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UNITED NATIONS UNCTAD | The Commonwealth | IOI International Ocean Institute

Oceans economy and trade:
Sustainable fisheries, transport and tourism

The State of Sustainability Initiatives Review: Standards and the Blue Economy

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International Institute for Sustainable Development

Outline

SSI presentation

- What is the State of Sustainability Initiatives (SSI)?
- Seafood Market findings
- Standards Systems findings
- Conclusions
- Policy recommendations

Question and answer period

SSI State of Sustainability Initiatives

What is the SSI?

Providing framework for understanding…

- Market trends
- Systems characteristics

IISD
International Institute for Sustainable Development

SSI State of Sustainability Initiatives

SSI Review 2014

Market trends and systems characteristics of 16 voluntary sustainability standards operating across ten commodity sectors

http://www.iisd.org/ssi/

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SSI Seafood Review

Market trends and systems characteristics of 9 key voluntary sustainability standards operating in the wild catch and aquaculture sectors

Aquaculture Stewardship Council

FRIEND OF THE SEA ©

global aquaculture the alliance

ICELAND RESPONSIBLE FISHERIES CERTIFIED

GLOBALG.A.P. The Global Partnership for Safe and Sustainable Agriculture

China Good Agricultural Practice Certification GAP+

IFOAM

Marine Stewardship Council

Naturland

Data collection

Initiative	Data Issue	Data Importance	Data Solution	Sources of discrepancy
Organic (aquaculture)	Incomplete species data	Necessary to observe trends in the adoption of organic certification	Data presented as is, with volumes for specific species available for certain countries, but not all. Although incomplete, the available data helps give an indication of the primary species certified in Organic aquaculture. Species-level data from Naturland, which is a complete set, also helps give an idea of what aquaculture species are being certified Organic more generally.	Incomplete dataset
Friend of the Sea	Aquaculture production not broken down by country	Necessary to provide an accurate picture of the global distribution of production, which is needed to observe where VSS are having potential impact	Estimated by dividing the 2014 total certified production volumes for each species by the per species and per country number of aquaculture certificate holders, as retrieved from the FOS website. Relative to reported species volumes from the FOS website and public presentations, the dataset provided by FOS left approximately 190,000 tonnes of aquaculture from several species that needed to be accounted for (e.g., sea bass, gilthead, and seabream). To estimate the remaining production per species per country, the resulting volume was divided by the total number of producers per country for all remaining species.	The per-country attribution assumes proportional productivity across aquaculture certificate holders in all countries and for all certified species.
Friend of the Sea and MSC	Wild catch landings sometimes	Necessary to provide an accurate picture of volume	For species landed in the same country but from multiple fishing zones, the total landings	Assumes an even distribution of landings along the

Review findings

1. Production
2. Growth
3. Production by species
4. Production by region
5. Supply
6. CARE

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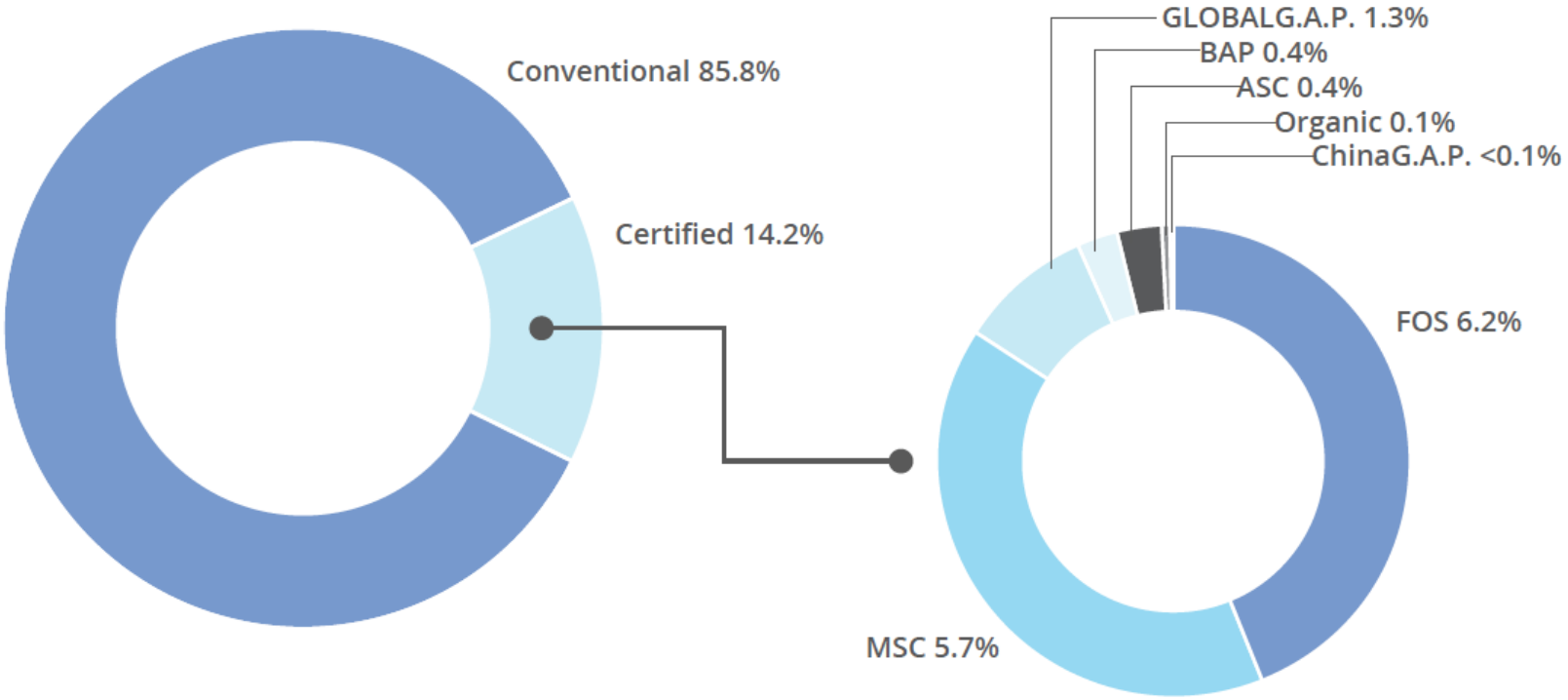
Mainstream Market Presence

Production of Certified Seafood has Grown Rapidly over the Past Decade and Now Represents a Significant Portion of Global Production



Certified vs. conventional seafood production, 2015

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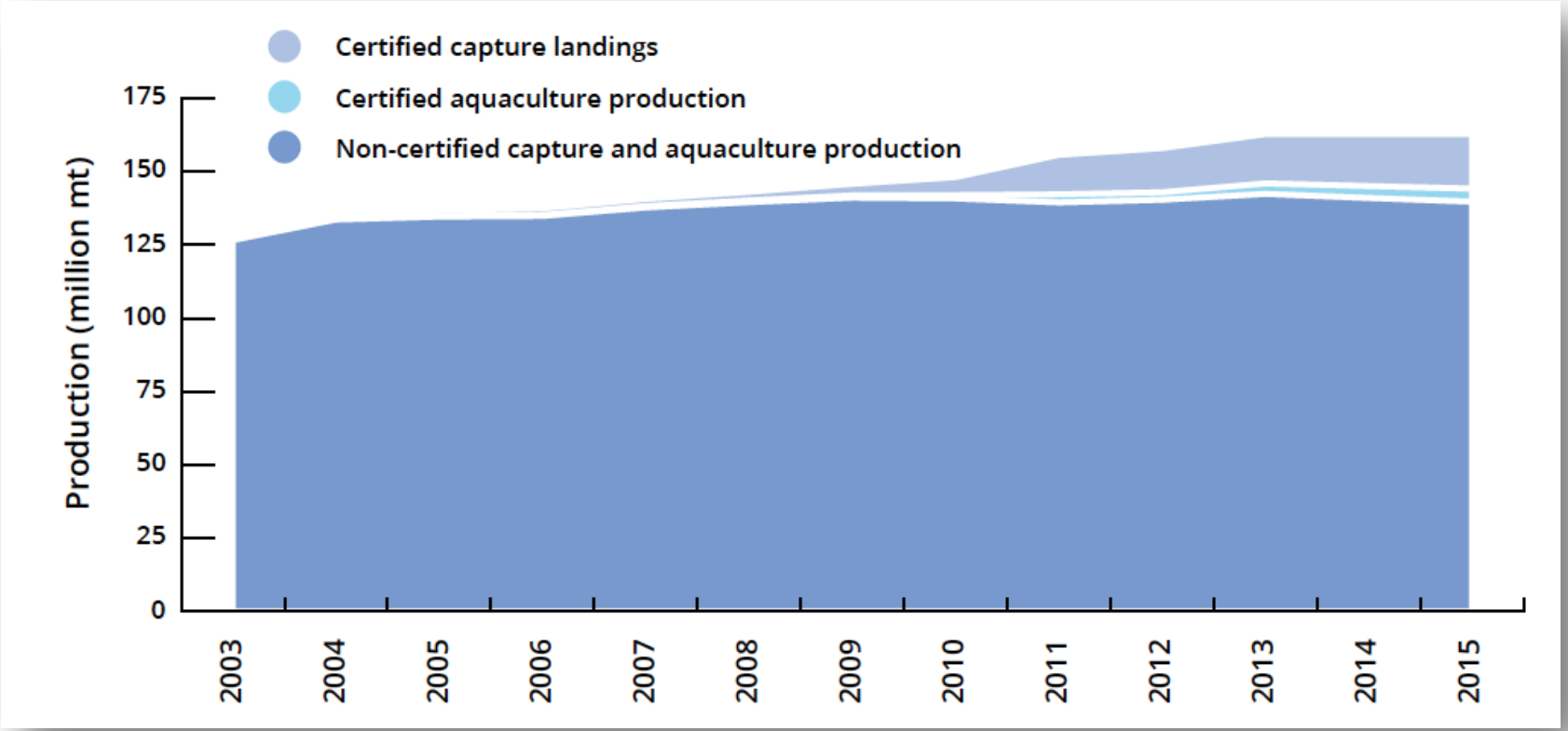
Rapid Growth

- Certified wild catch = 79 percent of total certified seafood production
- Certified aquaculture growing faster



Certified and non-certified wild catch landings and aquaculture production, 2003-2015

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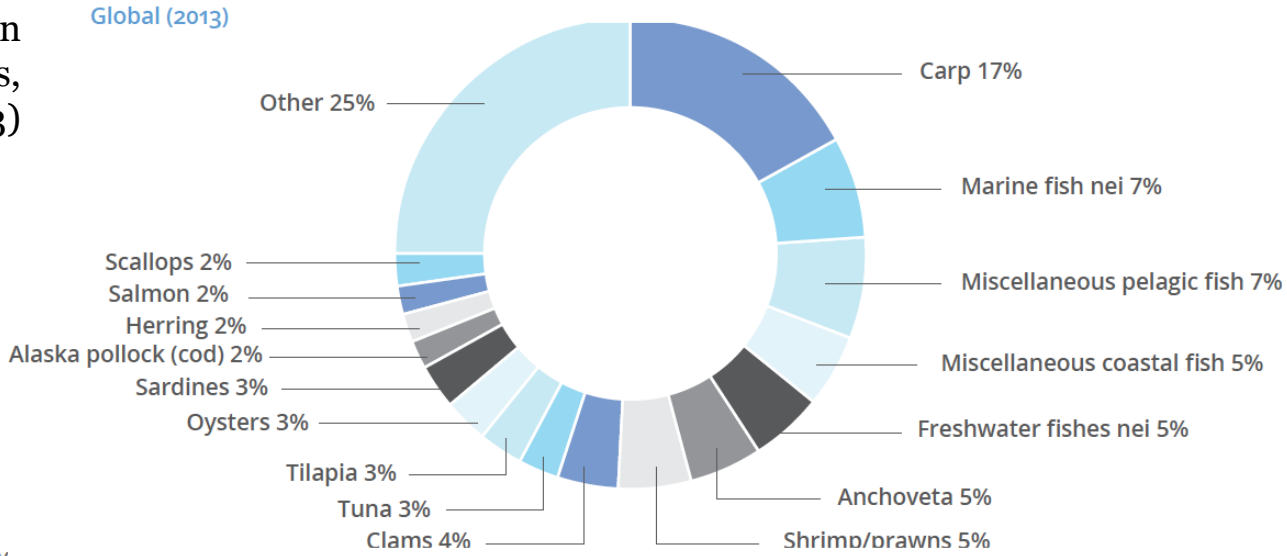
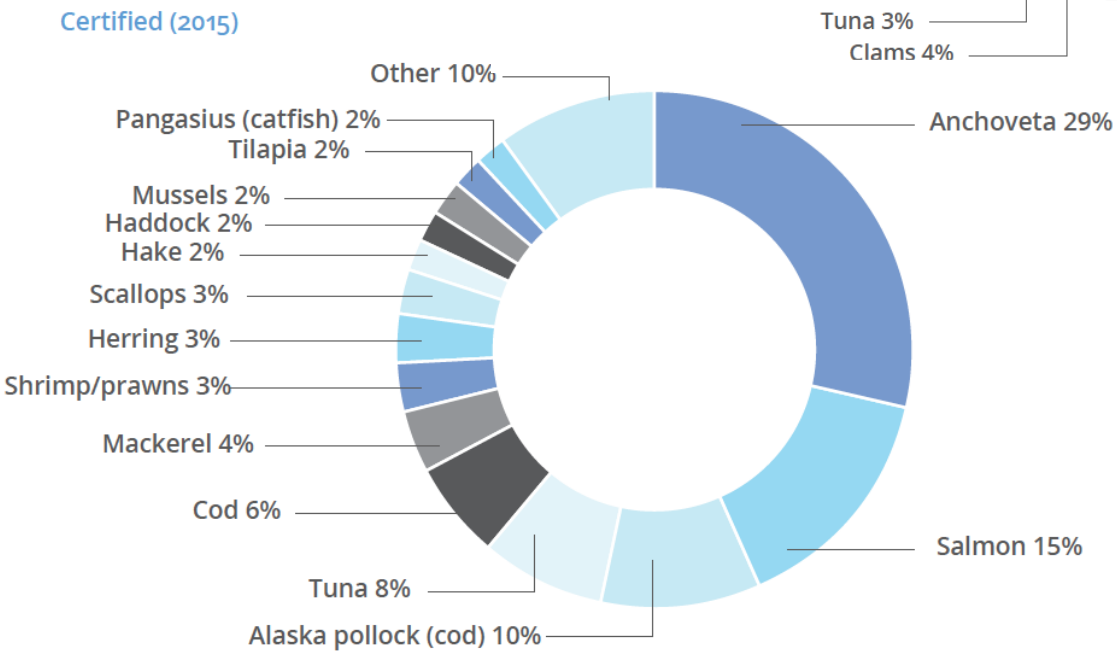
Production by species

Percentage of total production by seafood key species groups, certified (2015), global (2013)





5 species groups account for 69% of certified seafood production

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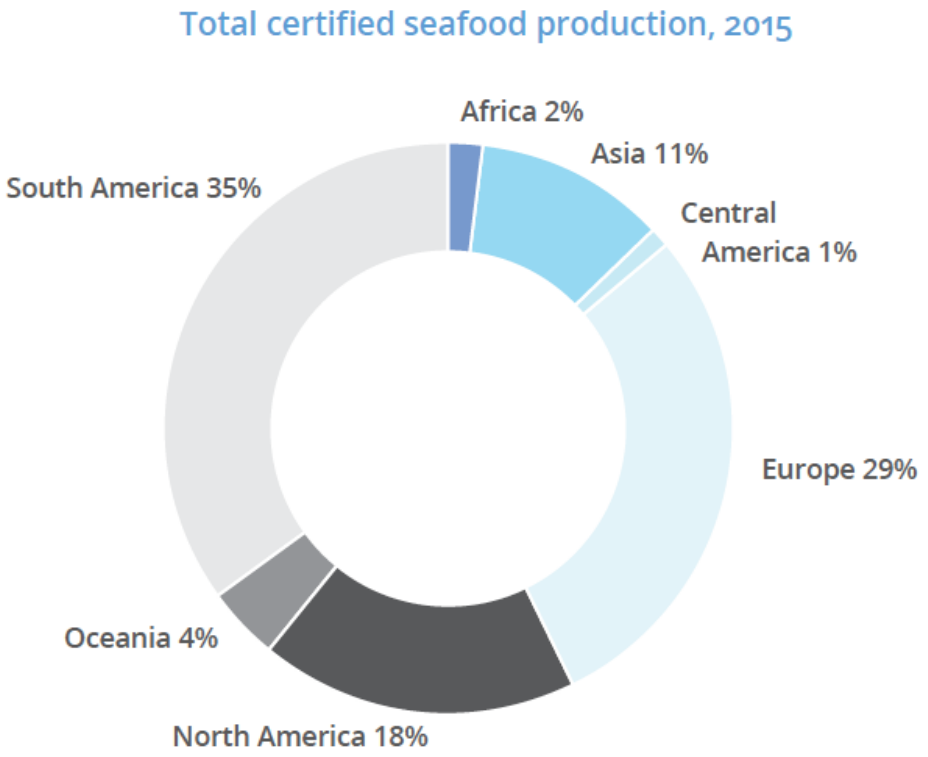
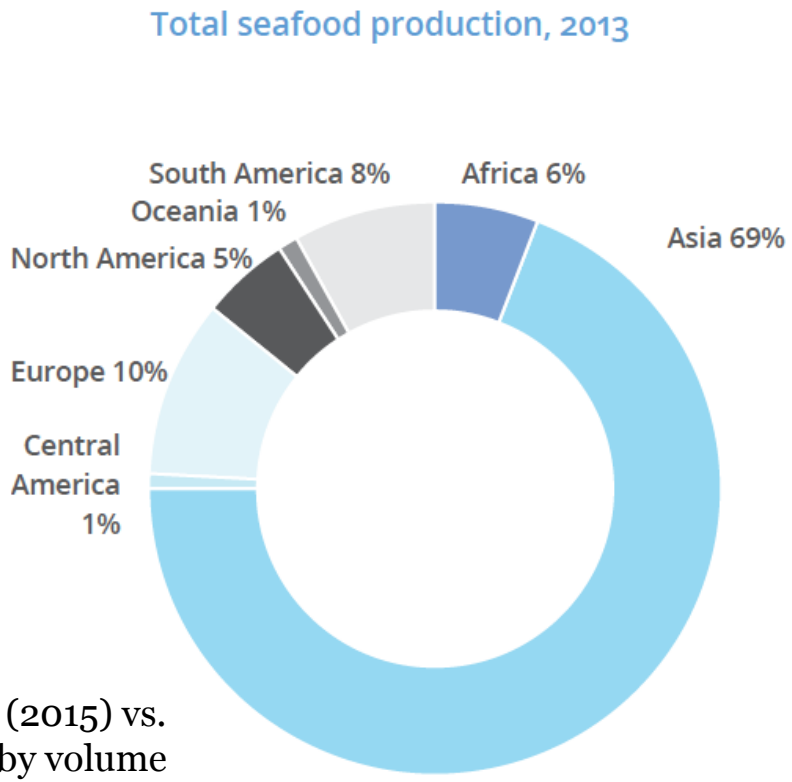
Production by region





Global Distribution of Certified Seafood Production (2015) vs. Conventional Seafood Production (2013), by volume

Five countries account for 65 percent of certified seafood production

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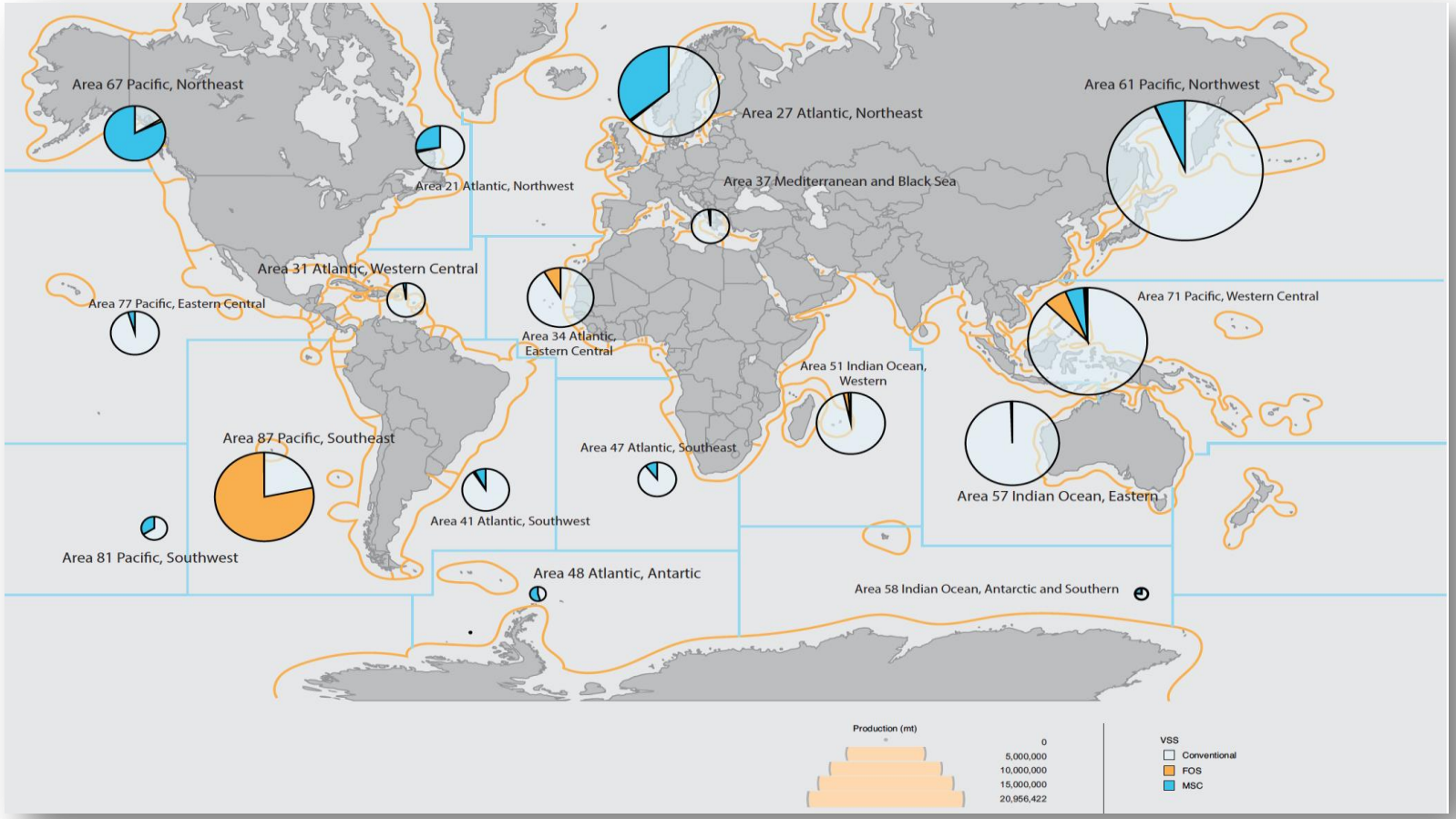
Supply

Supply constraints will limit growth in certified wild catch absent major capacity improvements



Certified wild catch as a proportion of total wild catch, by fishing zone (2015)

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The Economy of CARE

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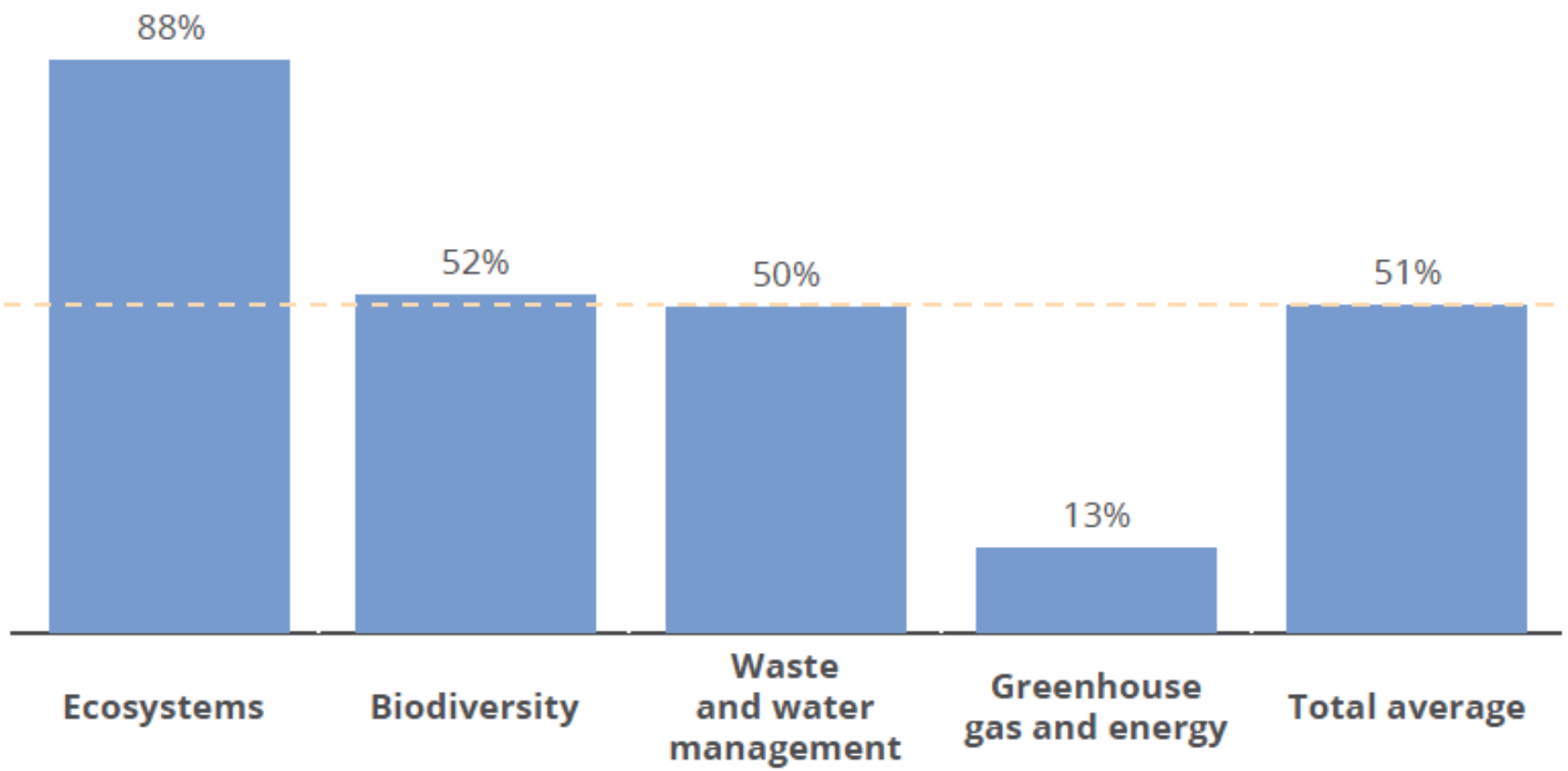
Coverage: Environmental-wild catch



Wild catch standards by environmental theme

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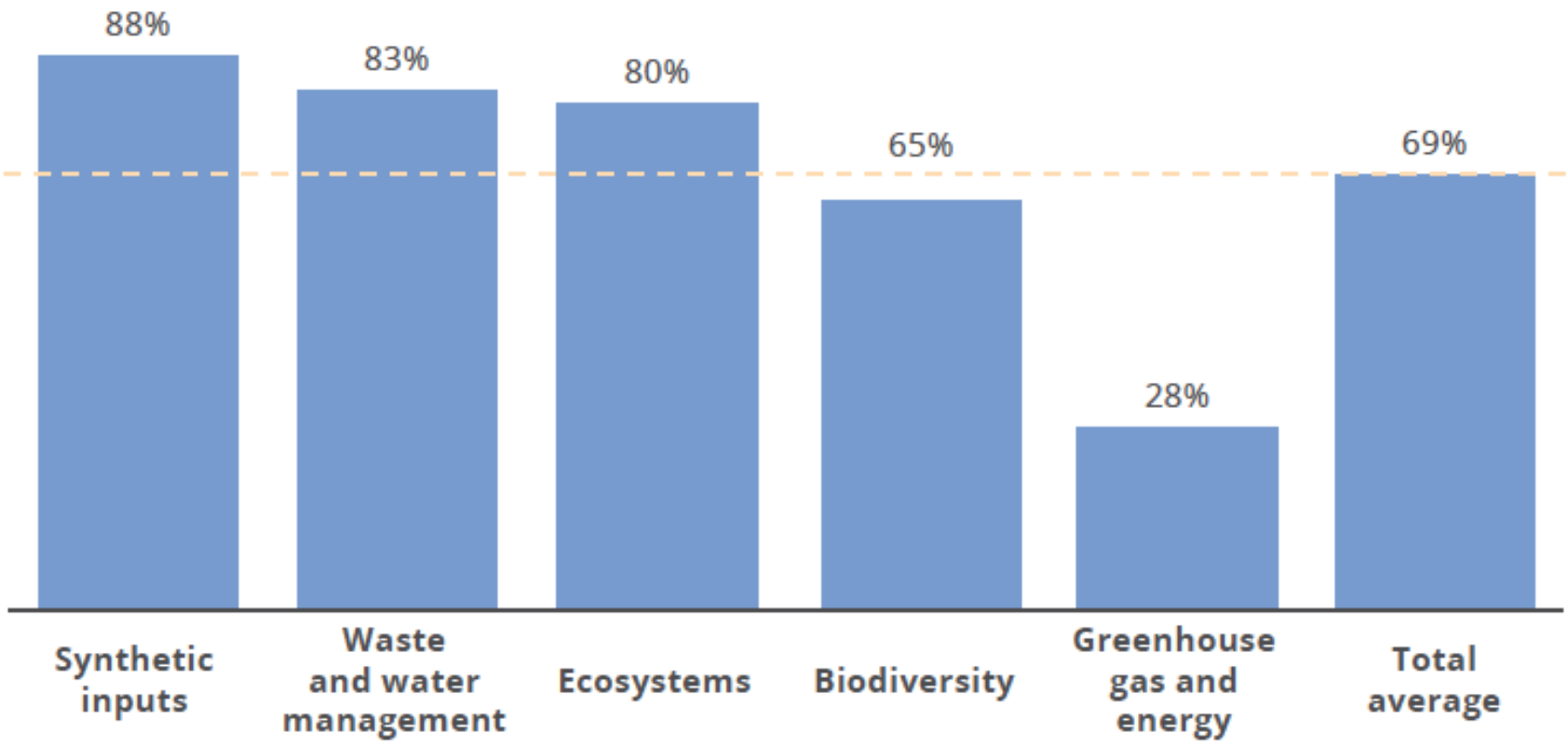
Coverage: Environmental-aquaculture



Aquaculture standards by environmental theme

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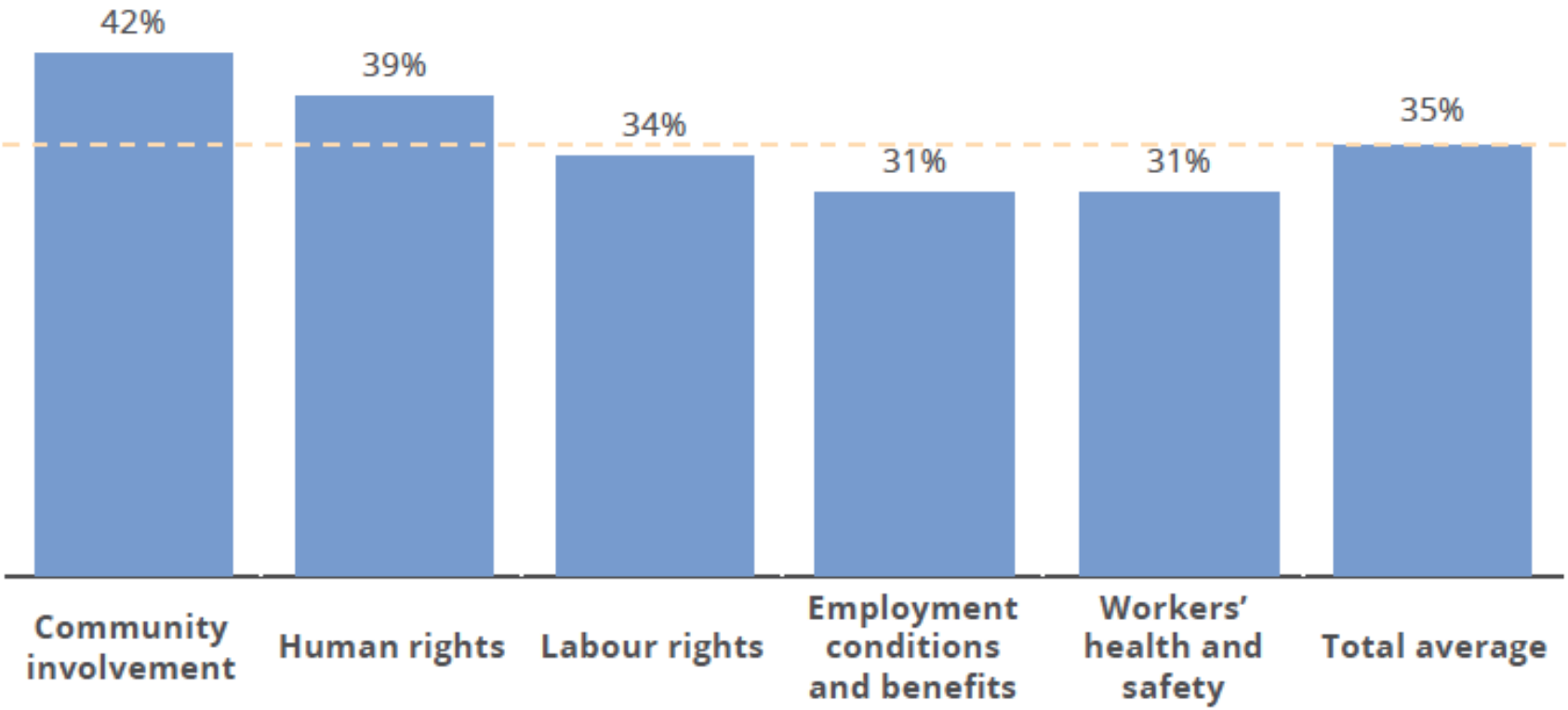
Coverage: Social-wild catch



Wild catch standards by social theme

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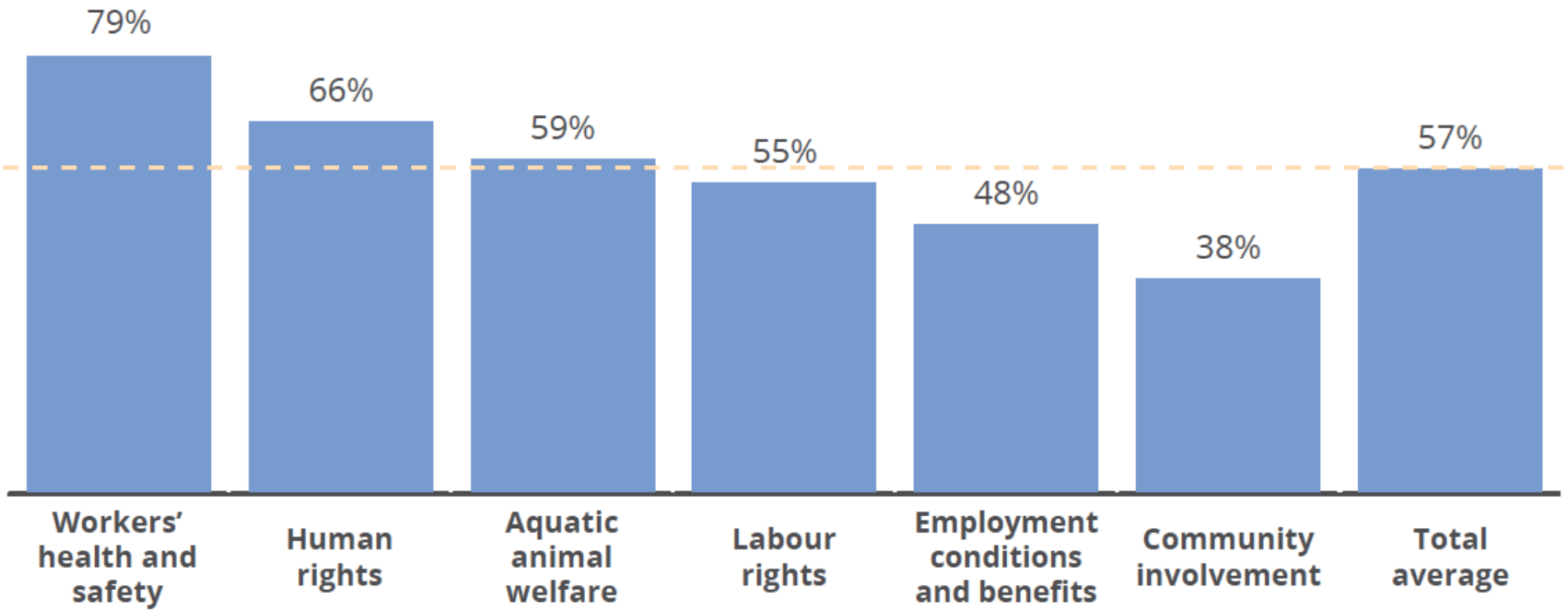
Coverage: Social-aquaculture



Aquaculture standards by social theme

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Assurance

Standard	Separate CoC standard[134]	Chain of Custody model			
		Identity preservation	Segregation	Mass balance	Book & claim
ASC*	✓	✓	✓		
ChinaG.A.P.			✓		
FOS		✓	✓	✓	✓
GAA BAP**		✓	✓	✓	
GLOBALG.A.P.	✓	✓	✓	✓	
IRF	✓	✓	✓		
IFOAM		✓	✓		
MSC	✓	✓	✓		
Naturland		✓	✓	✓	✓

* The newest version of the MSC CoC requirements version 2.0 integrates the ASC CoC requirements (see MSC, 2015b). ChinaG.A.P. information provided by ITC, 2015.
** BAP uses mass balance model of traceability for feed components only.
Naturland uses mass balance and book and claim for feed, harvest estimation and larvae.

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Responsiveness

Standard	Regional standards and localized indicator development	Local auditors engaged in the certification process	Separate standard for smallholders	Group certification
ASC*				
ChinaG.A.P.**	✓	✓		✓
FOS				✓
GAA BAP				✓
GLOBALG.A.P.	✓	✓		✓
IFOAM	✓	✓		✓
MSC***		✓		✓
Naturland				✓

**Some local certification bodies used by ChinaG.A.P.: WIT Assessment (China); China Quality Mark Certification Group Co. Ltd.; Beijing Coops Integrity Certification Centre; CQC—China Quality Certification Centre; SGS-SCTC Standards Technical Services Shanghai, China). Co. Ltd. (see GLOBALG.A.P., n.d.-a). The principle of subsidiarity index is not applicable to Iceland Responsible Fisheries as it only operates within Iceland. At the time of writing ASC was in the process of developing group certification processes for its standards.
***The MSC includes competency requirements for at least one assessment team member to have current knowledge of the country, language and local fishery context.

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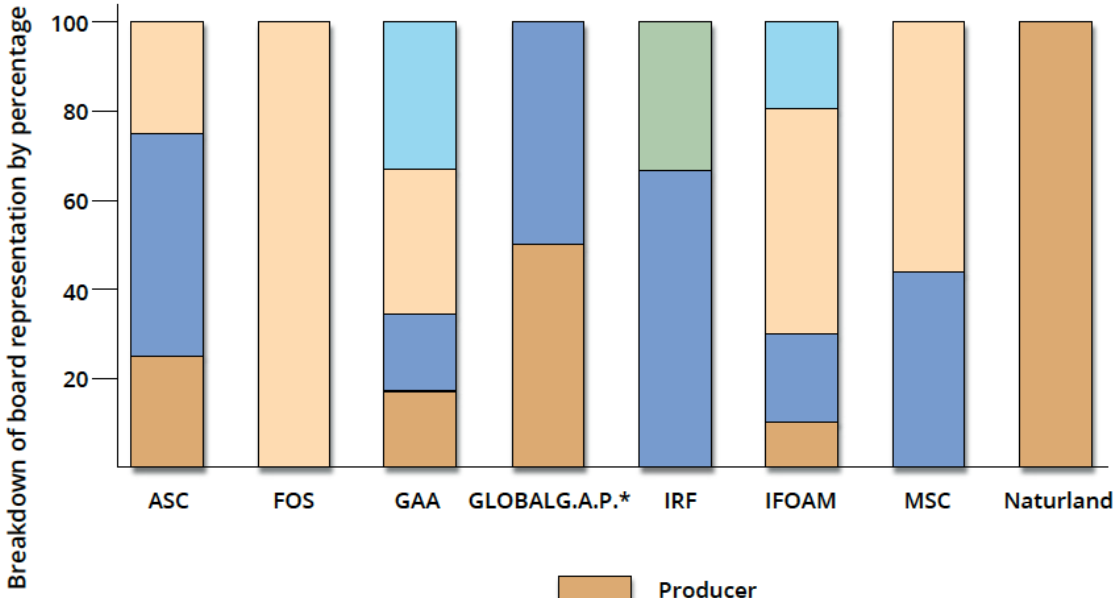
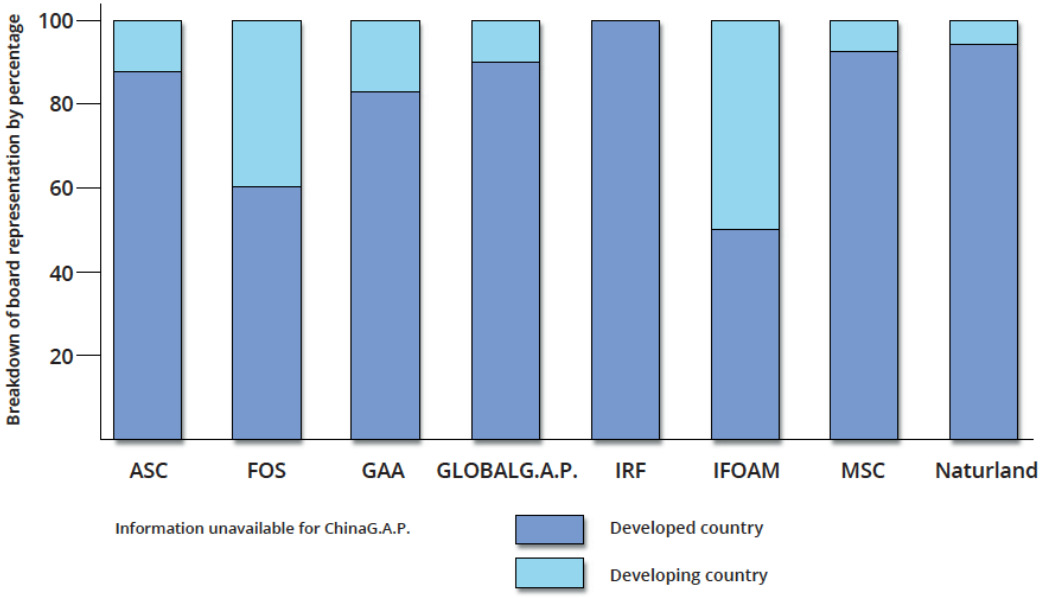
Engagement

Board representation by stakeholder group



Board representation by level of development



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Conclusions

- Conceptually aligned with promotion of Blue Economy
- Market forces may limit ability to stimulate change in poorer regions
- Limited market growth and underdeveloped infrastructure contribute to lack of expansion of sustainable seafood production
- Investment required to enable broad inclusiveness within sustainable supply chains
- International restrictions on IUU fishing one of most compelling policy drivers for investment in short term
- Seafood standards offer tool to measure, verify and “lock in” sustainable and legal practices

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Policy recommendations

1. Working with national governments, development and multilateral agencies: should provide significant and targeted technical assistance to facilitate certification of developing country producers especially smaller producers. Donor countries should consider formation of global fund for sustainable fisheries
2. Certification schemes: should proactively invest in building more equitable representation of developing countries across their governance systems
3. National governments, under World Customs Organization: should establish HST codes for certified seafood products
4. The international community, perhaps led by the FAO: should clearly identify minimum requirements for social sustainability within seafood sector
5. National Governments: should establish minimum transparency, conformity assessment and notification requirements on voluntary systems operating within their borders in accordance with TBT Code of Good Practice and in a manner to ensure equal access to such systems
6. National Governments: should consider implementation of preferential fiscal policies for certified seafood products where Standards have demonstrated full compliance with FAO Guidelines

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Thank you

State of Sustainability Initiatives