

August/September 2018

Common Language Group e-alert

(amalgamation of adhoc news alerts issued to CLG circulation list by email in Aug and Sept 2018)

Common Language Group

<http://www.seafish.org/responsible-sourcing/discussion-forums/the-common-language-group>

**Seafish consumption briefing notes**

**Seafood in Multiple Retail up to June 2018**

Over the past 10 years, total seafood (the sum of chilled, frozen and ambient seafood sectors), continues the long term pattern of price driven growth; with seafood consumption continuing to decline and average price increasing. Salmon continues to dominate total seafood with a 33% value share of the top ten species, selling over twice the amount of cod, its nearest competitor, by value.

**Chilled Seafood in Multiple Retail (2018)**

The chilled seafood sector continues to take the largest share of the multiple retail seafood market with a wide range of segments and species. It is unique in being the only seafood sector in consistent growth from 2007 to 2017. However, pressure from falling shopper confidence and reduced spending power has seen chilled volume decline in 2018.

**Frozen Seafood in Multiple Retail (2018)**

In the 52wks to June 2018, frozen seafood was the only seafood sector in volume growth as shoppers looked to save money in the current economic climate.

**Market Insight Factsheet Haddock (2018 Update)**

In 2017 the volume of UK haddock supply increased through both a rise in import volume and UK vessels increasing their volume of landings. Export volume of haddock also increased. In 2018 (up to latest available data) sales of haddock in retail and commercial foodservice increased.

**Market Insight Factsheet Mackerel**

The factsheet provides a summary of the United Kingdom (UK) value chain for mackerel. It covers overall mackerel performance including UK trade and supply (2017) and Mackerel consumer sales (data to 11th August 2018). In 2017 the volume of UK mackerel supply increased through a rise in import volume. However, landings and export volume of mackerel experienced declines. In 2018 (up to latest available data) sales of mackerel in retail increased and commercial food service decreased.

**Microplastics**

**Seafish briefing. Update on the sources, fate, effects and consequences for the Seafood Industry of microplastics in the marine environment. July 2018.**

This short report is an update of a previous Seafish Information Sheet. Includes key findings from recent research studies on the implications of plastics on the marine environment, which includes:

- The extent of microplastics contamination in land and freshwater systems as a key source of contamination of the marine environment through fresh-water run-off.
- Microplastic particles in seafood are considered to be a small source of human exposure to these substances compared with other dietary sources.
- An improved understanding of the physiological pathways of microplastics; some particles smaller than 150 micrometres have been observed to cross the digestive tract wall in mammals, but how the body deals with these particles is still unknown. The ability of

nanoplastic particles to access organs has been highlighted but there is still uncertainty about the physiological impacts.

- Risk that laboratory contamination could result in higher levels of microplastics being recorded in fish.
- Time series data on plastic levels in the North Sea has been analysed and found to be stable since 2000 but at a level well above the agreed environmental quality objective.

### **Fish stock status**

#### **New ICES advice on widely distributed stocks. 28 September 2018.**

The International Council for the Exploration of the Seas (ICES) has recommended a big cut in the 2019 North East Atlantic mackerel total allowable catch (TAC) to what would be a record low, with fishing pressure high and no management plan in place. ICES advised a catch of no more than 318,403 metric tons in 2019, down 42% from the level of 550,948t for 2018. In addition ICES has advised the blue whiting TAC in the North East Atlantic and adjacent waters should be no more than 1.14 million metric tons, down from 1.39m in 2018, when the long term management strategy agreed by the EU, the Faroe Islands, Iceland, and Norway is applied. Last year, against ICES advice the 2018 TAC was set at 1.73m metric tonnes. There is an increase recommended in the horse mackerel TAC. ICES advises the catches in 2019 should be no more than 145,237t, up from 117,070t in 2017, when the quota was actually set at 115,470t.

#### **HELCOM - State of the Baltic Sea Report. 26 September 2018.**

The recently updated HELCOM State of the Baltic Sea report provides a complete insight about the ecological state of the Baltic Sea and the pressures affecting it. Overall, despite improvements, the sea is not yet in a good state, with eutrophication causing the major stress. According to the report, improvements are seen in the reduction of inputs of nutrients and hazardous substances into the Baltic Sea. The progress made so far shows that concerted Baltic Sea regional collaboration leads to tangible results. However, the ecological objectives set by the Baltic Sea Action Plan seeking to attain a healthy Baltic Sea by 2021 have not yet been attained.

#### **Scientists see evidence of major progress in European fisheries: 39 % more fish in the sea than in 2003. 17 September 2018.**

Europêche has welcomed the clear message from the scientific community and DG MARE at the Scientific Seminar on Fisheries Science which evidenced in the North East Atlantic a drastic reduction in fishing pressure which is now stabilizing at sustainable levels. As a consequence, overexploited stocks decreased by 43% in the last decade and the proportion of stocks outside safe biological limits dropped by more than half during the same period. Fish populations have been generally increasing, reaching in 2016 biomass levels 39% higher than in 2003. Many stocks have recovered and are delivering stable and sustainable catches, highlighting that the joint efforts made by the industry, institutions and scientists are paying off. In the Baltic, North Western and South Western waters, for the stocks managed by the EU alone; 95%, 94% and 90% respectively of the expected landings come from Total Allowable Catches (TACs) set in line with the Maximum Sustainable Yield (MSY). In the North Sea, the situation is even better since this figure reaches 99.7% of the expected landings.

#### **App launched by Oceana would estimate fish stock recovery. 12 September 2018.**

Catchy Data makes it possible to calculate the recovery of fish stocks if the fishing activity is carried out in a sustainable manner. The application stipulates how much of the catches of the main commercial species could be increased, how many jobs could be created, potential net benefits, profits for the related sectors, etc., making it easier for users to explore data from European Union countries and calculate the potential benefits to modify EU fishing practices. [Video Catchy Data](#)

**[Europeche: Science reveals that less than 4% of the global ocean is fished.](#) 7 September 2018.**

Earlier this year, a group of researchers claimed that fishing activities occurred in 55% of the world's oceans. As a result, their study found that the area fished is four times bigger than the area occupied by agriculture in terms of square kilometres. Europeche argued that the study was based on scientifically unsound data, overestimating the proportion of the seabed where fishing occurs. A new scientific research developed by the Department of Marine Sciences and Fisheries of the University of Washington evidences this by showing that when low-resolution data are replaced by high-resolution data, the true footprint of fishing is revealed to be less than 4%. Science confirms that fishing continues to hold the first place as the lowest impact production method.

**[Commission proposes Baltic TACs for 2019.](#) 3 September 2018.**

The Commission has adopted a proposal for fishing opportunities for 2019 for the commercially most important fish stocks in the Baltic Sea. In particular, the Commission proposes to increase catches for plaice, Western cod, sprat, Gulf of Riga herring and the Main Basin salmon stocks. For the remaining stocks covered by the proposal the Commission proposes a reduction in catches.

**Certification**

**[MSC announces changes to labour reporting, objections and stakeholder engagement.](#) 31 August 2018.**

The Marine Stewardship Council has released its updated Fishery Certification Process v2.1. This includes several changes to its Fisheries Certification Process following a review that began in 2016. The Fisheries Certification Process contains the requirements that Conformity Assessment Bodies must follow when assessing fisheries against the MSC Fisheries Standard. The updated process will come into use after 28 February 2019, and will apply to all new assessments, as well as all reassessments, surveillance audits, scope extensions and expedited audits. The new labour requirements included in the update must be complied with by all fisheries in the MSC program by 31 August 2019. The changes include: new labour requirements to mitigate the presence of forced or child labour; more meaningful stakeholder input; harmonisation with assessments of overlapping fisheries in the MSC program; and an early consultation phase in objections.

**[MSC undertaking review of its fisheries standard.](#) 25 September 2018.**

The Marine Stewardship Council is looking into changes to the requirements of its standards for certifying fisheries as sustainable. The MSC has initiated a review of its fisheries standard, a process the organization undertakes every five years. On Tuesday, 25 September, it released its terms of reference for the review, which outlined which parts of its standard it will look at in detail – a first step in a potentially three-year-long process of revision.

**[MSC survey dives deep into consumer seafood trends.](#) 23 September 2018.**

A survey commissioned by the Marine Stewardship Council has taken a deep look at what 25,000 consumers in 22 countries think about sustainability in seafood. Overall, the survey highlights that consumers are increasingly aware of sustainability and are concerned about the state of the oceans, particularly plastic pollution and overfishing. Of those surveyed, 72% said there's a need for brands and supermarkets to verify claims about sustainability (up from 68% in 2016) and 70% said they'd like to hear more from companies about the sustainability of their products. With so much data on virtually every age group and preference in the 22 countries, MSC is hosting three different webinars on Tuesday, 9 October to help make sense of it all in Hong Kong, London, and Seattle.

**Brexit**

**[Fisheries Brexit negotiations.](#) 6 September 2018**

Following Brexit, the UK will no longer be part of the EU Common Fisheries Policy. It will become an independent coastal state and be fully responsible for managing fisheries in the UK's Exclusive

Economic Zone of 200 miles. This will include setting total allowable catches (TACs), distributing quotas and determining who has access to fisheries. However, access for EU vessels to UK waters and vice versa is likely to be part of any agreement reached with the EU, as part of a future relationship. The [Fisheries White Paper Sustainable fisheries for future generations](#), published in July 2018, set out the Government's intention to continue to co-operate closely with the EU and other coastal states on the sustainable management of fish stocks that cross borders, and states that "any decisions about giving access to our waters for vessels from the EU, or any other coastal states including Norway, will then be a matter for negotiation". [Full report](#).

#### **Continuing debate around electric pulse fishing ban**

##### **Call for pulse beamers fraud probe. 25 June 2018.**

An international alliance that is fighting for an EU ban on electric pulse beaming has filed a formal request to the European Anti-Fraud Office (OLAF) to investigate whether fraud has occurred in relation to the Dutch electric trawl fishery. 23 environmental NGOs and fishermen's organisations, from the UK, France, Germany and the Netherlands, say there is evidence that Dutch pulse beam trawlers and research institutes were granted substantial amounts of undue public subsidies.

##### **ICES advice on the ecological and environmental effects of pulse trawling. Published 30 May 2018, updated 18 June 2018.**

ICES explores some of the key points in the advice on the impact of electric pulse trawls compared to traditional beam trawls in the exploitation of North Sea sole. ICES advises that there are fewer ecological and environmental effects of using pulse trawls than traditional beam trawls when exploiting the total allowable catch (TAC) of North Sea sole.

##### **IFREMER (the French Research Institute for the Exploitation of the Sea) criticizes scientific advice on Electric Fishing. 21 June 2018.**

##### **BLOOM In-depth analysis of ICES' advice on electric fishing. 4 June 2018.**

#### **Illegal, Unreported, Unregulated (IUU) fishing**

##### **EU to keep yellow card for Thailand. 18 May 2018.**

The European Union (EU) has decided to keep a yellow card for Thailand over the country's illegal, unreported and unregulated (IUU) fishing problems, according to a source at the Agriculture and Cooperatives Ministry. Two issues behind the EU decision to not upgrade Thailand's Anti-IUU ratings are fleet management and laws enforcement. The EU apparently found discrepancies in boat categorization at the Marine Department and expects to see strict laws enforcement, efficient management of administrative orders and clear time-frames.

##### **How much fish do we consume? First global seafood consumption footprint published. 27 September 2018.**

According to the JRC, the EU science and knowledge service, global seafood consumption has more than doubled in the past 50 years, putting stress on the sustainability of fishing. JRC scientists have examined the impact of seafood supply chains across national boundaries - the global seafood consumption footprint. Taking into consideration both food that humans consume and seafood processed for feed production, seafood consumption in EU member states equals 27 kg per head. The highest consumption at EU level is observed in Portugal (61.5 kg per head) while outside the EU, the top consumers are Korea (78.5 kg per head) followed by Norway (66.6 kg per head). The global per head consumption is estimated at 22.3 kg.

**[Fishcoin incentivizing blockchain-based traceability in developing nations.](#) 5 September 2018.**

A new initiative called “Fishcoin” could be the key to incentivizing data collection by fishers and fish farmers in developing nations. Fishcoin is a new way to give seafood harvesters in developing nations an incentive to collect data on their catch. Utilizing blockchain technology, Fishcoin will give fishermen tokens for topping up their mobile phone data plans in exchange for collecting and submitting information on their catch. The motivation behind the initiative is to gather more data in areas where the industry largely doesn’t have any way to increase the efficiency and sustainability of fisheries.

**[Published paper. Evolution and the future of the sustainable seafood market.](#) August 2018.**

An interesting perspective on the journey and relative success (or not) of sustainable seafood.

**[Published paper. Fishery improvement projects: Performance over the past decade.](#) November 2018.**

Drawing on a comprehensive dataset of attributes on all public FIPs, combined with sustainability performance data on the management of the target fisheries, their fishing levels, and stock status, this paper evaluates the performance of FIPs worldwide on improving fisheries, using exploratory data analysis methods and regression-based statistical approaches. The results showed that FIPs have improved fisheries with statistical significance (some exceptions were found but not restricted to any category of FIPs); FIPs performed particularly well in adding precaution to harvest strategies; the more critical fishery issues, the more effective the improvement by FIPs; and fisheries with FIPs performed significantly better than those without.

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