



Responsible Marine Ingredients for Aquaculture

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GOAL Santiago
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IFFO

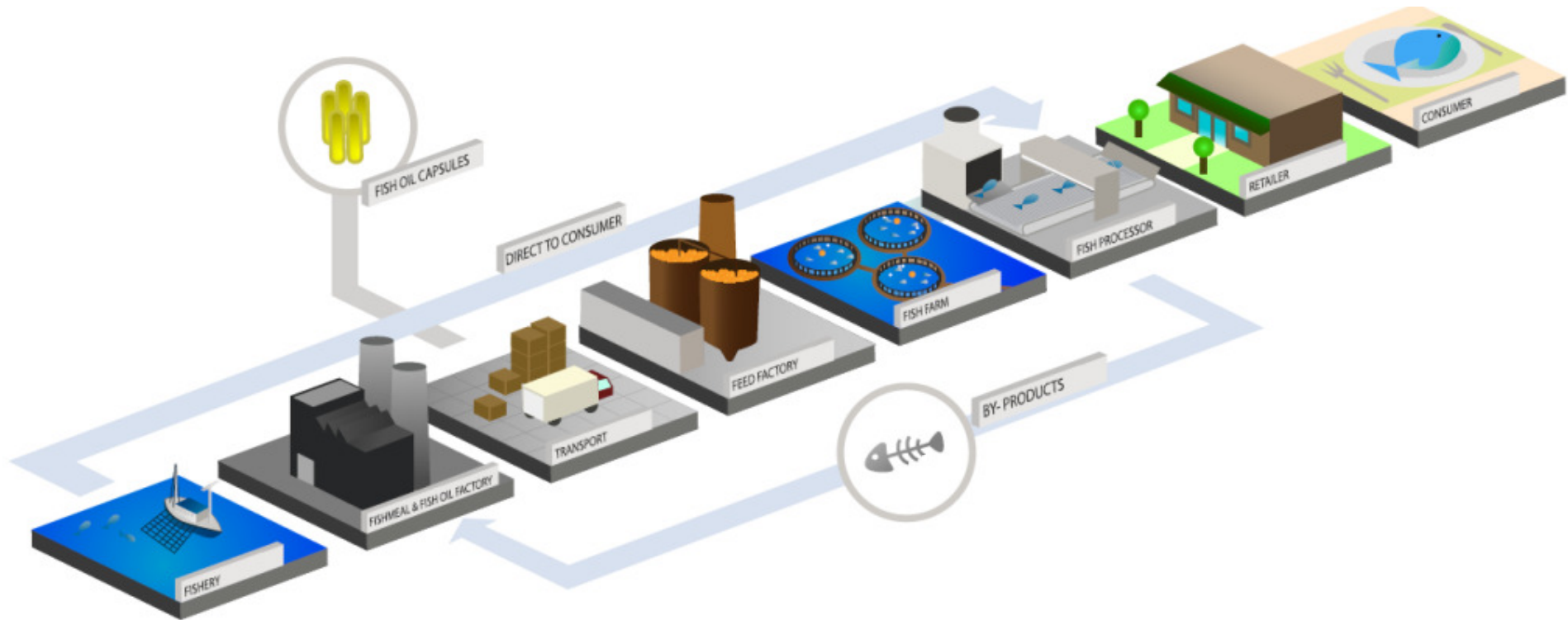
International Fishmeal and Fish Oil Organisation is the global trade association representing fishmeal and fish oil producers and related trades.

Represents 60% of world production and 80% of trade in fishmeal and fish oil worldwide with producers in Europe, South America, Africa, USA, China and India.





The Value Chain



There is value chain concern over two critical areas



The need to demonstrate that any whole fish processed come from well managed fisheries and that there are no illegal, unreported or unregulated (IUU) fish included. Also that any fisheries by-products do not come from endangered or IUU fish



The need to demonstrate that production in the factory ensures pure and safe products. Also that the supply-chain then maintains the purity and identity of the products with a chain of custody demonstrating traceability





IFFO developed its Global Standard for Responsible Supply (IFFO RS)

RS is a B-to-B initiative following the ISO-65 Standard

Standard developed by multi-stakeholder committee including producers, traders, feed companies, fish farmers, major retailers, standard setters & NGOs

A 3rd party Certification Body was appointed to conduct audits into each application

Currently undergoing ISO 65 Accreditation to ensure compliance with ISO-65





To comply with the Global Standard for Responsible Supply (RS) a factory must:

Source its whole-fish raw material from fisheries managed according to the FAO Code of Conduct for Responsible Fisheries (MSC certification is accepted as proof of this)

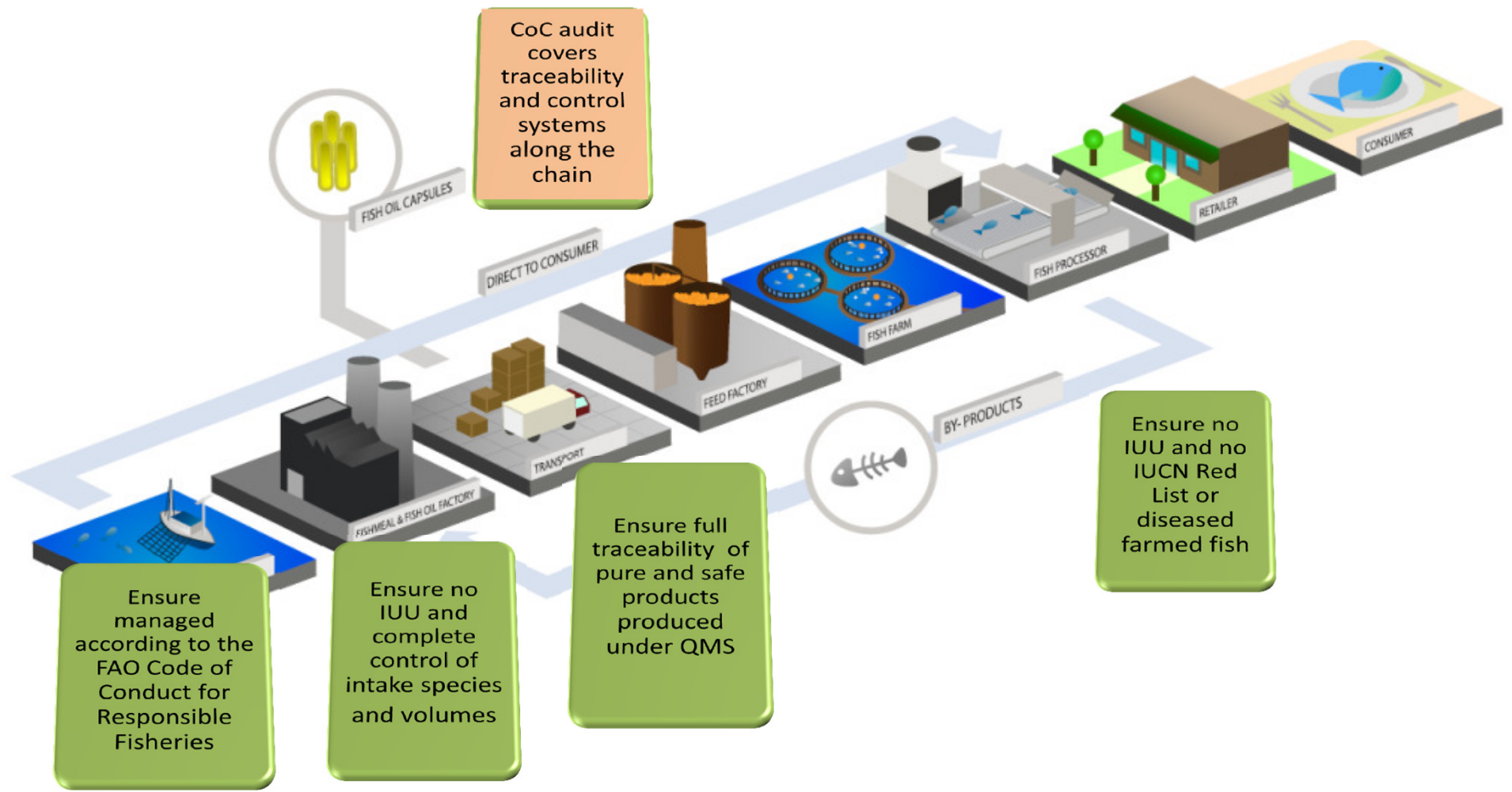
Avoid the use of Illegal, Unreported & Unregulated fish (IUU)

Not source fisheries by-products from IUCN red listed fisheries or from IUU fish

Manufacture under a recognised quality control scheme to ensure product safety, purity & traceability



IFFO RS Standard audits





IFFO-RS progress to date

Launched
to
members
in October
2009

First factory
was
awarded
certification
in February
2010

Country	Fishery	N° of companies	N° of certified factories	N° of factories pending certification
Peru	Peruvian anchovy (<i>Engraulis ringens</i>)	10	53	7
USA	Gulf menhaden (<i>Brevoortia patronus</i>)	3	3	0
	Blue whiting (<i>Micromesistius poutassou</i>)			
	Atlanto spring spawning herring (<i>Clupea harengus</i>)			
Iceland	Capelin (<i>Mallotus villosus</i>)	7	9	2
	Summer spawning herring (<i>Clupea harengus</i>)			
	6 Species of By-products			
	Norway pout (<i>Trisopterus esmarkii</i>)			
Denmark	Sand eel (<i>Ammodytes marinus</i>)	2	3	0
	2 Species of By-products			
UK/Ireland	19 Species of By-products	1	3	0
Norway	1 species of By-product	1	2	0
	Total	24	73	9



IFFO-RS progress to date

This represents over 25% of world production of fishmeal and fish oil

There are more factories with their fisheries & by-products in assessment including in new countries

New Chain of Custody Standard has had first approval more in assessment

The programme is currently undergoing Accreditation to ISO 65



MSC & IFFO RS are different things

IFFO RS is a B-to-B certification program that enables a factory to demonstrate that it responsibly sources its raw material from well managed fisheries and responsibly converts that into pure and safe products.



The MSC's fishery certification program and seafood eco-label recognise and reward sustainable fishing.



IFFO RS recognises the MSC as a good way to demonstrate well managed fisheries



Future supply prospects of RS approved material

Currently 27% of world fishmeal and 38% of world fish oil have been approved

At the start of 2012 we hope to have over 30% FM and 40% of fish oil

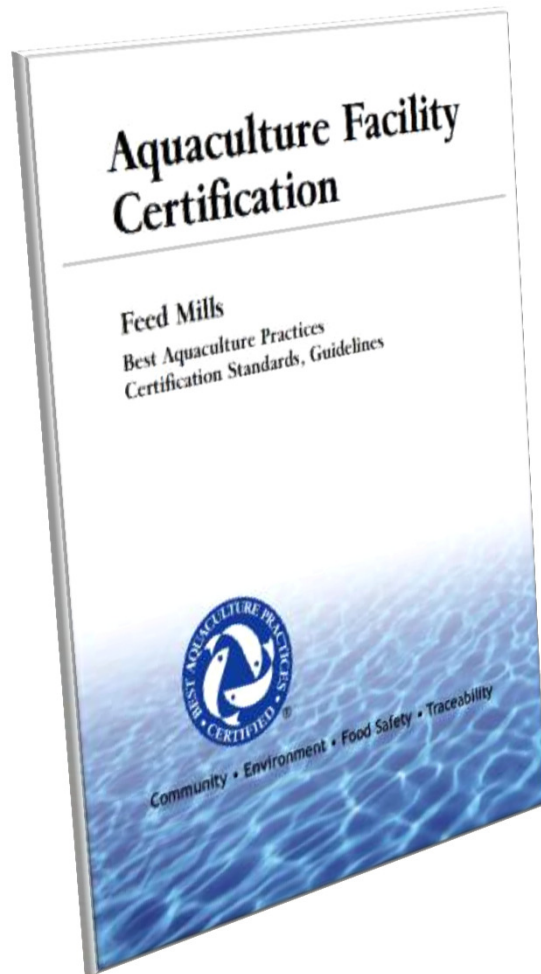
By 2013 we hope to have 40% of fishmeal and 50% of fish oil approved – but it is getting harder

In Americas and Europe production well covered – Asia is a problem





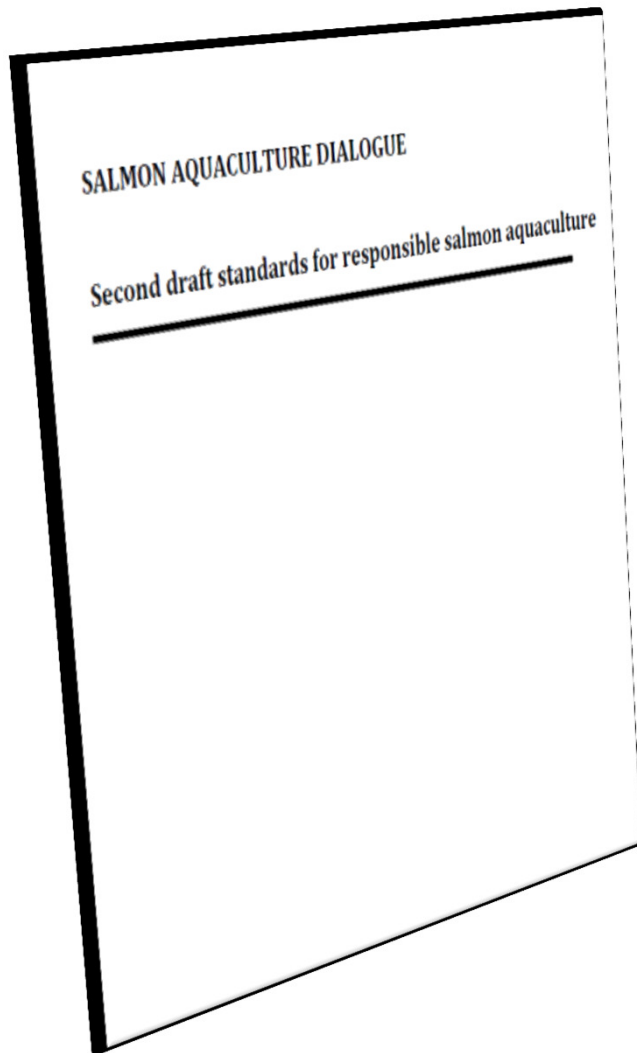
Acceptance by GAA BAP standard



After June 1, 2015, 50% of all fishmeal and fish oil from reduction fisheries shall be certified as compliant with approved standards. The preferred approved standard is the Marine Stewardship Council Environmental Standard for Sustainable Fishing (ISEAL compliant), provided it is combined with the MSC chain of custody compliance for the producing factory. The secondary approved standard is the Global Standard for Responsible Supply of the International Fishmeal and Fish Oil Organization (ISO 65 compliant), which includes the fishery as well as traceability, and good manufacturing practice for the producing factory.



Inclusion in draft ASC standards



Auditing guidance

The International Fishmeal and Fish Oil Organization's Global Standard for Responsible Supply is one option for demonstrating compliance with standards related to traceability of fishmeal and fish oil, as well as the exclusion of by-products from IUU catch and vulnerable, endangered, and critically endangered fisheries.



Improvers' Programme under development

There are a lot of factories which cannot achieve the RS standard – particularly in Asia

Often the reason is the lack of fisheries management data

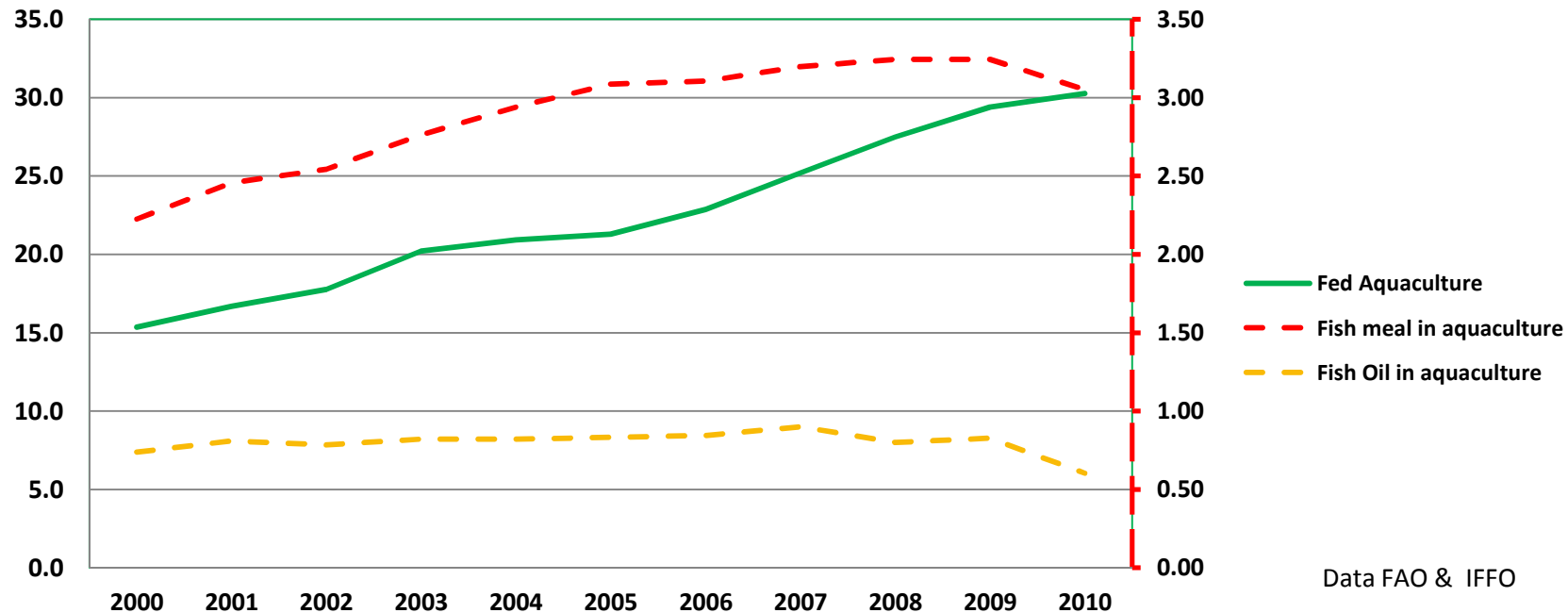
We wish to encourage fisheries and factory improvement

We are working with the help of others, particularly SFP and FAO to produce an IFFO Improvers' Programme



Can Aquaculture double in 10 years on available marine ingredients?

Global aquaculture production with fishmeal and fish oil usage
2000-2010 - tonnes millions

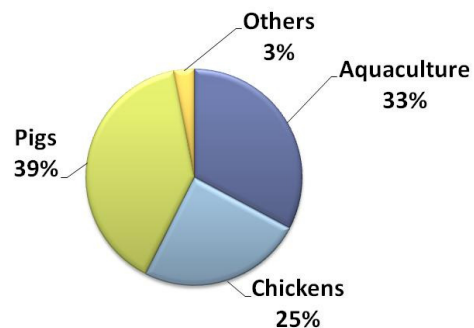


Over last decade fed aquaculture has grown 97% - marine ingredient usage 23%

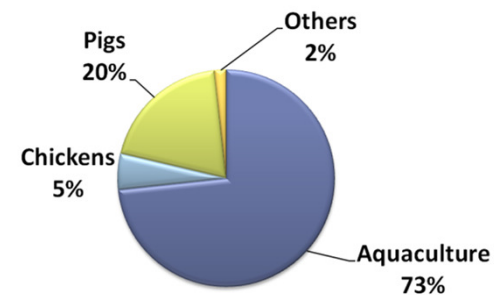


Aquaculture can also continue to take from Agriculture

2000 World Fishmeal usage



2010 World Fishmeal usage



Aquaculture can double in the next ten years by reducing marine ingredient inclusion while increasing feed production



Conclusions

There is a growing need to be able to demonstrate responsible buying of marine ingredients

IFFO RS is becoming accepted as the method of demonstrating responsible sourcing

Significant volumes are already available – with more to come

Asia requires a special approach – IP underway

Aquaculture can double production again with growing nutritional knowledge



Thank You!

Visit www.iffo.net to view our new
video on IFFO RS

