiative (GFSI) dedicated to food safety and the Sustainable Supply Chain Initiative (SSCI) dedicated to social sustainability. GSSI is dedicated to sea food. The Social Benchmark Tool has criteria developed for processing. Standards can be benchmarked against these criteria. Criteria specifically for aquaculture and wild catch will follow.

The GSSI Seafood MAP is under development to look at non-certified fisheries and aquaculture production globally. It can be used to close the knowledge gap, to inform, to make commitments for improvement, and ensuring collaboration among stakeholders using common language. If the bar is very high, there is risk of losing the connection of production in other countries that cannot meet the same level, so these will not work towards continuous improvement. The Seafood MAP is in the development and pilot phase. The implementation and roll-out phase is expected in 2021.

GSSI is a private initiative, but it closely cooperates with governmental and semi-governmental institutions.

## Session I: Introduction & Public and Private Initiatives

### - Private Initiatives

- **Sustainable Seafood Guides: Karin Bilo, Senior Manager, Global Seafood Certification Standards, WWF – [Presentation](#)**

Common Assessment Methodology (CAM) assessments are desktop review of available scientific fisheries information aimed at providing broad-level guidance to consumers and retailers on a particular species per fishing area per fishing method.

The guiding principles are that: stocks are healthy and abundant, the fishery minimises bycatch, the fishery is managed to sustain long-term productivity of all impacted species, the fishery is conducted such that impacts on the seafloor are minimised and the ecological and functional roles of seafloor habitats are maintained. The CAM translates these guiding principles into three assessment categories: 1) impacts on the species/stock, 2) impacts on other species, habitat and ecosystem, and 3) effectiveness of management. These are translated into 14 questions. Each question consists of factors to evaluate and rank, leading to a number and a colour code.

The assessment process is by a third party trained assessor. It uses available literature and stock assessments. Assessors take a precautionary approach. There are public reviews and comment. Neither CAM or certification cover social or economic sustainability aspects of fisheries. The CAM does not analyse individual fishers or products. It is a review of a particular species in an area with a specific method. It does not allow companies to do product claims.

The Assessment Database Seafood Guide includes 3400 wild catch (re)assessments and 200 aquaculture (re)assessments and is updated annually. The database is not public, but it is available to partners and summaries are provided on request. It is the backbone of the guides to provide consumer advice, it is used for improvement projects, and also for corporate work. It is generally recognised for the consumer advice. It is about making better seafood choices.

27 countries produce seafood guides. Some countries to annual updates, while others do biannual updates. The guides are tailored to the market, focusing on the most consumed species. The online application allows WWF to provide more information and content, including background information and stories. It is important to leave space for extra improvement.

In terms of corporate work, WWF reviews the full corporate seafood portfolio, develops clear and time bound sustainability targets, with public communications on commitment and bi-annual progress reviews. CAM can also be used in improvement projects.



## Session I: Introduction & Public and Private Initiatives

### - Private Initiatives

#### • Q&A

Q: Request for more information on the benchmark that compared seafood guides and MSC.

A. by Karin Bilo: It was a benchmark developed by Monterey Bay Aquarium that compared their methodology with the MSC standard.

Q: There are certified fisheries classified as yellow or red as well as suspended fisheries that are yellow or green.

A. by Karin Bilo: It is indeed the case. Summaries of the assessments are available. Sometimes, the comparisons are different, since WWF is not looking at individual vessels like MSC. Reviewing a species in a region with a specific method does not capture the same level of detail.

Q: Seafood guides do not lead to claims on individual fisheries or business and are not a legal or traceable chain, meaning that it is not a product claim. How is this then to be effectively used by consumers when making purchasing decisions? Plus, how can they be sure that the guide is correct, if they cannot see the underlying data or know who did the assessments?

A. by Karin Bilo: It can be used for informed purchasing decisions, if the information can be found. WWF asks consumers to look into the origin and the methods used. The fact that the database is not publicly available is a shortcoming, but it was primarily used in the advice to partners, where WWF is reviewing portfolios. The summary assessments provide a sufficient idea of how the assessments are done.

Q: WWF has recently announced some concerns regarding social sustainability in fishing. How is WWF taking into consideration all the social standards?

A. by Karin Bilo: WWF is in the process of reviewing the CAM and considering adding social standards. It is one of the main reasons to update the methodology.

Q: How do you become a partner and get access to the database?

A. by Karin Bilo: The partners are the corporate partners that are requesting advice on how to improve their sourcing practices.

Q: How are fishers being integrated with corporate partners and the relevant initiatives?

A. by Karin Bilo: Through fisheries improvement projects. Some of the offices do reviews with the interested and affect parties, in order for them to access the draft assessments and the scientific literature.

Q: Has ILO C188 been considered?

A. by Karin Bilo: Yes, WWF is looking into ILO requirements. WWF has expressed concern with the lack of due diligence in this topic, but it needs to be incorporated into their methodology.

Q: How does the GSSI MAP deliver similar credibility and assurance of improvement claims and social claims, as per environmental benchmark for certification schemes?

A. by Hugo Byrnes: GSSI MAP is not in itself meant as a credibility and assurance tool. It is about information and the interaction between the customers of the fisheries and farms. Credibility is a concern for the future. Presently, it is about knowing where these producers are. The true assurance comes from the certification schemes.



## **Session I: Introduction & Public and Private Initiative**

- **Session Closure**

- **Benoît Thomassen, Chair of Working Group 3, MAC**

There is some room for a European label on sustainability on seafood products. Traceability is also a tool for sustainability. Information is also a tool. It is possible to have public labelling running on public and private funds. The labels must be credible, which requires investment and control. There needs to be dialogue between the certification company and the fisheries.



## **Session II: Seafood Value Chain, Environment & Market**

### **- Session Opening**

- **Benoît Thomassen, Chair of Working Group 3, MAC**

There is a plethora of labels, either private or public, on the market. The most important element is for these to be credible. To achieve this, some are approved by higher institutions, such as GSSI, while others are not more than a sticker on a product.

The first session was focused on the theoretical aspects of sustainability labels. The second session will focus on the experiences of the actors in the field throughout the value chain: the fishing sector, the aquaculture sector, the processing sector, and the sales sector.

Later, there will be two presentations to show the environmental and the economic benefits and impacts of the labelling.

## Session II: Seafood Value Chain, Environment & Market

### - Experiences of the Value Chain

- **Fishing Sector: Sofie Smedegaard Mathiesen, Biologist, Danish Fishermen PO - Presentation**

On the importance of ecolabelling, we believe that we have sustainable well-managed fisheries. Ecolabelling is a way to show this to the consumer and general public, as an add on to own sustainability claims. It ensures access to markets to the members. It might ensure a higher price for the fish. It commits fishers to continue developing sustainable fisheries.

On the choice for MSC, it is one of the most recognised ecolabels by industry and retailers. It has high credibility. There are three overall principles. It is generally accessible for our main fisheries. Most Danish fisheries are MSC certified. We do some of these certifications on our own, while others are done with foreign partners and with their pelagic counterpart.

On the benefits of ecolabels, these ensure market access for members. It shows our commitment to sustainable fisheries, and hence provide credibility to our sustainability claim for Danish fisheries. It is open for all stakeholders to engage in the process of further standard development.

On the limitations, it is open for all stakeholders, but it requires a lot of work. A smaller fishery or a smaller fishery client might not have enough resources to complete the process. It does not always recognise EU management as sufficient to claim fishery sustainability. Short-lived species do not fit completely within the standard. There are still significant discussions on what a sustainable fishery is.

On the costs associated with certifying fisheries under MSC, an assessment can go from 15.000 to 165.000 euros. There can be costs with stakeholder engagement and peer reviews. If there is an objection to your fishery, it requires a significant amount of money. There might be costs to access the data that you need for certification. Additionally, you need to pay managers and researchers to take part in site visits for proper insight on the fishery. Every year, there are surveillance audits, which can cost 2.000 to 35.000 euros. It varies with fisheries and the applicable conditions. Furthermore, there can be additional costs, such as expedited audits, control costs, and project set up to address conditions. Not all projects are relevant for managers and scientists, so it can be difficult to ensure funding and engagement.

Fisheries around the globe are very different and have different challenges, but a global ecolabelling scheme needs/wants to address all concerns, which sometimes requires a fishery to

do additional (and to some extent unnecessary) work with added costs. EU rules and regulation is largely set to ensure sustainable fisheries. However, the MSC standard do not always recognise this as sufficient and appropriate management.

Fisheries in FIPs supported by MSC can be recognised as sustainable sourcing in same way as MSC certified fisheries. Agreement of closed areas in relation to objections to a fishery being MSC certified i.e. side-tracking a proper consultation period for other stakeholder, which is not best practice for proper management. Further to this, it can interfere with markets in a very worrying way. Because part of fisheries' sustainability claims is tied to certifications, having a fishery suspended from the MSC gives the general public the perception that the fishery is no longer well-managed, and overfishing is taking place. This does not help fishery clients to govern a responsible rhetoric on fisheries in general.

As overall reflections, there is always a question on where to set the bar. Some would argue that MSC continues to raise the bar, before getting enough fisheries in the program, so they are basically recertifying the same top fisheries. As a fishery client, we are concerned about the future direction of MSC, as some of our main fisheries are now certified with a lot of conditions, which they were not previously. If the broad scale of EU well-managed fisheries does not fit within the standard, then we can be forced to make the decision to leave the program, as too much work is required to maintain the certifications.

From a fishery's perspective it is, hence, always a risk to let a private ecolabelling scheme set the standard on what a sustainable fishery is, instead of letting EU managers and fisheries set this standard. Under the EU's organic label, a farmer can always know if their production is organic or not, while fishers can be considered sustainable in one day and no longer the next.

## Session II: Seafood Value Chain, Environment & Market

### - Experiences of the Value Chain

- **Aquaculture Sector – ASC Label: Comparison with European and Belgian legislation: Javier Ojeda, General Secretary, FEAP - [Presentation](#)**

There is a plethora of labels focused on quality, origin, sustainability, respect for dolphins, organic production, among others. The ASC is the most comprehensive label. In Belgium, ASC is the most present in the supermarkets, particularly for trout. It is based on five pillars: biodiversity, feed, pollution, fish health, and social issues.

On biodiversity, according to ASC, farms must not be located in Natura 2000 areas. Following Wallonia's legislation, fish farms have already been removed from these areas and fish escapes must be minimised. Under Wallonia legislation, the operator must ensure that a screening system is placed to avoid escapement. Alien trout should not be introduced in waters where it was not present. Rainbow trout has been farmed in Wallonia for over 70 years. The maximum water intake is 50%. Wallonia legislation is more stringent than that.

On feed, according to ASC the use of fishmeal must be minimised. Traceability on the origin of fishmeal and soybean meal must be ensured. The feed used in Wallonia is already certified by ASC. On pollution, measurements of parameters must be taken in regular intervals. Wallonia legislation imposes strict limits. On fish health, there must be a risk management plan developed by a veterinarian. Farms in Wallonia are already required to be checked twice per year, plus visits by an operating veterinarian. Preventive antibiotic treatment is prohibited. In Belgium, antibiotic treatment is prohibited without prescription from a veterinarian. On social issues, these include prohibition of child labour, prohibition of forced labour, a safe working environment, a decent salary, regulated working schedules. Belgian and European legislative framework is much stricter than ASC. The ASC label requires the payment of a fixed annual amount, plus an amount depending on the volume.

Under ASC, all the value chain must be certified, in order to allow the use of the logo. Therefore, both the suppliers and the processors must be certified. In Wallonia, rainbow trout with the ASC label provides in practice no added value. On the other hand, there are additional costs, which are not always recovered by the fish farmer. In Europe, for freshwater aquaculture, these sustainability labels only serve to upgrade non-European productions.

## Session II: Seafood Value Chain, Environment & Market

### - Experiences of the Value Chain

- **Processing Sector: Mike Mitchell, Director, Fair Seas Limited, representing the UK Seafood Industry (SIA) - [Presentation](#)**

Ecolabels can be used to communicate directly to consumers about the sustainability status of the product, but it can also be used as part of the supply chain due diligence and risk mitigation. To have value, ecolabels need to be credible. GSSI benchmarking is used to determine the credibility of labels. Not all seafood products are eligible to carry an ecolabel. Not all seafood sources want to participate in ecolabel scheme. Not all retailers wish to use an ecolabel, even the products are sourced from an ecolabel certified fishery. There is a need for a consistent approach. It is essential to both protect the businesses making claims and to reduce confusion for consumers. The underlying principle is not to mislead the consumer. Similar to food safety, food sustainability is a matter of common interest, so it can serve as a pre-competitive for establishing the criteria for B2C communications.

The Sustainable Seafood Coalition includes large retailers, value-added processors, importers, federations. It is a broad collaborative platform to achieve common rules on how to declare statements of sustainability to the consumer. The SSC has developed Codes of Practice, which are voluntary. These were created in the absence of governing legislation on self-declared claims of environmental responsibility. The codes were created collaboratively and pre-competitively by the industry with the help of the NGO ClientEarth. Sourcing decisions and any claims of environmental responsibility based thereon are determined by two risk-based decision tree processes (one for wild capture fisheries and one for aquaculture) and accompanying guidance within the codes. Two types of claim are permitted dependent upon the outcome of the risk assessment - 'responsible' and/or 'sustainable'.

Claims of 'sustainability' refer to empirical evaluations of the resource status, while claims of 'responsibility' refer to descriptions of corporate behaviour. Ecolabels become a tool to accept a claim of sustainability. Voluntary claims of environmental sustainability or responsibility must be premised on demonstrable engagements with credible and independent initiatives: GSSI benchmarked third party certification standards, or independent expert opinion, or engagement with credible, transparent and timebound fishery or aquaculture improvement projects - ecolabel schemes can act as incentives and as frameworks for these improvement initiatives.





There is a consumer claim hierarchy. For a “Sustainable” claim, the product is sourced from a fishery that has been certified against a GSSI benchmarked sustainability standard – full Chain of Custody is in place and the product carries an eco-label. For a “Responsible” claim, the product is sourced from a fishery or fish farm that has been certified against a GSSI benchmarked responsible production standard; there is credible, independent, expert advice that the source would meet the certification criteria as above; the source is participating in a credible, transparent and timebound fishery or aquaculture improvement project.

Questions remain on what is coming next and gaps in the market, which are not comprehensively covered by the existing standards. The market is increasingly looking into common platforms and common means of assuring that supply chains are operating to best practices, for example on human rights. In wild capture fisheries, human rights is a very difficult issue to get independent third party assurance. There are environmental sustainability issues, such as greenhouse gas emissions by the industry, which are outliers from most third party schemes. There are potential new areas for sustainability claims to move into.

## Session II: Seafood Value Chain, Environment & Market

### - Experiences of the Value Chain

- **Retailers: Ondina Afonso, Head of Quality & Research / President of Continente Producers Club, Sonae MC - [Presentation](#)**

The EU is the leading region on fisheries sustainability. The CFP has been the tool to ensure that fisheries and aquaculture are sustainable. Nevertheless, there are initiatives by international NGOs on the impact of fisheries on marine biodiversity. The lists prepared by WWF, Greenpeace and IUCN complement each other and are taken into account by Sonae MC. Along the year, Sonae MC follows the evolution of the mentioned three lists. When launching a new species, we double check with the lists. Species simultaneously referenced by 2 NGOs are not commercialised.

Sonae MC provides the largest portfolio of seafood species and believes that it is important to avoid the consumption of a few species. At stores, a traffic light system is provided to help consumers choose the species regarding their environmental impact. An annual report allows the assessment of our degree of sustainability. Specific provisions are included in supply contracts to include sustainability criteria.

Sonae MC does not accept producers with illegal fishing practices, values fish from sustainable sources, and contributes for the reduction of the consumption of threatened species. We are working to provide more traceability information to consumers.

Sonae MC is working to achieve a chain of custody certification in 2020 for important products, such as dried codfish, hake, redfish, and salmon. Codfish and hake are considered important products for Portuguese gastronomy. Redfish and salmon are fast-moving consumer products. These products come from certified suppliers (ASC and MSC).

## Session II: Seafood Value Chain, Environment & Market

### - Experiences of the Value Chain

#### • Q&A

Q: Would it not be easier if European management moved towards globally accepted sustainability standards rather than having its policy decided in a political process?

A. by Sofie Smedegaard Mathiesen: It would probably be easier, but it would not guarantee more sustainable fishing at a local level. Around the world, there would be different views on how to manage your own fisheries and your ecosystems. A regional/local management is required.

Q: Does losing MSC certification have a negative impact, when compared with the initial certification costs for the fisher?

A. by Sofie Smedegaard Mathiesen: It depends a lot, if the fishery being suspended from MSC has another certified fishery client. If all fisheries are losing their certification, most buyers will still want the fish in their markets anyway. In other situations, retailers are accustomed to MSC certification, so fishers struggle to have access to the market.

Q: I assume that, for you, the benefits outweigh the costs, otherwise you would not be certified. Can you comment on that?

A. by Sofie Smedegaard Mathiesen: The main reason is for members to have access to the markets. MSC is the best standard available with credibility on sustainability. Still, MSC is not always set at a point that acknowledges EU management practices.

Q: Do you have any figures showing the difference in the ratio/return from those who supply the Sustainable Seafood Coalition retailers to those who do not?

A. by Mike Mitchell: It is difficult to quantify commercial return for sustainable practices. In the UK, all of the major retailers, with the exception of one, are members of the Sustainable Seafood Coalition. If you want to supply a UK retailer, you have to be compliant with the Codes of Practices, so there is no premium. It is a prerequisite to sell products to large businesses.

Q: The claim hierarchy seems like a large challenge. Is it the main goal to have “sustainable” on the label than “responsible?”.

A. by Mike Mitchell: In practice, the claim hierarchy has not proved difficult. There are two types of claims. In consumer testing, the claim for sustainability has the strongest value. Not every product is eligible to carry a sustainability claim. There aren’t any aquaculture products that could carry that claim. Seafood brands and retailers like consistent messages, almost all UK retailers go for a 100% responsible sourced seafood portfolio. To have all the product categories carrying the same message, you have to opt for the responsible claim.

Q: Do you believe that third party auditing certification would be an appropriate response for at sea human rights claims in the market?

A. by Mike Mitchell: I do not believe that seafood brands and retailers would wish to make a claim about human rights. To be able to say that there was no slavery in the production would be a very shocking admission on the status of the world. It will never be a consumer facing claim. But, for business assurance, it is important to have tools in the box. Fleet-based certification is one of the developing schemes, for example, the Responsible Fishing Scheme. Human rights, even on land, are difficult to audit. A number of audited and certified terrestrial factories in other sectors have found to have human rights abuses. Third party certification is one of the ways, but more tools are needed to listen to the workers’ voice in the fishing industry and to detect danger signs. The at sea is particularly susceptible for human rights abuses. It is difficult to inspect and visit.

Q: Where can we find a list of existing ecolabels available? Which of them include social aspects?

A. by Ondina Afonso: We use a Traffic Lights System, which is based on the practices of fishing. In Portugal, there are many artisanal fishers. This information is provided in large stores in large cities. Consumers are requesting more and more information about origin and other information, even though sometimes they do not know how to interpret that information. At the end of the year, we assess the quantities sold, which provides information on the types of consumption.

Q: The European labelling method could reduce costs, increase labelling and boost sustainability?

A. by Mike Mitchell: There are challenges surrounding this. The EU has responsibility for managing the fisheries. Under a EU method of certifying sustainability, some European fishers would not qualify. There would be a sustainability ecolabel that endorses sustainability for some European managed fisheries, which puts the EU in a compromised position and some conflicts of interests, taking into account the role of managers and certifiers.

Q: If politicians follow ICES advice, would that not be in line with MSC advice?

A. by Sofie Smedegaard Mathiesen: Normally, it depends on the status of the stock. If there is a TAC in line with ICES, the fisheries could still be suspended, because it is under the MSC reference points.

Q: Will Sonae MC extend the certification to other species, namely wild fish from the Azores?

A. by Ondina Afonso: Sonae MC is focused on the previously mentioned four species. It will be reviewed the following year, so it not possible to list additional species yet.

Q: How is socio-economic sustainability valued in certification? Most of the fisheries products marketed in the EU come from producers from third countries, how can these producers be certified on equal terms?

A. by Ondina Afonso: In Portugal, there is a large consumption of fresh fish. Imported fish is frozen fish. With projects, such as seabream farming in the Algarve, the objective is counter the trend of imports. For frozen products, there is a partnership with specific labs from third countries that help us certify and audit these producers. For example, shrimp imported from Africa. The quality department also has a checklist. Sonae MC has a team that goes to the suppliers to validate the document sent. The partnership with local labs aims to guarantee that the purchase products respect sustainability, including the social elements. Without these partnerships, it is not possible to guarantee responsible sourcing.

Q: Do you have a real-life example where ICES advice was followed, but was not MSC certified?

A. by Sofie Smedegaard Mathiesen: There was a situation with codfish from the North Sea that was suspended from the MSC standard, but that was still a legal fishery and with quota in line with the ICES advice. For a fishery client, it can be frustrating and difficult to explain having a fishery that is legal and in line with ICES advice, but that the status of the stock does not allow MSC certification.

Q: ILO C188 can be considered as standard for social ecolabels?

A. by Mike Mitchell: Agrees that ILO C188 is already being used to underpin the early stages architecture of schemes to certify social justice and human rights. In the same way that the FAO Code of Conduct has become the basis of many responsible fishing certification, ILO C188 will become the basis for human rights assessments in the fishing sector.

## Session II: Seafood Value Chain, Environment & Market

### - Environmental Benefits & Impacts:

- **Dr. Eva Papaioannou, Postdoctoral Research Associate, Helmholtz Centre for Ocean Research, GEOMAR - [Presentation](#)**

For the the role of ecolabels to be fully realised, it is crucial to establish the characteristics such ecolabels should possess for maximising benefits and minimising impacts on the marine environment. To that end, it is necessary to review the strengths and limitations of current fisheries' certification schemes in order to propose improvements and discuss the role of policy and the market in promoting and implementing sustainable fishing ecolabels.

Current ecolabelling schemes assess fisheries' sustainability based on three core principles: 1) the status of targeted fish stocks, 2) environmental impacts of fishing, and 3) the effectiveness of management framework. To determine the effectiveness of ecolabelling schemes, we review how MSC-certified fisheries perform against these three key principles. We assess n=174 MSC-certified fisheries for the year 2019.

In relation to principle 1 "Status of targeted fish stocks", preliminary results suggest that a high number of certified fisheries had either a fishing mortality (F) above  $F_{msy}$  or a biomass (B) below  $B_{msy}$ . Truly sustainable fisheries, namely those with both  $F < F_{msy}$  and  $B > B_{msy}$  accounted for approximately 56% of certified fisheries, with the remaining 46%, a considerable percentage, failing this requirement.

With respect to principle 2 "Environmental impacts of fishing", results indicate that the majority of certified fisheries (n=76), used bottom-touching trawl gear, with the contribution of more sustainable fishing practices being small. Past studies also indicate that certified fisheries were often associated with the bycatch of endangered, threatened and protected species, evident also in fisheries with strong management plans. In some cases, the impacts of certified fisheries on marine mammals' population was comparable to those of non-certified fisheries. This is an important aspect to be taken into consideration in the context of the ongoing review of the Fisheries Standard of the MSC. Consistency in the definition of "endangered, threatened and protected species" could be helpful, but the local specificities of a population must be considered.

For improving current ecolabelling schemes and ensuring that they make an actual difference, it is essential that only truly sustainable fisheries are certified. Certification should be suspended/withdrawn, if stocks show signs of overfishing and exceed MSY levels. For overfished/depleted stocks, certification should only take place after clear signs of recovery (as

opposed of certifying and placing conditions). With respect to environmental impacts, certification should be suspended/withdrawn, if a fishery uses destructive gears and/or takes place within MPAs. Cumulative impacts and climate change impacts should also be considered, in line with the objectives of the new EU Biodiversity Strategy.

It is important to note that fisheries of considerably different sustainability standards may carry the same certification, compromising the role of ecolabels, as truly sustainable fisheries have no comparative advantage. This can lead to the loss of consumers' trust and create market distortions. In each case, it is important to ensure that limitations of certification schemes are clearly communicated to consumers, otherwise there might be a loss of trust and negative impacts on retailers and shops.

As for the role of policy, in many cases policy provisions (e.g. EU Common Fisheries Policy) are stricter than ecolabel criteria. To that end, it is important to remember that changes by EU Ministers in quotas will have implications on certified fisheries. An increase in quota allocation might lead to a loss of premium for certified sustainable fisheries. An increase in quota might also promote overfishing, and as a result, a certified fishery might choose to withdraw from the certification programme.

The role of the market is to orient purchases at above simple rules and only accept ecolabels that exclude overfishing and destructive gear. The market must also promote the diversification of target species and the development of markets for secondary species that are currently of low commercial value.

## Session II: Seafood Value Chain, Environment & Market

### - Environmental Benefits & Impacts

#### • Q&A

Q: Thank you for highlighting the need to continuously develop systems to protect all marine life. It is important to consider the development of new technologies within the industry than ecolabels. Climate change is changing fisheries as we speak. In order to keep sustainable fisheries, it is necessary to continue working on this.

A. by Dr. Eva Papaioannou: It is a very important point. With the shifting abundance of fisheries, these are elements to consider. It is important to remember that the levels of MSY are set assuming stable conditions.

Q: The presentation did not show the impact of certification. It might show the impact of fisheries. If you disregard the issues raised in a management context, the interesting thing would be to understand what happens as a result of certification. Certification drives change. For example, fisheries need to reduce their footprint on target stock or on by-catch. Have you done such an analysis? Did you do analysis of other certification schemes? Your conclusion that EU policy is more stringent was actually said to be the other way around.

A. by Dr. Eva Papaioannou: The presentation was a more global context from the perspective of the consumer. Specific fisheries might demonstrate progress on specific objectives. It is important to remember that, when discussing sustainability of resources or of ETP species, there are limitations that might emerge. I was not involved in the analysis of other certification schemes, since MSC is the most visible and more taken up by the industry. The EU's policy is more stringent in several perspectives in relation to stock sustainability and ETP species.

A. by Sofie Smedegaard Mathiesen: It depends on what aspects of the fisheries are being considered. In some points, MSC can be more stringent, and in other it can be the EU's policy.

Q: As a dynamic analysis, it was not entirely clear the reply.

A. by Dr. Eva Papaioannou: It is not so much a dynamic analysis. The presented information is a snapshot of the situation at the end of 2019 for the certified fisheries with reference to targets and objectives of fishing mortality and biomass at MSY levels.



## Session II: Seafood Value Chain, Environment & Market

### - Market Benefits, Costs & Limitations:

- **Dr. José Luis Fernández Sánchez, Professor, Business Administration, University of Cantabria - [Presentation](#)**

Ecolabels of seafood products are certificates granted to products that have been obtained generating the least possible impact on marine ecosystems. Still, in order to achieve environmental sustainability, the importance of economic and social sustainability cannot be forgotten. Behind the fishery and aquaculture sectors, there are people and companies.

On the benefits of ecolabelling, it allows consumers to easily identify eco or green products in the market, reducing information asymmetries and transaction costs, meaning less costs searching for these products. It is a marketing tool for product (vertical) differentiation and customer segmentation what allows to achieve an economic benefit or higher price (price premium). Environmental certification provides a positive signal to external stakeholders what can improves the corporate image of firms, increasing their reputation and, consequently, firms' sales and revenues. In some cases, it serves as a market entry barrier for current and potential competitors (e.g., in store spaces, imports...) that allows to maintain or increase firms' market shares. In other cases, it allows entry into new profitable markets (e.g., HORECA channels, developed countries...), increasing firms' sales and revenues.

On the disadvantages of ecolabelling, environmental certifications have administrative or management costs (before, during, and after the first audit). These costs can be very high for small firms or producers. An environmental certification requires a high organizational effort for firms or partners in the project for its implementation (e.g., controls, inspections...).

Under a first empirical analysis (case 1), a questionnaire regarding the implementation of ecolabels and other certifications was sent to several companies in Europe from the seafood supply chain. The number of replies was small, so it is not statistically relevant. Nevertheless, due to the lack of studies, it provides an idea on the implementation of labels. One of the questions was the reasons for implementation of product labels or certifications. The major reason was the improvement of the firm's reputation. Another was the customers' pressure, mainly for processing and trading companies. Then, entering new markets. As for problems to implement product labels and certifications, the main reasons were the certification costs and administrative costs. For large companies, deciding on the label was also a significant issue. Concerning the main reasons why firms have not decided yet to implement product labels or certifications,

administrative work and certification costs were the main reasons. For smaller companies, it was also the lack of sufficient information. On the product label or certification effect on firms' revenues and profit margins, for some aquaculture and fisheries companies, there was a contribution above average. For smaller companies, there is less benefit in certification.

Under a second empirical analysis (case 2) on the relationship between ecolabelling and firms' performance, for Globefish, a sample of Spanish companies from the seafood industry with and without the MSC certification were identified in the business database SABI. In 2005, none of the companies had MSC certification and, by 2010, the majority did. Through different statistical methods, it was demonstrated that the moment of MSC certification, the company would see an increase on return on assets of 2%, so a positive effect. The effect on return on sales was also positive at around 2%. The effect on market share is positive, but not significant.

Under a third empirical analysis (case 3), to be published soon on Marine Policy, the impact of MSC certification on octopus from Asturias was analysed. The study is focused on price premium. There is an ample evidence that confirms the existence of price premiums in the retail market for eco-labelled seafood products. However, there is still little research demonstrating the existence, and extent, of price premiums at the producer or fishers' level. Small-scale or artisanal fleets need to get price premiums to compensate their higher costs from eco-certification. Our findings corroborate the hypothesis of a price premium for MSC-certified common octopus from Asturias (Spain). The price premium is between 15.2% and 24.6%, depending on how this premium has been estimated). It agrees with the values found in other former papers.

The artisanal fleet of octopus in Asturias, Spain started MSC certification in 2014. Since 2016, all the products were sold as MSC certified. There is a statistically significant difference in price since 2016. A price premium between 1.05 and 1.11 €/kg (15%-25% over the non-eco-certified octopus from Asturias). The total cost of the project was €43,974.5 from different sources and partners. This product is limited to sales of 100 tonnes per year. With a 1€ premium, in four years, the benefits are €400.000. Therefore, this project was economically beneficial for the operators.

## Session II: Seafood Value Chain, Environment & Market

### - Market Benefits, Costs & Limitations

#### • Q&A

Q: Thank you for the presentation and the empirical case studies that illustrates the better economic performance due to MSC certification. Looking at changes overtime is critical to assess impact, which was lacking in the previous presentation by GEOMAR. Will you say that the last case demonstrates that small-scale fisheries can assess certification programs and benefit from these?

A. by Dr. José Luis Fernández Sánchez: The results of this study and other previous studies demonstrate that there can be a premium for producers. This is the only study focused on small-scale producers, so it is not possible to generalize. It is important to keep in mind that it is a small artisanal fishery. It was the first one to be certified by MSC. It is no longer the only one, since an Australian octopus fishery was also recently certified, which produces 300 tones. It demonstrates that small-scale fisheries are entering into eco-certification, mainly MSC. It is not an effort done only by the fishers, but in collaboration with FLAGs and funding from the EU and national governments. It provides benefits to the local communities on environmental and socio-economic levels. It allows for small coastal communities to maintain their activities.

Q: Would you say that the cooperation between the different ports was also an impact? Or was that pre-existent?

A. by Dr. José Luis Fernández Sánchez: Before 2014, the octopus of Asturias was already produced in a sustainable way due to a sustainability plan implemented by the government of Asturias. It is a product that is produced in a sustainable way with important quality characteristics. The problem was the lack of visibility for sales. It was not able to differentiate from the octopus from other ports. This product is exported to processing companies and sold in large markets, such as USA and Japan, where the MSC label can provide important visibility. The label provides economic benefits for the producers.

Q: In comparison with Nordic markets, like Germany and the Netherlands, third-party certification in Spain is still largely underdeveloped in favour of self-certification by industry and retail. Do you have an idea why? Is this situation changing?

A. by Dr. José Luis Fernández Sánchez: In Spain, producers are increasingly looking into eco-certification. Not only for octopus, but also for anchovies, tuna, and sardines. It is an increasing trend.



## **Session II: Seafood Value Chain, Environment & Market**

- **Session Closure**

- **Benoît Thomassen, Chair of Working Group 3, MAC**

The session provided very detailed and interesting analysis. The final session will focus on the consumers' attitudes and the environmental footprint. There will be a presentation of various sustainability schemes. As a last point, there will be presentations on animal welfare.



### **Session III: Sustainability and Farm to Fork Strategy**

#### **- Session Opening**

- **Benoît Thomassen, Chair of Working Group 3, MAC**

In the past two days, the focus has been on the theoretical context in which the sustainability claims were inscribed. A practical analysis of the different impacts, advantages and disadvantages of these claims for the various actors of the value chain also took place.

The focus of the third session will be on the ecological footprint as well as on consumer attitudes.

Afterwards, there will be a short presentation of five sustainability schemes for seafood products. This panel will be moderated by Mr Chris Davies, former Chair of the EP PECH Committee, who will lead the discussion by asking on the issues, impacts, and development of the schemes.

The session will conclude with two presentations on animal welfare.

### Session III: Sustainability and Farm to Fork Strategy

- **Consumer Attitudes:**

- **Dr. Sterenn Lucas, Lecturer, SMART-LERECO, Agrocampus-Ouest - [Presentation](#)**

The consumer evolves in a very specific market and it is necessary to see in which market the evolution takes place. At European level, the number of new seafood products with sustainability claims varies among countries. Sustainable claims on products can vary, for example organic production, carbon neutrality, sustainable packaging, and animal welfare. In the UK market, the number of products launched with and without a sustainability claim is essentially the same. In France and Germany, the number of products with claims is significant, while, in Spain and Italy, the vast majority does not include sustainability claims.

Seafood products launched in the market with sustainable claims are increasing across all European countries, but with heterogeneous contents, differences between countries and between species. For example, there is a strong positioning in the EU of sustainability focused on environmental footprint, but animal welfare is less taken into account by consumers. The markets driven by sustainable claims on seafood match with a higher sustainable consumption acceptance in general. In markets where consumers generally look for sustainability claims, this will also take place in seafood products. Multiple dimensions in sustainable claims and the use of sustainable claims puts environmental issues in competition with the other attributes that are taken into account in consumers decision-making.

Regarding the consumers' motivation to purchase sustainable products, sustainable claims inform the consumer on the environmental impact of the product they buy. There is also a confidence attribute for the product, since, without information, the consumer will not be able to make a choice to buy sustainable products. If the consumer trusts the information, they will be prepared to pay a higher price. Still, consumers face multiple information on diverse attributes, such as sustainability, health, convenience, natural, sociodemographic, fair trade, among others. Sustainability is an important attribute for a segment of consumers, but also health claims, which interacts with sustainability preferences. The convenience is also fundamental, since seafood products are considered to be complex to consume on a daily basis. In relation to natural characteristics, there is no consensus on the acceptability of GMOs by consumers. On the motivations for consumers to buy more environmentally-friendly products, there are two main criteria: environmental preferences and health preferences. These motivations are affected by the degree of altruism of the consumer. There is a fundamental link

between these two dimensions. If these are separated, it will depend on the degree of altruism. Generally, eco-friendly are more expensive to produce, so it is seen as a sign of quality.

Regarding the consumers' willingness to pay for sustainable products, consumers declare willingness to pay a higher price, but, on the market, that does not always happen. Behaviours vary according to countries. There are differences between species, since species have different attributes and consumers are prepared to pay more. The differences vary from 5 to 15%. There are differences based on the different sustainability attributes. It is important to inform the consumer on the sustainability dimensions, in order for the consumer to be willing to pay a higher price. The profile of a consumer products labelled as sustainable is usually female, urban, higher professional category, 40 to 55 years old. Consumers are ready to pay more for eco-friendly frozen products, because labels are present on these. In all European countries, there are consumer categories that are willing to pay more for environmental attributes.

When it comes to favouring sustainable claims in the European market of seafood, there are barriers for sustainable consumption, such as income constraints, the multiplication of information levels and of their understandings, and the trust in certification schemes.

In order to stimulate consumption of products with sustainability claims, it is necessary to help consumers understand environmental issues linked with seafood, a simplification of the information, for example through one European label on sustainability, and incentives to change consumer behaviour.

### Session III: Sustainability and Farm to Fork Strategy

#### - Consumer Attitudes

##### • Q&A

Q: Would you have any research on the loss of certification for an important stock and the effect on the retail price paid by the consumer?

A. by Dr. Sterenn Lucas: I do not have elements on that. When considering certifications, consumers do not have a lot of information on MSC and do not have knowledge regarding withdrawal of certain stocks from certification. If there is a withdrawal, the consumer will question the entire label. When it comes to certification trust, it is necessary to look at what extent consumers know the label. In France, consumers do not know MSC, even though it is the most used. Consumers will name Pêche Durable, the official label of the French government. If there is an adverse effect on one certification, consumer will mistrust the label and reject it.

Q: How could policy promote the use of ecolabels?

A. by Dr. Sterenn Lucas: In order to promote ecolabels, it is necessary to work on consumer information. It is necessary to inform consumers on what is at stake and the price differences. Consumers need to trust that all the chain respected the criteria of the label. It is necessary to inform on the environmental background of seafood products. There are other methods to facilitate behavioral changes.

Q: Do these labelled sustainable products risk being only “niche” products for those who can afford?

A. by Dr. Sterenn Lucas: Of course, one of the main barriers is the costs. Still, in some markets, like the UK, there are more and more products with sustainability claims and it is becoming the norm. It is necessary to have price ranges in place and focus on those willing to pay more, but also make sure that others are not left out. It is necessary to make sure that there are affordable seafood products.



Q: Would a system where the consumer can access the information for themselves be an improvement? For example, through a QR code?

A. by Dr. Sterenn Lucas: That could be one solution. On the moment of purchase, it might not be the best moment, since, on average, consumers spend 10 to 20 seconds to choose. It could facilitate access to information after the purchase. Consumers could receive more information and motivate them to buy again.

Q: Where was the research carried out? Supermarkets? Or also other locations, such as fishmongers, markets, and restaurants?

A. by Dr. Sterenn Lucas: Most of the work quoted was about at-home consumption. Consumers should also be more informed in restaurants. A significant portion of fish is consumed outside the home.

Q: It is interesting that you observe that, in the eyes of the consumer, the withdrawal/suspension of a certificate puts the credibility of the certificate at risk, while we would believe that the fact that can be and is withdrawn if sustainability criteria are no longer met would drive the trust of consumers. In any case, all international credibility benchmarks take this as a starting point. Can you comment on that?

A. by Dr. Sterenn Lucas: If the certification body reacts to non-sustainability on a particular fishery, it can be acceptable for consumers. The most damaging would be criticism by third parties and no reaction from the schemes. If the certification body reacts, this would be positive, but this is for a well-informed consumer. Only 30% of French consumers know MSC. There is a lot of information coming to consumers, but they need to be educated.

### Session III: Sustainability and Farm to Fork Strategy

- **Environmental Footprinting:**

- **Product Environmental Category Rules for Marine Fish for Human Consumption: Henrik Stenwig, Director Environment & Veterinary affairs, Norwegian Seafood Federation - [Presentation](#)**

In 2013, the Commission launched the Single Market for Green Products Initiative for sustainable production and consumption. In April 2013, the “Commission Recommendation on the use of common methods to measure and communicate the life cycle environmental performance of products and organisations” was published. The European Commission proposed this as a common way of measuring environmental performance.

This was brought forward with the European Green Deal, which states that “reliable, comparable and verifiable information also plays an important part in enabling buyers to make more sustainable decisions and reduces the risk of ‘green washing’. Companies making ‘green claims’ should substantiate these against a standard methodology to assess their impact on the environment. The Commission will step up its regulatory and non-regulatory efforts to tackle false green claims”. The project is currently in the transition phase.

The development of a Marine Fish PEFCR started in 2014 as a part of the second wave of PEFCRs pilots. It continued until May 2016 when it was decided to stop the process due time-constraint as it was unmanageable to finish within the timeline of the Pilot phase. In January 2019, DG ENV and DG GROW issued a call for volunteers to develop new PEFCRs or OEFSRs. In October, the project to develop a PEFCR for Marine Fish for human consumption was accepted by the Commission and it is now one out of five projects to develop “new” PEFCRs in close co-operation /supervision by the Commission.

The Technical Secretariat is composed by a wide range of associations. The goal is to develop a consistent and harmonized set of rules to calculate the Environmental Footprint Profile of Marine Fish Products while engaging with actors and stakeholders in the value chain of food production and consumption. A PEFCR is developed according to a PEFCR Guidance document that defines the requirement to the organisation and the process of developing a PEFCR. PEFCRs should be developed and written in a format that persons with technical knowledge (in LCA as well as with regard to the considered product category) can understand it and use it to conduct a PEF study.



The scope of the PEFCR is marine fish for human consumption in the EU market. This scope is considered as wide as there are a single main function but different applications, technologies, materials. The aim of the definition of the scope is to include all products that are capable of fulfilling the same function, and to avoid a narrow scope (product category) definition that would result in a very large number of PEFCRs diminishing the usefulness of the developed PEFCRs.

The Functional Unit of the Marine Fish PEFCR is 1 kg, including packaging. The product should be appropriate for human consumption and these are products for which durability or shelf-life is established. The process includes public consultations of the drafts. In terms of scope, feed is important for farmed fish and the data is calculated by the feed PEFCR. The boundaries for the Marine Fish PEFCR include the fishing and aquaculture production, preparation, distribution, retail and consumption. Processing is not included in the scope.

We consider the PEF method as an important and useful tool to assess and document the environmental performance of seafood. The members of the Norwegian Seafood Federation experience increased demand for documentation of environmental performances from the customers, the consumers as well as the financial institutions and the stock markets. The major challenge is that the accounting system for environmental performances is not standardized and it is difficult to compare the various documentations and reports. And last, but not least: The PEF is considered as a useful tool to find the environmental hot spots in your own production and thus how to prioritize the measures to improve the performance.

There will be two public consultations. In August, a web site will be opened with detailed information on the process including an invitation to stakeholders to register. We invite all stakeholders to get involved.

### Session III: Sustainability and Farm to Fork Strategy

- **Environmental Footprinting**
  - **Q&A**

Q: How will the result of this work feed into labelling schemes, for example MSC?

A. by Henrik Stenwig: This work is focused for the European Commission. Consumer communication is not part of the work. The ambition, as referred by the European Green Deal, is that the calculations will serve as basis for sustainability labelling in the future. It is a very complex area for consumers.

### Session III: Sustainability and Farm to Fork Strategy

#### - Environmental & Social Sustainability Schemes (Panel Discussion):

- **Moderator: Chris Davies, Former Chair of EP PECH Committee**
- **Ecolabel Pêche Durable**: Monique Tran, Fisheries and Aquaculture Sector Delegate, FranceAgriMer
- **Responsible Fishing Scheme**: Helen Duggan, Head of RFS Transition, SEAFISH - [Presentation](#)
- **Best Aquaculture Practices & Best Fishery Practices**: Melanie Siggs, Director of Strategic Engagements, Global Aquaculture Alliance & Global Seafood Assurances - [Presentation](#)
- **Responsible Tuna Fisheries Standard (APR)**: Dr. Julio Móron Ayala, Managing Director, OPAGAC - [Presentation](#)
- **Marine Stewardship Council**: Camiel Derichs, Program Development Director, MSC

Chris Davies: Listening to debates since 1999, it is not the first time that ecolabels are discussed, particularly if the European Commission should introduce a label. Some of the schemes look at environmental sustainability, while other focus on social factors.

Monique Tran: FranceAgriMer is a state body and the main missions are to provide information to the sector, organise information, and support the sector. Following major public discussion, an ecolabel commission was set up in 2012 and the certification scheme was established at the end of 2016. The first certified fish was in 2019. It is a popular label among consumers with a strong cultural presence in France as a sign of quality. All the supply chain can be involved and get the label. The label is public, so the public dimension is very important. The label works on the three dimensions of sustainability. There are prerequisites to be met connected to the respect for the environment, but also on remuneration and security in the income as well as remuneration of the chain. The aim of the label is to improve the whole chain and move towards more ambitious objectives.

Chris Davies: Where do you see the scheme going? How much recognition does it have from consumers? It is a French scheme, so do you expect wider application?

Monique Tran: The last image barometer with consumers demonstrated that it is widely known among consumers. Half of consumers know the labels. Since it is a public label, consumers trust

it, even if they do know the requisites in detail. In terms of work, it is mostly focused on the certification of French products and operators. It requires working with operators that comply with the environmental dimension and consultation with the public institutes.

Helen Duggan: Our work in responsible sourcing recognises the challenges that the industry faces in an increasingly competitive marketplace with public concern regarding human rights practices, welfare, and environment. RFS was developed to recognise crew welfare and responsible catching practices. Back in 2014, it was clear for the UK industry that there was a gap in supply chain assurance schemes for wild capture seafood. By 2018, 120 vessels certified from all the UK sector. With the industry support, the scheme was very successfully quickly. As non-departmental government body, Seafish was not the appropriate place for a certification scheme in the long-term. Therefore, they established an agreement to transition the scheme to GSA. For the past two years, they worked in partnership to develop the Responsible Fishing Vessel Standard. It was developed with open, robust and transparent development process with input from all sectors of the seafood industry. The certification remains voluntary and vessel-based. It is a B2B-facing scheme, so the logo is not used in consumer-facing, but that might change with GSA. Greater focus on crew welfare, underpinned by ILO Convention.

Chris Davies: This is a scheme not addressed to consumer, but more to seafood companies and to retailers. It has been very based in B2B?

Helen Duggan: It is definitely based in B2B. The industry was looking for a practical mechanism through which could recognise the companies committed to best practices in the supply chain. It is important to differentiate between legal compliance and best practices. This provides a way for the supply chain to support committed producers.

Chris Davies: Would companies go to you, particularly the larger skippers, because retailers wanted these assurances? Why would someone not want to bother with this certification?

Helen Duggan: For Seafish, it was about supporting industry by making it available and allowing market adoption as appropriate. The market policy of larger retailers that need a practical assurance mechanism to differentiate between vessels and operators is considered. It is about recognising and supporting best practices in the industry.

Melanie Siggs: The Global Aquaculture Alliance deals with aquaculture and farmed seafood and owns standards called Best Aquaculture Practices. There were a number of gaps in the assurance of wild caught seafood, so it was an opportunity to start working with Seafish. The association Global Seafood Assurance was created. The Responsible Fishing Vessel Standard is the first

standard created to fill one of those gaps. GAA is registered as a non-profit in the USA, but consider themselves to be global. They noticed gaps in vessel standards, particularly crew welfare. The atrocities documented by NGOs and press of bad crew welfare have been in the public eye for a while now. There are examples in Europe and in other fisheries that touch the EU's supply chain. It is not appropriate to only certify for environmental best management. There are some challenges surrounding COVID-19 related to training auditors and getting on board vessels, but are working on it. Several pilots will be set-up until the end of the year in major tuna fisheries around the world. It is underpinned by ILO Convention 188. It is an opportunity to use standards to ensure compliance. The other gap was the lack of a unique seafood processing plant standard. The aquaculture standard was adapted for wild caught. The goal is to create seamless, end to end, assurance for seafood, connected with good traceability. It requires significant management and inputs to maintain a standard. Standards are an important tool to create changes. On aquaculture, there many global assurance standards, but, in fisheries, there are some gaps. No intention to replicate the work of MSC on environmental certification, but hope to cooperate with them. The Seafood Processing Standard provides enhanced social, health and safety accountability.

Chris Davies: To what extent are you global? The majority of standards will be taken up by European and American companies, but most problems are in Asian fleet. Will you promote the standards in those areas?

Melanie Siggs: Absolutely. Based on their global aquaculture knowledge, we already have teams of people working in different areas around the world to develop in a linguistic and culturally appropriate way. Auditors are being trained accordingly. We are doing a series of pilots around the world to ensure that it can be delivered on a global level.

Chris Davies: How much resistance do you get? IUU fishing accounts for a significant amount of seafood. There are slavery conditions and observers being killed. In order to make the scheme effective, you must engage with people that want to avoid the rules.

Melanie Siggs: You have to start. The first option is to create consensus on best practices and then take it to the market. Then, they must ensure that their marketplace do not have these atrocities. You work with NGOs that are building fisheries improvement projects. Now we are building social improvement projects. It is a continuous network and model of change. The standard is not automatically accepted. It is built by degrees, while working in parallel with NGOs, governments and the European Commission.

Dr. Julio Móron Ayala: APR is a private public certification scheme for tuna fisheries by AENOR, the Spanish certification association. It has five pillars: 1) maritime safety, taking into account IMO identification and reference number assigned to the vessels, registration and insurance), 2) least ecosystem impacts code of good practices, which can be with human or electronic observers, 3) fishing activity control, through VMS, catch documentation, logbook, 4) best sanitary standards, based on the EU's legislation, and 5) best labour conditions, which is based on ILO Convention 188. The convention has been ratified and entered into force, but is not widely accepted yet. 47 vessels have been certified from different countries. It is absolutely for any ship-owner and is certified by a third party. It focuses on the three pillars of sustainability.

Chris Davies: Is the label addressed to consumer or for retailers?

Dr. Julio Móron Ayala: It is directed at consumers. The standard certifies the chain of custody and the canning companies. In Spain, there are over 10 million cans certified in over 9000 supermarkets.

Chris Davies: A fisher that seeks MSC certification, which has different requirements, cares about sustainable fishing, so they would also provide proper conditions to their crew, no? The slave operators are not fishing sustainably and do not look after their crews.

Dr. Julio Móron Ayala: Recently, an observer was killed on board a vessel that was MSC certified and the vessel was removed from the scheme. OPAGAC is also working on MSC certification. These certifications are not against each other, but are complementing each other. Sustainability has always been linked to environmental sustainability alone. This demonstrates that environmentally sustainable fish does not mean that it is social sustainable. The three elements of sustainability must be considered. Both elements should be as robust as possible for consumers.

Chris Davies: MSC certification does not cover some important matters, even though it is probably the best standard, covering around 14% of the world's fish.

Camiel Derichs: MSC is part of a solution for a global challenge, but it is not the only part and is working with many stakeholders and initiatives. Twenty-five years ago, when MSC was created, it was when overfishing topped the world's agenda, including the creation of the Code of Conduct for Responsible Fisheries. That code was a voluntary global code. MSC was a standard modelled on this code of conduct, as a tool to drive the uptake. MSC is a mission-orientated association. We want sustainable fishing, while contributing for the health of the world's oceans and those who depend on it. It is an environmental standard. At the same time, if your stocks are in order



and your ecosystem impact is limited, you will provide socio-economic benefits. The environmental standards have a strong link to the other elements of sustainability. MSC provides value and rewards the best performing fish in the marketplace and hopes to inspire other fisheries to improve. The approach works in practice, but there is a lot of work behind it. MSC is a standard-setter. The standard for sustainable fishing is linked to products that carry an ecolabel, which is recognised by consumers in the marketplace. It is not a static program, the standards have evolved according to global best practices and science. There are three pillars behind MSC: stocks at MSY level, low environmental impact fishing, and management systems evaluation. MSC does not certify, it only sets standards and certification is done by third party impartial accredited assessors through a robust public process.

Chris Davies: Does the MSC consider vessel conditions and other social aspects?

Camiel Derichs: It actually is considered by MSC. It is not well known, but MSC standards recognise labour conditions in seafood supply chains. Our chain of custody standard has a risk-based filter. High-risk countries are expected to meet recognised third-party labour standards. All fisheries need to meet requirements and demonstrated that there is no forced or child labour. Moreover, MSC has publicly said that they monitor this space and has actively supported the Responsible Fishing Scheme, as an emerging credible tool to ensure respect for ILO C188.

Chris Davies: How to avoid confusion? Can the different labels go together?

Melanie Siggs: There are different stages along the supply chain with their own risks and units of standards. For example, MSC developed a very credible and rigorous certification scheme on environmental management. The next complement is to create a standard of equal rigour around the vessels and the crew. These are separate spaces, which are interlinked. We talk with MSC and work together. There is no competition and we are not certifying environmental management of fisheries.

Chris Davies: Dr Julio Móron, are all your tuna vessels working towards MSC certification?

Dr. Julio Móron Ayala: All are working for MSC certification. Our preference would be a public certification, especially at an EU level. This would avoid consumer confusion with so many different labels. MSC is a very good environmental standard, but now we are working on a social standard with a reference, the ILO C188. Any standard developed in fisheries must take that into consideration. Governments will have to ratify the convention and implement it. Assurances to consumers are needed.



Chris Davies: Monique Tran, is the Pêche Durable label complementary to MSC? Do the French fishers prefer to only use your label?

Monique Tran: The labels complement each other. Currently, the ambition of our ecolabel is broader than MSC. There are many common criteria. We need to make sure that we are complementary and that different steps are followed. For us, legislation is the starting point regarding all points. The French public Ecolabel “Pêche Durable” goes beyond the current legislation. The ambition is to cover all pillars of sustainability. The aim is to have a very strict public label. It is reviewed every three years to ensure that the whole chain becomes more aware and ambitious whether with public or private certification schemes.

Chris Davies: There are different organisations and labels, but all are engaging with the same people. At the same time, there are Asian companies that do not engage with these schemes. Is this correct?

Melanie Siggs: Off course, there is a huge mass of companies that we need to go to. This will not happen overnight. It is necessary to start with quality standards, a collective intent, consensus, regulation, compliance, market demand, awareness raising, education, among others.

Helen Duggan: IUU is criminal behaviour, so it is a separate issue. Governments and stakeholders need to work together to address this problem in a different manner. Best practices are a practical mechanism to separate different behaviour. There is appetite among stakeholders to collaborate and harmonise as much as possible. From an UK market perspective, the objective was to keep the complexity as far away as possible from the consumer. There is a space for ecolabel. On social aspects, consumers already expect this, so consumer-facing labels are not needed.

Camiel Derichs: It is important to engage with the good actors. Everyone wants to create value. Regarding the market demand for sustainable seafood, there has been a significant uptake of MSC labelling in Europe, especially in France, in the past few months. In March 2020, Globescan did the largest global sustainable seafood research amongst consumers, which demonstrated that, in France, around 50% of consumers recognise the label. Trust in the MSC ecolabel has gone up to 75%. Even in France, where there are strong domestic initiatives, the MSC label is gaining awareness amongst consumers. Market demand for sustainable seafood is great, but there is a proliferation of claims in the European market. Many of these claims are not backed-up with rigorous standards and transparent processes. Claims delivered should be able to be trusted by consumers.

Dr. Julio Móron Ayala: From the industry side, it is merely a matter of survival. The market is flooded with imports and cheap fish. The only way to survive with the standards required at EU's level is to be recognised as a separate market niche, in order to maintain the running costs. It is not possible to compete with the bad actors. The engagement of bad actors in ecolabelling is, in some ways, letting them compete in unequal terms with EU products.

Chris Davies: The European Commission wants to ensure that environmental sustainability at sea is promoted. It wants to ensure that working conditions, particularly for European workers, are at a high standard. It wants to ensure that consumers have clear information. Should the Commission be introducing an ecolabel? Should it try to coordinate to ensure less confusion? Or should it step back and let the market work by itself?

Melanie Siggs: Use our standards. We have quality benchmarked standards. Standard holders are not making money from standards. It would be great to work more closely with governments, regulators, and the Commission to recognise these standards as part of compliance. Creating regulations for EU fisheries that have a different set of parameters than importing into the EU is inappropriate. We should be saying that imported seafood must come from places where the ILO 188 Convention is respected. Standards can be part of that compliance process to ensure that imported seafood have the same requirements as those produced in the EU.

Dr. Julio Móron Ayala: The marketing standards framework is under discussion in the European Commission. These need to be very clear. At the moment, when you look at a can of tuna, you do not know where it came from and who caught it. Traceability must be clear. There should be the same standards required for imported products than for EU production.

Chris Davies: Should the Commission introduce its own ecolabel?

Melanie Siggs: No. There is no need to duplicate the work done by us.

Dr. Julio Móron Ayala: Yes, we would be more comfortable with a public scheme. It would be very useful with a system of grading based on a set of parameters. Cheap seafood is also needed in the market, so a grading system by letters would be appropriate for different consumers.

Camiel Derichs: No. The Commission should introduce minimum requirements. These requirements should cover the principles, such as robust science, transparency, accountability, stakeholder participation, and rigorous independent verification. It should be applied consistently to all foodstuff in the EU's market. The EU has an important role to play to ensure that requirements are met before claims are made in the market. The current voluntary

legislation directed at consumers' needs to be strengthened. There are minimum criteria, but these are not verified. This should apply to other product information, including point-of-sale claims, guides and other forms of consumer advice. We want a level-playing-field both in and outside the EU. The CFP is a great tool, but is not properly implemented in all of the EU. Many stocks remain overfished.

Monique Tran: Globally speaking, I agree with the others on the protection of consumers and ensuring fair competition. The Commission has already drafted many recommendations and there is a lot of work ahead. The CFP will be under review soon. There are political deadlines that look very promising. Until now, many labels have been launched and great advances have taken place in connection to consumers and sustainability. It is important to have a fisheries policy that integrates all the elements of the European Green Deal.

Helen Duggan: Definitely not. I agree with Camiel and Melanie. It is important to recognise the complexity of the landscape and the hard work done by the key stakeholder groups in the past years. It is important to complement and build on that work, instead of reinventing.

### Session III: Sustainability and Farm to Fork Strategy

#### - Environmental & Social Sustainability Schemes

##### • Q&A

Q: How can you explained such a high awareness of the Pêche Durable ecolabel, when very few products bear this French ecolabel?

A. by Monique Tran: The French Ministry is promoting the ecolabel, therefore, it is quite well known by consumers.

Q: I would like to know if and where I can find an international register or review of existing ecolabels on the fisheries sector.

A. by Melanie Siggs: We do not have fishing vessels certified yet, due to COVID-19 challenges, but as they are certified, we will have a list on our website: <http://www.seafoodassurances.org>. Meanwhile, MSC fisheries are listed on their website. There has been some initial research undertaken by GSA to establish a list of existing fisheries sector certification schemes – I am not sure if this includes ecolabels or not. It is best to contact [rfvs@seafoodassurances.org](mailto:rfvs@seafoodassurances.org) for further information

Q: Helen Duggan, what is your understanding of what constitutes a working hour on a fishing boat?

A. by Helen Duggan: It is Article 14 b) of ILO C188 that should be the reference. The complexity and impracticality of rigid application of this guidance is widely acknowledge. This feedback has been shared with ILO.

Q: Could you indicate how many of the 120 are smaller-size vessels, using static gear, etc.? For example, how smaller-scale fisheries can access and benefit from the Responsible Fishing Scheme? Can you provide examples of environmental advantages from the schemes, such as a shift towards responsible gear, bycatch reduction, etc.?

A. by Helen Duggan: We have endeavored to ensure that the standard is accessible to all types of fishing vessels – the vessel categories and an explanation of how have addressed this can be found in the introduction to the standard here: <http://www.seafoodassurances.org/ProgramStandards/RFVS>. On environment, we have a section that addresses “environmental impacts of the vessel”, which looks at litter, pollution, how PET species are handled, etc. This is then complementary to the scope of the MSC, which addresses how sustainably the fishery is managed.

Q: Do the panelists see the ILO legislation governing working hours for fishers as being compliant in an industry that operates in various conditions and that is not reflective of off-shore-based industries? Also the required spacing of 1.5/2 meters COVID accommodation space in fishing vessels?

A. by Melanie Siggs: On COVID space, I think there is a bigger discussion to be had as to how fishing vessels can address current COVID-19 guides. In some cases, they are isolating together to get around this. Secondly, how might we include such precaution in the future, just as other sectors around the world have to consider this. There are no easy answers.

A. by Helen Duggan: The RFVS is aligned to the approach taken by ILO Convention 188. However, the complexity and impracticality of a rigid application of this guidance is widely acknowledged. This feedback has been shared with ILO. Records of working hours will be kept and will be checked by risk assessment. This is how all countries who have ratified this convention shall adopt it. We recognize that fishing operations can lead to long hours, but as long as the skipper manages the time and work hours to protect the health and safety of the crew, that is the most important. In relation to the COVID guidelines, you may find this page on the Seafish website helpful – provide an overview of guidelines that have been made available: <https://seafish.org/article/working-safely-during-covid-19>

Q: Do you believe that this type of public label lowers costs and can promote a brand linked to sustainability, definitely promoting sustainability, benefiting everyone?

A. by Monique Tran: Yes, they can create brands linked to sustainability. Fair Trade has demonstrated that well over the years.

Q: Melanie Siggs, what were the gaps in the schemes that you identified in the start?

A. by Melanie Siggs: When looking at wild capture seafood supply chains, we noticed gaps/risks on vessels/crews/social and seafood processing, which we have addressed in terms of providing standards built through good governance, but also ports – and UK Seafish has developed a port standard and there is PMSA and Cape Town agreement in place. There may be more gaps, such as animal welfare (addressed in BAP aquaculture standards).

Q: Dr Julio Mórón, can you say a little more about what is included in the concept of “the least ecosystem impacts and Code of Good Practice?”

A. by Dr Julio Mórón Ayala: The Code of Good Practices basically requires use of 100% non-entangling FADs, bycatch mitigation operation and 100% observer coverage, either human or electronic.

Q: Dr Julio Móron, can you explain which elements of your standard are beyond legal requirements? And where we can find a list of certified vessels?

A. by Dr Julio Móron Ayala: The Good of Good Practices, the classification of vessels, and insurance policy. You can consult the webpage, currently under renovation: [www.atundepescaresponsable.com](http://www.atundepescaresponsable.com).

Q: It seems that sustainability standards should include also food safety aspects, which are covered by separate requirements, like mercury, microplastics, and dioxin residues?

A. by Dr Julio Móron Ayala: Exactly. This is why the APR AENOR includes the EU Sanitary Standards.

A. by Melanie Siggs: Food safety is covered in most, if not all of the most widely used seafood industry standards. Research is ongoing, but, at this time, I do not believe it is deemed necessary to consider the inclusion of anything to do with microplastics.

Q: Can the panel give their view on, if in a fishery that 80% is MSC certified and fully compliant, but the 20% in the fishery outside of the certification fish beyond the ICES MSY advice, could there be a danger that the certification is no longer compliant and it may be withdrawn?

A: The problem is that being legally compliant is not necessarily sustainable.

Q: Can you please reflect on how a major social aspect and key policy objective, that of food security and food safety, is taken into account in current schemes? Or is to be taken into account? I am thinking of fish feed fisheries or aquaculture practices using fish feed.

A. by Melanie Siggs: I think we need to discuss this in greater depth, as there are a number of different aspects there. Ultimately, I propose that sustainable, responsible seafood production is critical to nutrition security – FAO estimates a further 34mt needed and EAT Lancet highlights only seafood protein as the enhanced future animal protein – on that basis, if standards help with protecting fisheries, whether harvesting for feed or as food for humans, then that feels a good thing, but they must also address those working in the fisheries

Q: The tuna fishing sector is a global industry with many vessels flagged outside EU countries, even if they are linked to European companies. How would an EU label apply in this case?

A. by Dr Julio Móron Ayala: Allowing foreign vessels that are able to comply with the standards to achieve the certification, as APR from AENOR is doing. It is vessel by vessel certification.

Q: When you say that the Pêche Durable ecolabel goes beyond legislation, can you provide an example? For example, what is the criteria on resources? And where can we find the certification report of the fisheries that are certified?

A. by Monique Tran: You can find the criteria on our website. For example, on the resource, vessels have to be equipped with selectivity equipment to avoid captures of juvenile fish.

Q: Can European law decide to include the respect of ILO Convention 188 as a required obligation to permit the import of fishing products?

A. by Melanie Siggs: They can and that would be great. If we commit to do this in Europe, then we should make it a requirement for imports too.

Q: Are you talking to the national or European social partners to set the levels of compliance with socio-economic sustainability? I only know the example of AENOR responsible fishing certification, which met with employers and unions to set the minimum threshold.

A. by Melanie Siggs: We have captured input from numerous experts on a wide range of international protocols and conventions during the development of the standards. A full list of the nominal references and stakeholders who have been actively engaged in the development process can be found in the introductory section of the standard, which can be downloaded here: <http://www.seafoodassurances.org/ProgramStandards/RFVS>

Q: OPAGAC has the ambition that its responsible fishing tuna standards serve as a basis of a new EU fish import standards, but the five pillars have a strong emphasis on the social conditions and less on ecological standards. How much does this scheme add to existing compulsory rulings on your fleets? And will the APR standard effectively close down the EU market to a lot of the external competitors?

A. by Dr Julio Mórón Ayala: It will not close the EU market to imports, but will require those to comply with minimum standards. Any new member that wants to get the APR certification has to make significant investments to achieve the certification.

Q: I would ask the European Union to consider the non-respect of ILO Convention 188 as IUU fishing.

A: Yes, but the EU IUU Regulation is related to fishing activities and we have to deal with the EU Human Rights authorities.



### Session III: Sustainability and Farm to Fork Strategy

#### - Animal Welfare:

- Doug Waley, Fish Welfare Programme Leader, Eurogroup for Animals - Presentation
- Dr. Krzysztof Wojtas, Head of Fish Policy and Campaigns, Compassion in World Farming

Dr. Krzysztof Wojtas: Certifying for fish welfare is a good thing. Why fish welfare matters? Fish are sentient beings. There is a moral obligation to take care of their welfare. There is a large gap between common perception of fish intelligence and the scientific reality. Most people do not realize how complex fish are and how advanced the science is. There is a problem of empathy due to evolutionary distance.

Fish are sentient beings, as demonstrated by science. There is experimental evidence for pain in fish. There is anatomical evidence for nociceptors in fish, similar to other vertebrates (including humans). Multiple research demonstrates that fish experience emotional-like states, such as fear, anxiety, depression, joy, and pleasure. Therefore, there is a moral obligation to address these when farming fish. There is as much evidence that fish feel pain and suffer as there is for birds and mammals – and more than there is for human neonates and preterm babies. When considering the number of fish involved, every year, we kill around 74 billion land animals for human consumption. At the same time, around 3 trillion fish are killed for human consumption. In EU legislation, there are clear requirements on the welfare of land animals, but none for fish. Fish should be granted the same welfare protections as land animals.

On why fish welfare should be included in certification schemes, there is a moral obligation and certification schemes are at forefront of the industry to demonstrate changes. The number of animals affected would be huge, when considering the largest seafood schemes. Certification schemes have an opportunity to educate consumers. Currently, the choice is quite limited for consumers. On how fish welfare should be included in the certification, there are three possible scenarios: 1) as integral part of the requirements, 2) as an add-on, and 3) as a separate certification scheme. Some schemes do address welfare, but more can be done, since many rules are more connected to health and quite vague.

Doug Waley: The RSPCA welfare standards for farmed Atlantic salmon has been active in the UK for around 20 years. It has been certifying between 60 to 80% of salmon producers in the UK. More recently, they have launched trout standards, certifying around 80% of the production. The intention is to become technical partners for producers implementing high standards. The scheme covers farm management, health, medical treatments, mutilations, handling, cradling, equipment design and installation, feeding methods, feed withdrawal regimes, environmental quality, water quality, lightning, environmental impacts, husbandry practices, stunning and handling at the time of killing. There has been close collaboration with producers, including to close gaps in knowledge. The guidelines provide very specific criteria, which is a practical tool for the farmers to use.

There are input indicators that measure the resources needed to achieve good welfare, such as water quality parameters, feeding regimes, and handling procedures. The pros of these indicators is that they can be clearly defined and function as practical instructions to operators. The cons are that these are only an indirect measure of welfare and it is difficult to define thresholds that are correct across systems. Outcome indicators measure that good welfare has been achieved, for example injuries, swimming behaviour, and feeding patterns. The pros are that these are a direct measure of welfare and animal-based, so applicable across systems. The cons are that these can be difficult to define, in terms of evidence and consensus, and it can be difficult to trace back to the cause.

### Session III: Sustainability and Farm to Fork Strategy

#### - Animal Welfare

##### • Q&A

Q: With the exception of RSPCA, are there no other ecolabels that into account animal welfare?

A. by Doug Waley: Animal welfare-specific is only the RSPCA, but some of the GAA and GAP have some existing aspects of welfare in their schemes. The EU organic regulations also have some focus on animal welfare, such as slaughter, feeding and breeding regimes, and housing conditions.

Q: Can you comment on the costs that comes with the competence required to assess animal-based measurements?

A. by Doug Waley: You can never undervalue the training to interpret the animals they are keeping and looking after. I am not able to produce specific figures. Working with behaviour indicators, it should be relatively cheap, even though there is some laboratory work for validation. For a farmer or an auditor, it should be cheap.

Q: Of the three options presented (stand alone, integrated, or add-on), what would be your preference?

A. by Dr. Krzysztof Wojtas: It is a complex issue. There are pros and cons for each. Personally, it would be a full integration into the existing labels, particularly the larger ones. The brands have already been built and are recognised. To some extent, it is interrelated with sustainability. Some of these brands already running welfare programmes, but it will probably take time to implement and to see the quality. The separate welfare label has the advantage of being very robust, but the disadvantage of achieving enough recognition. Plus, the consumer can face a challenging position of having to choose between products with different labels.

Q: What is your experience at the global scale? In Europe, animal welfare is regarded important, at least with NGOs, but it does not seem to resonate elsewhere, not even in the USA?

A. by Doug Waley: A few years ago, I worked on workshop on the implementation of the RSCPA standard by fish farmers in China, Thailand, and Vietnam. There was a stakeholder discussion on the definition of ethical welfare in the local language. There was a huge overlap with the concept of husbandry. The related benefits for the farmers were well understood. Without happy fish, the fish die. Still, they did not have the same ethical expectations from European consumers.

Q: Could you comment on all the fish that just choke to death on the boats and how we can address that?

A. by Doug Waley: There is increasing research and advocacy activity in the area, but little best practices to example. Some best practice pioneers include Ekofish.



### **Session III: Sustainability and Farm to Fork Strategy**

#### **- Session Closure**

- **Benoît Thomassen, Chair of Working Group 3, MAC**

The workshop tried to cover most of the aspects connected to voluntary claims, certification schemes and ecolabels for seafood products. The thematic of voluntary claims and certification schemes is not new for the MAC. The first discussion among the MAC membership took place back in 2018 based on documents and studies provided by the European Commission. The MAC came to the conclusion that it was important to hold a workshop to provide balance expert input and to analyse the status quo of voluntary claims and certification schemes in the EU market, including their role in the supply chain and for consumers.

A workshop report will be prepared by the MAC Secretariat. This will serve as a basis for an advice to the European Commission with follow-ups and recommendations on the potential need to update the current legislative framework on voluntary sustainability claims on seafood products. The advice should be adopted in 2021.

## Panellists' Biographies

### - Session I: Introduction & Public and Private Initiatives

- **Introduction:**

**Benoit Thomassen** is a Belgian bio-engineer specializing in aquaculture. He first worked in a research project for the restocking of wild salmon in Wallonia (the South part of Belgium). He then worked as production and quality manager for a large Belgian producer of trouts. He then became the representative of Walloon fish farmers in the Collège des Producteurs (the Agricultural Producers Assembly). By this position, he is also a member of the Federation of European Aquaculture Producers (FEAP) and he chairs the Sturgeon commission which represents around 40% of the global caviar production. He created the World Caviar Forum in 2019, the first forum dedicated exclusively to caviar producers around the world and taking place during the Seafood Global Expo. Finally, he is the new Chair of MAC Working Group 3, on behalf of the FEAP.

**Simon Bush** holds the Chair of Environmental Policy at Wageningen University in the Netherlands. He has published on public and private environmental governance arrangements for fisheries and aquaculture over the last 15 years. He also advises seafood standards and ratings organizations in both the EU and US in a variety of roles. His recently published book, entitled 'Governing Sustainable Seafood', explores how market-based arrangements such as certification, FIPs, fishery credit systems and traceability can expand their impact by rethinking their social objectives in driving sustainability.

- **Public Initiatives:**

**Nianjun Shen** is the Senior Fishery Officer from the Fisheries and Aquaculture Department. He covers fish value chain and major seafood market access issues including traceability, certification and catch documentation schemes. He has 13 year direct working experiences with multilateral organizations including 6 years with FAO. Before that, he worked with Chinese Ministry of Commerce for 10 years on bilateral and multilateral trade agreements, market access for LDCs and development program management.



**Bjorn-Erik Lonn** concluded a Master of Science (zoophysiology, biology) from the University of Helsinki, in 1982. He is employed by Ecolabelling Norway and is working for the Nordic Swan Ecolabel since 1993 in Oslo, Norway. He was the Nordic Coordinator from December 1993 to August 2015 and Senior Adviser, International Affairs from August 2015 and on. In both positions reporting directly to the board of CEO's for Nordic Ecolabelling organisations. He is Director on the board of Global Ecolabelling Network, GEN, since 2006, and was elected GEN chair in October 2015. He represents GEN in ISO work with the ISO 14024-standard for Type 1- ecolabels since 2012; Convenor of ISO TC207/SC3 WG 7 since 2014 and on. He represents GEN in the UNEP 10 YFP consumer information (CI-SCP) programme both on the multistakeholder advisory committee (MAC) and many of the working groups since 2015.

- **Private initiatives:**

**Caitlin Peeing** is Senior Manager, Membership and Services, at ISEAL. She has fifteen years' experience in sustainable supply chains, with particular expertise in sustainability standards, participatory program design, and global stakeholder engagement.

**Hugo Byrnes** joined Ahold Delhaize's predecessor Ahold in 2006 and was subsequently appointed to the position of Vice President Product Integrity. He is responsible for Ahold Delhaize's food and non-food product policies, which cover product safety and responsible products. This includes social compliance, animal welfare and environmental issues. Hugo Byrnes has a Dutch Law degree from the State University Leiden, the Netherlands. He is a food lawyer whose career has focused on the food business and in particular on quality management and standardization. From 2000 to 2005 he was the Director of the Global Food Safety Initiative (GFSI). Next to being a Board member for GFSI, Hugo is co-chair of SSCI (Sustainable Supply Chain Initiative) and serves on the Steering Board of the Global Sustainable Seafood Initiative (GSSI).

**Karin Bilo** has recently joined WWF again as the manager global seafood certification standards. In this role she coordinates WWF's engagement in the MSC program, both in individual certifications as well as program review processes.

## **Session II: Seafood Value Chain, Environment & Market**

- **Experiences of the Value Chain:**

**Sofie Smedegaard Mathiesen** is a biologist and works broadly with sustainability of the members fisheries of the Danish Fishermen PO. One of her main tasks, however, is to manage her organisation's MSC certifications and be an active stakeholder to MSC to ensure that Danish fisheries still meet the standard and consider alternatives to MSC, if deemed necessary.

**Javier Ojeda** is general secretary in the Federation of European Aquaculture Producers (FEAP). He also holds the position of general manager in the Spanish Aquaculture Producers Association (APROMAR).

**Mike Mitchell** is an independent, UK based seafood consultant, with more than 40 years experience in the sector. Mike's consultancy business Fair Seas Limited offers advisory, representation and research services to a wide range of seafood businesses including major multiple retailers (such as Marks and Spencer), value added processors (such as Young's Seafood), food service providers and third party standard holders. Mike sits on the Board of Trustees of Fisheries Innovation Scotland (FIS) and has previously served on the Oversight Board of the Responsible Fishing Vessel Scheme (RFVS) and the Stakeholder Council of the Marine Stewardship Council (MSC). Mike is currently a board member of Seafish, a Non Departmental Public Body, and is President of the Shellfish Association of Great Britain.

**Ondina Afonso** has over 20 years work experience in academia and the agri-food sector. Currently she is Head of Quality & Research at SONAE MC - the market leader in food retail in Portugal. She also chairs the Producers Club of SONAE MC, via which the company strengthens the competitiveness, innovation and sustainability of national fresh production and producers. She's the Chair of the Food Committee at EuroCommerce.

- **Environmental Benefits & Impacts:**

**Dr. Eva Papaioannou** is a post-doctoral researcher in GEOMAR – Helmholtz Centre for Ocean Research Kiel, Germany. She has an academic background in marine sciences and geography, specializing in fisheries research and management. She has been involved in several interdisciplinary research projects in various geographic locations (Rutgers University, US; University of Dundee, UK; University of the Azores, Portugal). She is genuinely interested in



strategies for promoting the sustainable use of marine resources and environmentally friendly maritime activities, also for the long-term benefit of coastal fishing communities. She is currently engaged in the research project “Ecosystem-based fisheries management in the German EEZ” that aims to develop scientifically sound baselines for the implementation of key environmental and fisheries legislation in the Western Baltic. A key part of the project is reviewing to what extent eco-labeling schemes and novel fishers’ initiatives can promote the sustainability of fish resources, marine habitats and vulnerable species, benefiting fishers and their communities.

- **Market Benefits, Costs & Limitations:**

**Dr. José Luis Fernández Sánchez** is full professor in the Department of Business Administration at the University of Cantabria, teaching different subjects at the undergraduate and postgraduate level. He gets a doctoral degree from University of Cantabria, a master’s degree in Economics from the Queens College of the City University of New York (CUNY), as well as a master’s degree in Marketing and Commercial Management from ESIC Business & Marketing School. For 5 years (2014-2019), he has been the director of the master’s degree in Business Administration (MBA) at the University of Cantabria. As a researcher, he collaborates with the research group Economic Management for the Sustainable Development of the Primary Sector (IDES) at the University of Cantabria publishing numerous articles and book chapters in different international journals and publishers. He has participated in more of 30 national and international projects related to the economic management and sustainability of the fishing and aquaculture sectors as, for example, in the European H2020 projects SUCCESS and MedAID, which results have been presented in different international conferences. He has also participated as an independent expert in the Scientific, Technical and Economic Committee for Fisheries (STECF) of the European Commission and collaborated with regional and national institutions in Spain as the Spanish Ministry of Agriculture, Fishing and Food, or with international institutions as FAO.

### **Session III: Sustainability and Farm to Fork Strategy**

- **Consumer's Attitudes**

**Dr. Sterenn Lucas** has a PhD in environmental economics from the University of Nantes, France, on the determinants of green consumption applied to seafood products. Since January 2013 she has been a lecturer in Economics at Agrocampus Ouest (ACO). ACO is a centre for higher education and research in agriculture, food and environmental sciences, under the aegis of the French Ministry of Agriculture & Fisheries. ACO has a triple vocation: training students to a high scientific level (1900 students – Bsc and MSc in Research and Development and PhD), conducting academic and applied research based on the sustainable development of resources and territories (130 lecturers and researchers, 360 associate researchers), and transferring knowledge to the socio-economic sector. Within AGROCAMPUS OUEST, the Fisheries and Aquatic Sciences Centre (18 scientists, 10 PhD students) is the only one in France in charge of a polytechnical and multidisciplinary graduate and post-graduate programs in fisheries science & aquaculture (> 1 000 students graduated, since 1970). Her research focuses on environmental economics, consumer behaviour (survey data and scanned data), fisheries economics and the seafood market. Her work mainly focuses on consumer behaviour in regards of sustainable seafood consumption. She has been involved in various research projects such as PrimeFish (H2020-635761), BALANCE (National Agency for Research - Norwegian Aquaculture – in the span between domestic social responsibility and international market demands), SILAC (Regional program) and Idealg (National Agency for Research - to develop the Seaweed sector on the French territory).

- **Environmental Footprinting**

**Henrik Stenwig** is director of Environment & Veterinary affairs of the Norwegian Seafood Federation responsible for the food policy-work of the Norwegian Seafood Federation. He holds a degree of veterinary medicine Ph.D. from the Norwegian College of Veterinary Medicine, on the thesis "Moulds in animal feeds in Norway with special reference to toxigenic species". From May 2001, he was adviser food safety in the Norwegian Seafood Federation and from April 2002 to April 2007, managing director of the Norwegian Seafood Federation – Fishfeed and from May 2007 the current position in the Norwegian Seafood Federation. From August 1992 to May 2001, he was adviser and later (from February 1997) assistant director general in the Department of food policy in the Ministry of Agriculture, Norway working with food safety and animal health

issues including matters related to international agreements such as the EEA-agreement and the SPS-agreement (WTO). From July 1981 to March 1985, he was a scientist at the Section of bacteriology, serology and feed hygiene at the National Veterinary Institute, Norway, and from April 1985 to August 1992 Head of Division at the same section responsible for research and routine diagnostics within the disciplines of bacteriology, serology and mycology mainly related to terrestrial animals and feed hygiene, but also aquatic organisms. From January 1980 to March 1981, he was District Veterinary Officer.

- **Environmental & Social Sustainability Schemes (Panel Discussion)**

**Chris Davies** is a former U.K. politician who served from 1999 for more than three terms as a Member of the European Parliament, most recently until January 31 this year as chair of the fisheries committee. He was the founder of the cross-party 'Fish for the Future' group of MEPs that campaigned from 2010 to ensure that the reformed Common Fisheries Policy was based on the principle of sustainability. He is currently moderator of the 'Blue Deal Debates', a series of webinars that explores issues concerning fisheries and the marine environment.

**Monique Tran**, since January 2020, has been the Fisheries and Aquaculture Sector Delegate within the national establishment for agricultural and marine products, FranceAgriMer. In collaboration with state representatives and professionals, it ensures consultation and monitoring of the Fisheries and Aquaculture sector. Monique Tran is notably in charge of organising the work of the specialized council for the fishing and aquaculture sector and, more generally, ensuring the proper coordination between the establishment's actions and the problems of the sector. She previously held the post of director of the Agency for the Development of International Cooperation in the Fields of Agriculture, Food and Rural Areas (ADECIA). In charge of international projects and missions, she has acquired in-depth knowledge of the tools and mechanisms for funding institutional cooperation projects. Through the various positions previously held in the services of the Ministry of Agriculture and Food, she also has a good knowledge of agricultural institutions and policies in France and in Europe.

**Helen Duggan** joined Seafish in 2014 as the Head of Responsible Sourcing and has a background in purchasing and global supply chain management. Prior to joining Seafish Helen was a seafood buyer for one of the biggest value-adding manufacturers of seafood supplying the UK retail market. During her time at Seafish Helen has overseen the delivery of several Responsible Sourcing work programmes, including the Risk Assessment for Sourcing Seafood and the

Responsible Fishing Scheme. Helen is currently the Head of UK Regions (East), overseeing the work undertaken by the team in locations around the UK to provide the industry with the support it needs to thrive on a national and regional basis.

**Melanie Siggs** has extensive experience of working internationally across both commercial and NGO sectors addressing issues relating to food and timber, although she is best known for her work on fisheries and aquaculture in the past 10 years. She is a Director of the Global Aquaculture Alliance, Global Seafood Assurances and Advisor to the World Economic Forum's Friends of Ocean Action. She holds an MSc in Responsibility & Business Practice. Melanie is a former Special Adviser to HRH The Prince of Wales' International Sustainability Unit.

**Dr. Julio Móron Ayala** is Managing Director of OPAGAC/AGAC since 2007. Prior to become Director, he was the Scientific Advisor of OPAGAC/AGAC since 1997, and he attended the Scientific Committees and commission meetings of the four tuna RFMOs dealing with tropical tunas (IATTC, ICCAT, IOTC and WCPFC). From 1994 until 1997 he worked for the Spanish Oceanographic Institute detached in Seychelles at the Spanish Fisheries Office, depending of the Spanish Fisheries Administration. He was in charge of the monitoring of the Spanish tuna fleet in the Indian Ocean, including the ports of Victoria (Seychelles), Mombasa (Kenya) and Diego Suarez (Madagascar); and representing Spain at the negotiation of EU fisheries agreements with Madagascar, Comoros, Seychelles and Mauritius. From 1991 until 1994, he was working as FAO Associate Expert to the Indo-Pacific Tuna Development and Management Program (IPTP) in Colombo, Sri Lanka. There, he performed several studies of tuna biology in the Indian Ocean and South-East Asia; compilation of tuna catch statistics; designed and monitored tuna sampling programmes in Philippines, Malaysia, Thailand, Indonesia and Sri Lanka; and maintain the IPTP data base. Before that, while finishing his University, he worked as fisheries observer on board several fishing vessels. Now OPAGAC is grouping 9 tuna companies that own 47 purse seine vessels, employ more than 2,000 fishers and catch around 400.000t of tropical tunas (8% of Global Tuna Catch) in the 3 major Oceans of the World, under the management on IATTC, ICCAT, IOTC and WCPFC where he and his team are regular participants.



**Camiel Derichs** is Program Development Director (PDD) for the Marine Stewardship Council (MSC) appointed since April 1st, 2019. Before that, he has been leading the development of the MSC program across Europe as Regional Director Europe from 2013 till 2019. Since 2005, Camiel served in a variety of other roles in the MSC. Setting up several regional offices in Netherlands, Sweden and working both with the technical development of the fisheries standards, as well as with actors in the supply chain on topics such as CSR and sustainable seafood procurement policies, as well as sustainable seafood marketing. Before joining MSC, Camiel was working in the Multi- National Financial conglomerate, ING-Group as a product manager. He holds a BSc and MSc from Erasmus University Rotterdam (Netherlands) in Business Administration, and a MSc from Tromso University (Norway) in International Fisheries Management.

- **Animal Welfare:**

**Douglas Waley** is the Fish Welfare Programme Leader at Eurogroup for Animals, an umbrella organisation for 70 animal advocacy organisations based in Brussels and operating primarily as a political lobby group. He works with policy makers in the European Commission, European Council and European Parliament to maximise the impact of existing legislation and to pursue new legislation. Prior to this role he had a stakeholder engagement role in large scale research projects on the sustainability of aquaculture in Asia and its exports to Europe.

**Dr. Krzysztof Wojtas** is Head of Fish Policy at Compassion in World Farming International. He is currently leading a European wide project aimed at improving the welfare of fish. He has been working as an Assistant Professor at the Wroclaw University of Environmental and Life Sciences. He has conducted various research and published scientific papers on animal welfare with a special focus on fish cognition and welfare. Previously he was working as a consultant for Eurogroup for Animals; a Brussels based organisation lobbying in the European Commission and Parliament for Animal Welfare.