Fishmeal news alert (sent by email 11 February 2015)

This monthly Seafish fishmeal industry news e-alert covers news items, legislation and reports. See also: http://www.seafish.org/industry-support/aquaculture/aquaculture-support/fishmeal-and-fishoil

Stock Status Reports

New assessment confirms Atlantic menhaden is not overfished, invalidates previous models and data, and calls into question subsequent harvest cuts and job losses. 15 January 2015.

The Atlantic States Marine Fisheries Commission has released the 2014 Atlantic Menhaden Stock Assessment, vetting the health of the Atlantic menhaden stock. The new assessment overhauled the models and data sources used in the last assessment in 2012 with improved, more accurate methods. The results determined that the Atlantic menhaden stock is not overfished, and overfishing is not occurring. http://www.prweb.com/releases/2014atlanticmenhaden/stockassessmentreleased/prweb12448750.htm

- Atlantic menhaden assessment. 3 February 2015.
  The Atlantic States Marine Fisheries Commission (ASMFC) has received the completed 2014 Atlantic Menhaden Benchmark Stock Assessment which finds that the menhaden fishery has less of an impact now than in its modern history. This assessment contains some of the most positive indicators for the health of the species over the past 60 years. http://www.worldfishing.net/news101/industry-news/atlantic-menhaden-assessment#sthash.e8JPyrT5.dpuf

Quotas and TACs

South Pacific nations agree small hike in jack mackerel TAC for 2015. 6 February 2015.

South Pacific fishing nations have agreed to set the total allowable catch for jack mackerel in the areas directly and indirectly managed by the South Pacific Regional Fisheries Management Organization at 460,000 metric tons for 2015 - a small increase from last year, a 4.5% hike from the TAC of 440,000t set in 2014 and 2013. It is however comfortably above the total catches of less than 20,000t reported for last year, and comes despite the commission saying the stock remains at "very low levels". The breakdown by member country is broadly similar to that of last year. Chile gets the lion share, with 297,000t and was the only one to see its TAC reduced, while all others saw their TAC slightly increased. Nevertheless, the TAC is far above the actual catch level reported by the members, which stood at a total of 366,000t for the high seas and Chilean waters by the end of October 2014, in addition to another 50,000t caught in Peru’s EEZ. http://www.undercurrentnews.com/2015/02/06/south-pacific-nations-agree-small-hike-in-jack-mackerel-tac-for-2015-ecuador-gets-minor-share/
Fishmeal news alert issued 11 February 2015

**Iceland capelin quota recommended to increase to 580,000t. 5 February 2015.**
The Icelandic Marine Research Institute has suggested an increase in the capelin fishing quota to 580,000 metric tons, up 320,000t since the last season, reports Iceland Review. [http://icelandreview.com/news/2015/02/02/capelin-fishing-quota-iceland-increase](http://icelandreview.com/news/2015/02/02/capelin-fishing-quota-iceland-increase)

In September 2014 ICES and MRI, advised that an initial quota of 225,000t (50% of a predicted TAC) be set for the season 2014/2015. This advice will be revised after autumn/winter surveys in 2014/2015. [http://www.hafro.is/Astand/2014/english/39-engl-sum-14.pdf](http://www.hafro.is/Astand/2014/english/39-engl-sum-14.pdf)

**Northeast Atlantic herring; blue whiting. 26 January 2015.**
Members of the North East Atlantic Fisheries Commission agreed on a total allowable catch (TAC) of 283,013 metric tons of Atlanto-Scandian herring for 2015, but failed to agree on how to share the stock. The members, which met in London in mid January also failed to agree on blue whiting management.

**Herring**
The herring TAC is in line with the advice issued by the International Council for the Exploration of the Seas last September. It represents a drop of 135,000 from the 2014 advice. No TAC had been set in 2014 due to disagreement with the Faroe Islands. However, the members -- the European Union, Iceland, Norway, the Faroe Islands and Russia failed to agree on how to share the herring stock in between themselves.

**Blue whiting stalemate**
Disagreement between the EU and Norway hindered a deal and no TAC or sharing arrangement was agreed on. The result is that the temporary arrangement will be the final one, unless parties meet again and agree on a new deal. Under this arrangement, Norway will take 36.8% of the total TAC across international waters, Norwegian and Faroese waters, in addition to 102,000t in the EU zone in line with its bilateral deal with the EU. ICES has advised a catch limit of 839,886t of blue whiting for 2015. Last year, the blue whiting coastal states set a huge TAC of 1.2 million metric tons of blue whiting, exceeding ICES' advice of 948,950t. [http://www.undercurrentnews.com/2015/01/26/no-agreements-on-northeast-atlantic-herring-blue-whiting/?utm_source=Undercurrent+News+Alerts&utm_campaign=bebe5b5ad5-Europe_briefing_Jan_26_2015&utm_medium=email&utm_term=0_feb55e2e23-bebe5b5ad5-91339593](http://www.undercurrentnews.com/2015/01/26/no-agreements-on-northeast-atlantic-herring-blue-whiting/?utm_source=Undercurrent+News+Alerts&utm_campaign=bebe5b5ad5-Europe_briefing_Jan_26_2015&utm_medium=email&utm_term=0_feb55e2e23-bebe5b5ad5-91339593)

**Peru’s 2015 fishmeal exports projected to increase 12% amid anchovy fishing recovery. 22 January 2015.**
Peruvian anchovy catches are expected to recover in 2015 and reach previous years' volumes based on forecasts of cooler waters, which would allow to improve stocks. Last year, anchovy catches totaled 2.2 million metric tons, a significant decrease compared to the 6.8m metric tons caught in previous years on average.
Based on the latest report by Peru’s marine institute Imarpe, which re-iterated its advice to suspend fishing, last year’s second anchovy season was cancelled. The latest Imarpe’s report showed anchovy stock was reduced by end of last year, with very low densities in the northern region, which is the main area of fishing for anchovy. New research is finding now that anchovy is back in Peruvian waters. [http://www.undercurrentnews.com/2015/01/22/perus-2015-fishmeal-exports-projected-to-increase-12-amid-anchovy-fishing-recovery/?utm_source=Undercurrent+News+Alerts&utm_campaign=0da9de9d14-Europe_briefing_Jan_22_2015&utm_medium=email&utm_term=0_feb55e2e23-0da9de9d14-91339593](http://www.undercurrentnews.com/2015/01/22/perus-2015-fishmeal-exports-projected-to-increase-12-amid-anchovy-fishing-recovery/?utm_source=Undercurrent+News+Alerts&utm_campaign=0da9de9d14-Europe_briefing_Jan_22_2015&utm_medium=email&utm_term=0_feb55e2e23-0da9de9d14-91339593)
Ever-growing demands and extreme supply constraints pushed fishmeal and fish oil prices to a record high in late 2014. Peruvian anchovy fishing and thus fishmeal and fish oil production have been affected by a moderate El Niño phenomenon for all of 2014. However, until June 2014 prices for fishmeal in international markets did not respond significantly to the anticipated supply shortage likely to be the result of the low anchovy catches in Peru. Nevertheless, ever-growing demands and extreme supply constraints pushed fishmeal and oil prices up again from August, when the actual reduction in catches was apparent.

The total fishmeal production for the first three quarters of 2014 was slightly more than the same period of the past two years, but production in Denmark and Norway increased significantly by 32%. In Peru, the low catch of anchovy was caused primarily by the moderate El Niño phenomenon. Despite the deadline being extended to 10 August, only 68% (or 1.71 million tonnes) of the Total Allowable Catch (TAC) of the first fishing season was caught compared with the higher percentage of catch during the two seasons of 2013, during which 2.05 and 2.3 million tonnes respectively were caught. This suggests that fishmeal production in the fourth quarter of 2014 will decrease.

### Fishmeal production

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peru/Chile</td>
<td>2,063</td>
<td>2,039</td>
<td>1,274</td>
<td>2,160</td>
<td>1,161</td>
<td>855</td>
</tr>
<tr>
<td>Denmark/Norway</td>
<td>302</td>
<td>274</td>
<td>345</td>
<td>256</td>
<td>140</td>
<td>190</td>
</tr>
<tr>
<td>Iceland</td>
<td>251</td>
<td>198</td>
<td>146</td>
<td>134</td>
<td>169</td>
<td>176</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,616</strong></td>
<td><strong>2,511</strong></td>
<td><strong>1,855</strong></td>
<td><strong>2,607</strong></td>
<td><strong>1,801</strong></td>
<td><strong>1,477</strong></td>
</tr>
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</table>

### Fishmeal production – January to September

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<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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</thead>
<tbody>
<tr>
<td>Peru/Chile</td>
<td>1,442</td>
<td>1,281</td>
<td>1,502</td>
<td>1,066</td>
<td>799</td>
<td>809</td>
</tr>
<tr>
<td>Denmark/Norway</td>
<td>230</td>
<td>381</td>
<td>183</td>
<td>80</td>
<td>177</td>
<td>234</td>
</tr>
<tr>
<td>Iceland</td>
<td>178</td>
<td>202</td>
<td>92</td>
<td>158</td>
<td>133</td>
<td>136</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,850</strong></td>
<td><strong>1,751</strong></td>
<td><strong>1,808</strong></td>
<td><strong>1,390</strong></td>
<td><strong>1,235</strong></td>
<td><strong>1,463</strong></td>
</tr>
</tbody>
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### In the UK

The UK imported slightly more fishmeal than in the same period of 2013, but the overall trend is still down. In the last two years the UK has reduced its dependence on Peruvian fishmeal supply, mainly because production and prices were adversely affected by lower quotas or weather issues.

### Fishmeal imports into the UK

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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</thead>
<tbody>
<tr>
<td>January to December</td>
<td></td>
<td></td>
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<tr>
<td><strong>Total</strong></td>
<td>114.5</td>
<td>101.4</td>
<td>83.9</td>
<td>74.1</td>
<td>65.8</td>
<td></td>
</tr>
<tr>
<td>January to September</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>83.2</td>
<td>79.0</td>
<td>65.6</td>
<td>59.3</td>
<td>47.0</td>
<td>50.3</td>
</tr>
</tbody>
</table>

*Source: Globefish*
Reports/brochures/web sites/presentations

IFFO Update. February 2015.

Industry news
2015 Seafood Champion Award for Leadership awarded to IFFO’s Andrew Jackson. 10 February 2015.
IFFO Technical Director, Dr Andrew Jackson, has been presented with the 2015 Seafood Champion Award for Leadership. The 2015 Seafood Champion Award for Leadership was awarded to IFFO's Dr Andrew Jackson for working with stakeholders toward creating a uniform standard and encouraging responsible production of fishmeal and fish oil, often used as feed in aquaculture. As a result of his efforts, 100+ fishmeal/fish oil production plants across nine countries are now independently certified to IFFO’s standard.

Nutreco to launch reduced-fishmeal shrimp feed early in 2015. 6 February 2015.
Animal nutrition firm Nutreco is to commercially launch a reduced-fishmeal shrimp feed product early in 2015. Having already brought the fishmeal content in its salmon feed down from 30% to 5%, Nutreco has got the content in its MicroBalance shrimp feed down from 25% to 15%. In 2014, 40.7% of Skretting's sales came from non-salmonid feeds. This was up from just 20% a few years ago. Its acquisitions through 2013 and 2014 took it into eight new markets, and several new species, including shrimp.

Following public consultation the IFFO RS Certification Programme has launched a new version of its IFFO RS standard for marine ingredient producers. This new version (Version 1.6) will cover - in addition to all the previous parts of responsible sourcing and responsible production - basic social and environmental aspects at the factory level. This new version will be enforced to all producers and certificate holders from 1 May 2015. In addition:
- The IFFO RS Certification Programme has now become a separate legal entity in its own right, with its own multidisciplinary Governing Board.
- In order to increase the transparency of the standard and to facilitate more robust traceability, a list of MSC fisheries has been added to the raw material section of the IFFO RS website.
- The IFFO website also now includes a list of approved IFFO RS by-products from aquaculture sources.
- The new parts of this new IFFO RS Standard V1.6 were open for public consultation for a period of 30 days.
http://www.iffo.net/node/729
IFFO response to the recent paper on China’s aquaculture and the world’s wild fisheries. 20 January 2015.

IFFO welcomes a recent paper published in Science entitled *China’s aquaculture and the world’s wild fisheries* and recognises it as a useful and timely contribution, but there are inaccuracies that need highlighting. “**IFFO supports the central message of this paper that the Chinese government and industry must ensure that both imported and domestically produced fishmeal is produced from responsibly managed fisheries. However, as with most modern aquaculture, in China the amount of fish used in feed is now less that the amount of farmed fish produced.**”

China’s aquaculture and the world’s wild fisheries -
http://www.sciencemag.org/content/347/6218/133.summary
http://www.iffo.net/node/720

See also

- Seafish aquaculture web page: http://www.seafish.org/industry-support/aquaculture
- For guides and information see: http://www.seafish.org/industry-support/aquaculture/aquaculture-support/guides-and-information
- For the Aquaculture Common Issues Group minutes and presentations see: http://www.seafish.org/industry-support/aquaculture/aquaculture-groups/aquaculture-common-issues-group

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