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Acknowledgements:

With thanks to Greenpeace Oceans campaigners and all our volunteers who deliver our sustainable seafood project, and all those individuals, environmental groups and progressive retailers, seafood producers and suppliers who are stepping up to the mark to fight for the future of our seafood and all ocean life.

October 2010

JN 345

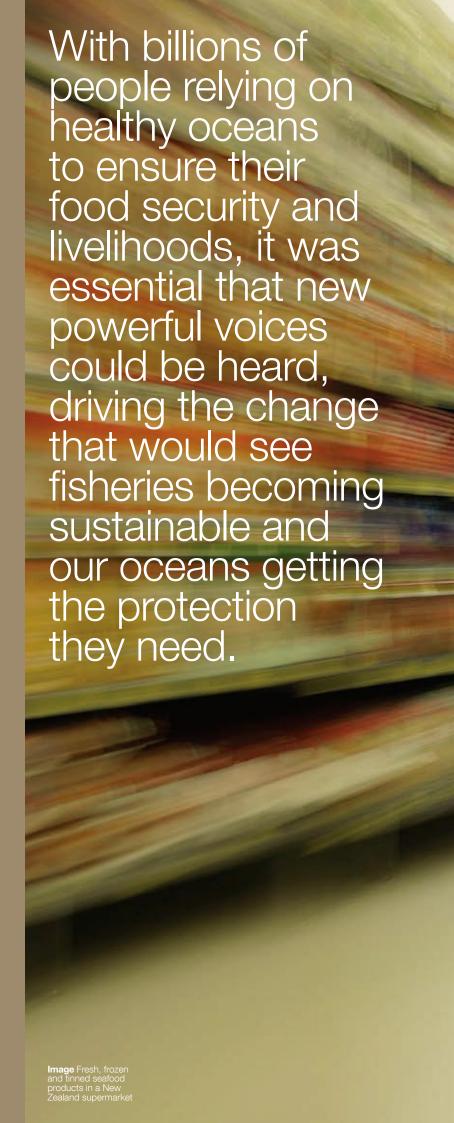
Published by

Greenpeace International

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greenpeace.org







Introduction

Following a seminal study by top marine scientists in 20012, which reported that global seafood catches had been declining since the 1980s, the news about the state of the world's fish stocks became progressively worse.

In 2004 the British journalist Charles Clover published his book The End of the Line, detailing the impacts of destructive and wasteful fishing around the world. By this point it should have been more than clear to politicians that the crisis in the world's oceans could no longer be ignored. Yet the decisions they made were persistently based on the short-term profit interests of influential fishing industries.

With billions of people relying on healthy oceans to ensure their food security and livelihoods, it was essential that new powerful voices could be heard, driving the change that would see fisheries becoming sustainable and our oceans getting the protection they need. To make this all happen a new approach was necessary - starting at the customer-facing end of the seafood chain: the retailers.

At this time, the UK retail market for seafood was already worth £1.8 billion (\$2.8 billion US dollars or €2.2 billion) a year and growing. Customers were buying almost 90% of their fish through a handful of major supermarket chains, rather than local seafood markets or fishmongers. Given the seriousness of the threats posed by unsustainable fishing to our marine environment, what were UK retailers doing to ensure that they could continue selling seafood? After a long period of research in stores, on supermarket websites and through meetings with retailers, Greenpeace UK presented its findings³ in October 2005. Retailers, keen to ensure continuous seafood supplies in the future, to keep their customers and to protect their reputations, began to change. And some changed fast.

Now, five years later in October 2010, retailers globally are part of a sustainable seafood revolution that is spreading around the world. They have become advocates for better oceans management. And the movement hasn't just stopped with the retailers - environmental organisations have boosted the movement, providing expertise on fisheries and aquaculture issues and working together with a wider range of market players including wholesalers, processors and restaurants. The increasing demand for sustainable products has already prompted seafood producers, traders and distributors to change. Now, it is time to see politicians follow this lead by supporting strong legislation to secure sustainable and well-managed fisheries worldwide.

> "Consumers, processing and retail sectors increasingly share these concerns and require guarantees that the fish they consume and sell originates from well-managed and sustainable fisheries."

Extracts from Green Paper, Reform of the Common Fisheries Policy, Brussels, April 2009 4

A recipe for global change

After its success in the UK, Greenpeace began to roll out its sustainable seafood project internationally. Today it operates in 20 countries at some level – UK, Austria, the Netherlands, Germany, Sweden, Norway, Denmark, the US, Canada, Spain, Portugal, New Zealand, Poland,

France, the Czech Republic, Belgium, Italy, Australia and Greece - and it has also started to roll out in Asia. Greenpeace Japan joined the campaign and published its seafood red list in July this year, and other offices in the region look set to follow.









What are sustainable seafood policies?

A good sustainable seafood procurement policy should contain a detailed definition of 'sustainable' for both wild-caught and farmed seafood. It should list the principles of how sustainable seafood is identified and purchased, and outline how this information is communicated to the public. A particular seafood product is sustainable if it comes from a fishery whose practices can be maintained indefinitely without reducing the target species' ability to maintain its population and without adversely impacting any other species within the marine ecosystem.

A sustainable seafood policy, when properly implemented, results in the removal of the worst seafood choices - starting with redlisted species – from the shelves. It supports and promotes the best choices, while driving change in the rest. It also allows customers to make an informed choice with good labelling and information about the origin and sustainability of all seafood products sold in stores. For an example of a sustainable seafood policy, visit:

www.greenpeace.org/international/seafood/changing-yourbusiness/model-policy



What are seafood red lists?

Anglerfish or monkfish or goosefish

American angler

Lophius americanus

Angler

Lophius piscatorius

Black-bellied angler Lophius budegassa



Tuna

Bigeye

Thunnus obesus

Northern bluefin

Thunnus thynnus

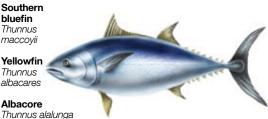
Pacific bigeye Thunnus orientalis

Thunnus albacares

bluefin Thunnus

maccoyii

Albacore Thunnus alalunga



Eel

European eel

Anguilla anguilla

Japanese eel Anguilla japonica

American eel Anguilla rostrata



Haddock

Melanogrammus aeglefinus



Greenland halibut

Reinhardtius hippoglossoides



Hoki or blue hake or blue grenadier

Macruronus



Redfish or rockfish

Ocean perch Sebastes marinus

Deepwater redfish

Sebastes mentella

Acadian redfish Sebastes fasciatus



Orange roughy or deep sea perch

Hoplostethus atlanticus



Skates and rays

Common or blue skate

Dipturus batis

Atlantoraja castelnaui

Spotback ray

Dipturus laevis

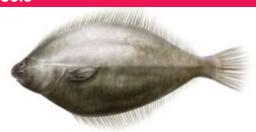
Maltese ray Barndoor skate Leucoraja melitensis

White skate Rostroraja alba



Common sole

Solea solea



Seafood red lists list species commonly sold in supermarkets that have a high risk of being sourced unsustainably. The Greenpeace 'International Seafood Red List' lists 20 groups of fish species at very high risk of being sourced from unsustainable fisheries ('red-graded') and explains the

rationale for red-listing them. Greenpeace is urging companies to stop sourcing these key species as a first step in moving towards sustainable seafood purchasing policies. For more information, visit: www.greenpeace.org/international/seafood/red-list-of-species

Atlantic cod



Sharks

Including:

Schoolshark / soupfin shark Galeorhinus galeus

Shortfin mako Isurus oxyrinchus Blue shark Prionace glauca

Squalus acanthias



Hake

European hake Merluccius merluccius

Southern hake Merluccius australis

Argentine hake Merluccius hubbsi Shallow-water Cape hake Merluccius capensis

Deepwater Cape hake Merluccius paradoxus

Atlantic halibut

Hippoglossus hippoglossus



Marlin

Striped marlin Tetrapturus audax

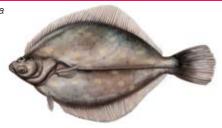
Atlantic white marlin Tetrapturus albidus

Atlantic blue marlin Makaira nigricans Black marlin Makaira indica



European plaice

Pleuronectes platessa



Atlantic salmon

Salmo salar



Tropical shrimp / prawn

Including:

Chinese white shrimp Penaeus chinensis

Speckled shrimp Metapenaeus monoceros

Pacific white shrimp Litopenaeus vanname

Indian white shrimp Fenneropenaeus indicus

Black tiger shrimp, giant tiger shrimp Penaeus monodon



Swordfish

Xiphias gladius



Toothfish

Patagonian toothfish or Chilean sea bass Dissostichus eleginoides

Antarctic toothfish

Dissostichus mawsoni



04

Customers can make an informed choice

One of the first visible changes that customers notice as supermarkets begin to improve their seafood sourcing policies is better labelling of seafood products. Previously, even the better-informed customers with knowledge of fisheries and aquaculture issues were still unable to identify sustainable seafood choices. They were greeted by a wide variety of fish names – some of which bore no relation to the actual species names at all. Some retailers did not distinguish between farmed or wild-caught fish, and very rarely was information provided about where and how the fish was caught. Furthermore, labelling would seldom go beyond the often very basic requirements of national labelling laws.

Retailers have now started to provide greater detail about their products – on packaging, on labels at fish counters or as additional information provided by better-trained fish-counter staff. Alaska pollock, Scottish haddock, and Pacific cod are no longer labelled simply as 'white fish'. 'Tuna' is now recognised as a variety of species that includes skipjack, yellowfin, or albacore. 'Cod' is described as line-caught Icelandic or Pacific cod or even trawled New Zealand hoki. And 'salmon' is identified as wild Pacific salmon from Alaska or farmed Atlantic salmon from Scotland. In addition to better labelling, retailers and seafood brands like Young's and Birds Eye often provide more information on their seafood products on their websites.

The overall increase in the transparency of seafood sourcing means customers can now make much more informed choices about the seafood they buy.



Loblaw – Gone fishing for sustainable sources!

When Loblaw – Canada's largest food distributor and retail chain – developed its sustainable sourcing policy, it wanted its customers to understand exactly what this meant. At selected stores across Canada, customers started noticing empty trays at the seafood counters. These were spaces where fish – such as orange roughy, toothfish, shark and skate – were once displayed; Loblaw had identified these fish as being 'at risk' and had removed them from sale. The company aimed to create a visual message to help educate its customers about sustainable seafood choices. Once a viable sustainable product can be found the trays will be refilled.

"Waitrose has 217 stores in total, of which 209 have fish counters. And while we have a 4% share of the retail market overall, by offering a sustainable source of fish we have 10% market share for fresh fish. Responsibly sourced fish is slightly more expensive, but not much more. Do you think it is better to pay a little bit more for fish today, or to pay a lot more later on?"

Jeremy Ryland Langley, Specialist Seafood Buyer, Waitrose, June 2009 6



Unsustainable species disappear from shelves

When retailers announce their development of a seafood sourcing policy, it is often accompanied by a notice that two or three red-listed species, or groups of species, have been removed from sale or are being phased out. Some of the most common species being removed from supermarkets globally are sharks, bluefin tuna, skates and rays. In the US and Canada, orange roughy and both Patagonian and Antarctic toothfish (sold as Chilean seabass) have widely been taken off the supermarket shelves, while in Austrian supermarkets yellowfin tuna has all but disappeared.

"Whole Foods Market is in the process of expanding and further developing our Quality Standards for seafood. As a part of this process, we re-evaluated orange roughy. Based on the species' life history and unsustainable catch levels, it's clear that this species is very vulnerable to depletion. Rather than Whole Foods Market contributing to the decline of orange roughy, we've chosen to discontinue selling it and to promote other alternatives."

Carrie Brownstein, Seafood Quality Standards Coordinator. Whole Foods Market, 2008⁷

Orange roughy

Orange roughy are deep-water, slow-growing fish. They mature at about 20 years old, and live for as long as 120 years, which makes them extremely vulnerable to overfishing. Around the world, populations of orange roughy have been serially depleted. In addition to overfishing, the heavy bottom trawls used to catch these fish destroy the unique and vulnerable deep-sea habitats found on seamounts.

Retailers who have publicly committed not to sell orange roughy are:

- Marks & Spencer (UK)
- Waitrose (UK)
- ☐ Sainsbury's (UK)
- ☐ Carrefour (France)
- □ Casino (France)
- Ahold (USA)
- The Great Atlantic and Pacific Tea Company (A&P) (USA)
- ☐ Trader Joe's (USA)
- Whole Foods Market (USA)
- Wegmans (USA)
- ☐ Compass Group (USA)
- Costco (USA)
- ABS Seafood (USA)
- Overwaitea (Canada)
- □ Loblaw (Canada)
- □ Sobeys (Canada)
- Metro (Canada)
- Martin Bosley (Restaurateur, New Zealand)





06

Making and supporting better choices

Retailers and producers with progressive seafood sourcing policies work closely with their suppliers to shift their procurement to more sustainable fisheries. Sainsbury's in the UK, for example, chose to focus its efforts on improving the sustainability of its top five best-selling species – cod, haddock, salmon, tuna and prawns. In 2007, Sainsbury's became the first UK retailer to source 100% line-caught cod and haddock from healthy stocks. Waitrose committed to phasing out the most destructive fishing methods, and now no longer sells any fish caught by deep-sea bottom trawling, such as orange roughy. The retailer also stopped sourcing flatfish, such as plaice and Dover sole, from beam trawlers, a particularly destructive type of bottom trawling. All Waitrose's flatfish are now caught using a less destructive method known as Danish seining.

"Finding and developing supply sources of tuna that can feed us, while protecting the natural and social environment is one of the greatest challenges that we face in our generation."

Henk Brus, CEO, Sustunable 10

"What I want to be able to do is to say, here are a group of fishermen and a group of fish processors, and potentially marketers, who are actually using industry best practice, and it has been third-party audited and here's the tick that says that."

Peter Bodeker, Chief Executive, New Zealand Seafood Industry Council (SeaFic), October 2010 11

Canned tuna

In the UK, and subsequently in Austria, Italy, Australia, the Netherlands and other countries, Greenpeace has taken retailers to task over their canned tuna. High among the concerns are overfished species, fishing methods that catch and kill lots of unwanted species, and poor labelling. Of particular concern has been the increasing use of fish aggregating devices (FADs) by purse seiners, especially those targeting skipjack tuna, the most common species found in canned tuna. When using this method, fishermen close their nets around a wide range of marine animals, including overfished juvenile bigeye and yellowfin tuna, and endangered sharks and turtles.

In the UK in particular, responsible retailers have been quick to improve their canned tuna sourcing. Sainsbury's led the UK canned tuna brand ranking by being the first to commit to switching to 100% pole-and-line caught skipjack tuna, and were soon followed by Marks & Spencer, and Waitrose. The Co-op has managed to switch 60% of its range to pole-and-line caught skipjack tuna and other retailers have also increased the amount of pole-and-line caught skipjack they source, possible at least in part because of the pioneering work by retailers in securing reliable supplies. The UK now consumes the majority of the world's pole-and-line caught skipjack from the Maldives.



Image Fishermen use the pole-and-line fishing method to catch skipjack tuna. Pole-and-line fishing is a selective and therefore more sustainable way to catch tuna as only fish of a certain size are caught, leaving juveniles to grow to spawning age and replenish the stock in the future.







Changing the industry: Pole-and-line tuna demand

The increasing demand for sustainable tuna has encouraged Pacific Island Countries to consider developing their own pole-and-line skipjack fisheries rather than selling off the rights to their rich tuna resources to other countries for a fraction of the value of the tuna. These fisheries could provide employment in the fishery as well as in boat building and maintenance, and in landing and processing

As part of a Greenpeace initiative, European retailers and producers are encouraging this development by 'pre-ordering' over 70 million cans of pole-and-line caught skipjack. In addition, progressive producers and brands such as Organico/Fish4Ever¹², Sustunable¹³ and Fishes¹⁴ are working with Greenpeace and other NGOs to promote sustainable tuna and explore ways to support the development of sustainable fisheries.

07

Markets driving change to the political halls

By developing and/or supporting various initiatives, progressive retailers and seafood producers have taken steps to improve fisheries and aquaculture practices. In addition, some have also seen the value in protecting their reputations and future continuity of their supplies by directly contacting politicians about their concerns. The increasing demand for sustainable seafood and the increase in press coverage of fishery issues has certainly been felt in the political halls.

Joe Borg, then EU Fisheries Commissioner, in a note to his colleagues on the reform of Europe's Common Fisheries Policy (CFP) in September 2008 stated: "Reduced fish stocks have also led to a diminishing contribution of raw materials from Community fisheries to the European consumer [...] What is worse, major retail chains now maintain that the fact that fish have been harvested under the CFP does not provide their customers with sufficient guarantees of sustainability."

Stavros Dimas, the former EU environment commissioner, gave similar recognition to the work of retailers in his opening speech to the Retail Forum in Brussels, on 3 March 2009: "Another example [of change] is the commitment made by some retailers to only sell fish that has been sustainably caught. If the retail sector can help generate and focus a demand for sustainable fish, then a great deal could be achieved. [...] When species are confirmed to be heading for extinction I can personally see no reason why they should still be sold by responsible retailers. I expect that this is a question that the Forum will address."

Over on the other side of the world, when John Key, New Zealand's Prime Minister, addressed New Zealand Federated Farmers Association, on 18 November 2009, he warned: "From McDonalds to the UK supermarket chain Waitrose, the big companies that sell our products are demanding better standards for the products they stock. So regardless of your view about the environment or climate change, the opinions of your consumers will ultimately decide how well your products sell. This is what my Minister of Trade calls 'the customer as the new regulator...'"

In some countries, the industry has moved significantly ahead of politics over the last few years when it comes to seafood sustainability. However, the question still remains as to whether the sustainable seafood movement is really addressing the current crisis facing our marine life. Are the changes on supermarket shelves reflected by sufficient changes out on the water? Are they occurring at a sufficient speed to reverse the global trends of declining fish stocks and marine ecosystems in time to restore our oceans to health?



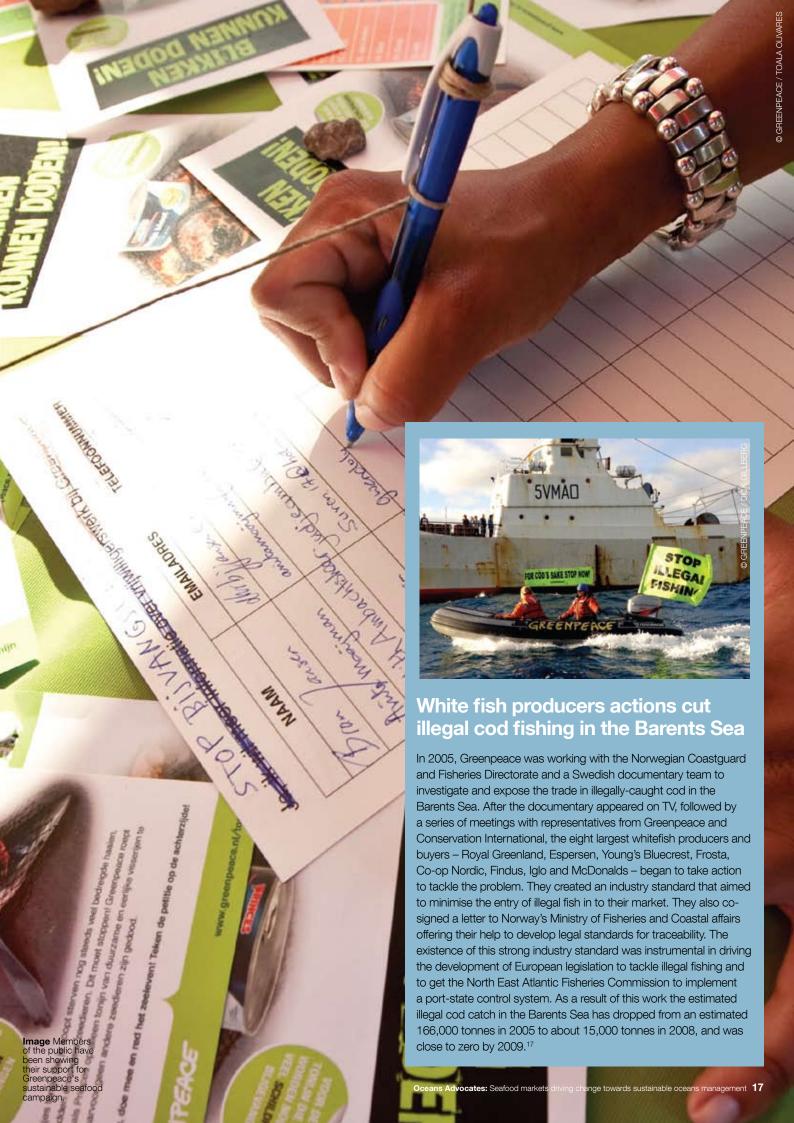
UK retailers and Icelandic cod

In July 2007, Iceland announced drastic cuts to its quotas for cod. UK retailers, Iceland's largest group of customers, had worked hard to shift their cod sourcing to Icelandic cod, a better-managed stock than most others in Europe at that time. They did not want their new product to lose its good reputation so they made sure Iceland knew their concerns. Iceland's Minister of Fisheries, Einar Gudfinnsson, acknowledged the role of UK retailers in this decision: "Those who buy the most Icelandic fish find it very important to be able to prove to their customers that they are offering fish from a stock which is sustainable and harnessed responsibly." ¹⁵

Ultimately to achieve this goal, national and regional fisheries management organisations must move quickly from their current state of failure towards truly encompassing a precautionary ecosystem-based approach to fisheries management. They will need to ensure that 40% of our oceans are protected as marine reserves – large areas of ocean off limits to fishing and other extractive or polluting activities.

"Fleets must improve their economic resilience and adapt to changes in the environment and markets, Some initiatives have been undertaken to improve quality, consumer information and the match between supply and demand in order to increase economic viability."

Extracts from Green Paper, Reform of the Common Fisheries Policy, Brussels, April 2009 16



Market players must continue to drive change by:

- actively engaging in fisheries improvement and sustainable fisheries development projects. This may include helping to fund initiatives that enable existing fisheries to move to sustainable fishing methods or the establishment of new, locally owned, sustainable fisheries as well as supporting on-the-ground research.
- **speaking with a common voice** in support of sustainable oceans management. Uniting under the name of their national associations, or even global associations, will underline the urgency of making change and can carry substantial weight on the political level.

Fair competition among retailers, traders and the production sector requires a level playing field in terms of standardised requirements for production and marketing processes. It is the role of the legislator to design and enforce such common standards and hence ensure fair competition. While several decision-makers have referred to the importance of the sustainable seafood movement, the establishment of a level playing field based on best practices for the fishing, seafood and retail industry is still a long way from being delivered.

Political decision-makers must assume responsibility for the future of our oceans now, and:

- ensure that 40% of our oceans are protected as marine reserves - large areas of ocean off-limits to fishing and other extractive or polluting activities - and that fisheries management is based on a precautionary ecosystem-based approach.
- reward those companies whose cutting-edge sustainability initiatives go beyond existing legislative requirements, by strengthening the rules that govern the fisheries sector and by developing measures to ensure the sustainability of the products allowed into seafood markets.
- begin to seek input from, and listen to, the wider range of stakeholders with interests in the protection of our oceans. Too much weight is currently given to the views of the industrial production and trading sector. The views and concerns of consumers, retailers, restaurateurs, fish processors, developing coastal states and small-scale fishermen are under-represented and often ignored in legislative and other political decision-making processes of relevance to the management of fishing practices and recovery of fish stocks.18
- listen to the scientists who provide fisheries and marine conservation advice to national governments and regional fisheries management organisations.
- develop programmes to educate consumers on the true cost of sustainability, the value of paying for quality versus quantity of seafood, and the ultimate price that we will all pay if we fail to ensure the sustainable use of our oceans.





Mike Boots, Director, Sustainable Seafood Alliance. *June 2007* 19

STAINABLE? GREENPEA

Image Greenpeace campaigners in 2007, holding a banner asking 'Is your seafood sustainable?' in front of the Atomium in Belgium, where the European Seafood Exposition was taking place.

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 18 Evidence of this can be seen in the EU consultation and advisory bodies, such as the Advisory Committee for Fisheries and Aquaculture (ACFA) and the Regional Advisory Committees (RACs). These committees consist predominantly of representatives of the production sector—the catch and aquaculture sector take up around 50% of the seats. Strengthening the representation of retailers, processors, consumers and environmentalists is highly desirable. The representative consultation of all concerned stakeholder groups on fisheries and other oceans matters through such fora is a very tangible step that the EU, as well as any other political bodies and countries, can implement very swiftly. See also: http://ec.europa.eu/fisheries/partners/acfa/index_en.htm
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Greenpeace is an independent global campaigning organisation that acts to change attitudes and behaviour, to protect and conserve the environment and to promote peace.

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