

August/September 2018 fishmeal news alert (sent by email 9 October 2018)

This 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>

### Seafish news and reports

[Seafish summary of 2018 ICES advice for pelagic stocks \(as at 8 October 2018\)](#)

Published 8 October 2018.

### [Fishmeal and fish oil facts and figures](#). March 2018.

These fishmeal and fish oil facts and figures draw together the latest available data on World, European and UK markets, as well as the supply of fishmeal and fish oil for land animals and fish feed.

### **Pelagic Industry Issues Group meeting. Thursday 27 September 2018 in Aberdeen.**

The group met on Thursday 27 September 2018 in Aberdeen. The presentations have all been added to the [Seafish PIIG webpage](#) The notes on the meeting will follow.

### **North East Atlantic and Baltic Fish Stock Status**

[New ICES advice on widely distributed stocks](#). 28 September 2018.

New ICES advice on widely distributed stocks was issued on 28 September.

- **North East Atlantic mackerel:** 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. The current assessment showed that the spawning stock biomass (SSB) is declining, and that due to a combination of high fishing pressure and below average recent recruitments, short-term projections indicate that the SSB will continue to decrease in 2018 and 2019. ICES advised a catch of no more than 318,403 metric tons in 2019, down 42% from the level of 550,948t for 2018.
- **Blue whiting:** 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.
- **Horse mackerel:** 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.

### **Commentary**

[Pelagic fishers at odds with proposed NEA mackerel quota cuts](#). 4 October 2018.

ICES has come under fire from the Scottish Pelagic Fishermen's Association (SFPA) for its advised cuts for next year's North East Atlantic mackerel catch who state there was 'considerable uncertainty' over the accuracy of this year's scientific assessment due to a number of factors, including concerns over how the assessment model uses data from tagged mackerel, which has "pulled down" the calculated spawning stock biomass

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figure. Ian Gatt highlighted that tagged mackerel data has only been used in the assessment process in recent times, and because its data shows a much higher biomass reduction, it conflicts with other data in the scientific process, throwing doubt on the overall stock assessment. The ICES perception of the stock is also contrary to that witnessed by fishermen on the fishing grounds,

**Deadline set for MSC herring audit. 13 September 2018.**

The North East Atlantic Norwegian spring-spawning (NSS) herring fishery has had a date set for its next Marine Stewardship Council (MSC) surveillance audit – 16 and 17 October. This audit is significant as an expedited audit into the fishery this year found the certificate would remain in place, despite concerns over both stocks and fishery management.

**Reports/brochures/web sites/presentations/articles**

**2018 reduction fisheries report shows overall improvement in the sustainability of fisheries used for fishmeal and fish oil. 4 October 2018.**

More than 90% of the fish used for fishmeal and fish oil from the Atlantic and Eastern Pacific now come from fisheries that can be classified as “reasonably well-managed (or better),” according to the latest annual report on reduction fisheries from Sustainable Fisheries Partnership (SFP). The report, which analyzes 26 reduction fishery stocks worldwide, found that 91% of the total catch volume came from stocks that scored 6 or better on all five criteria outlined by SFP’s FishSource database. This marks an 8% increase in performance compared to last year.

- 9% (0.8 million tonnes) of the total catch for reduction purposes comes from poorly managed fisheries (Category C), a drop from 16% last year. The volume coming from poorly managed fisheries has been decreasing since 2016, and is currently the lowest percentage since the annual overview began publication in 2011.
- Of the stocks listed in “very good condition,” or Category A status, the report once again singled out the Antarctic krill fishery in the Atlantic Southern Ocean as being particularly well-managed.
- Of the fisheries analyzed, changes in sustainability categories from last year were observed in five fisheries. Four fisheries improved their status: Southeast Pacific Chilean jack mackerel (B2 to B1), Araucanian herring from Central-South Chile (B2 to B1), Southern Peru/Northern Chile anchoveta (regions XV-I-II) (C to B2) and Barents Sea Capelin (C to B2).
- One fishery decreased in its sustainability category: European pilchard from Northwest Africa southern stock (Mauritanian management unit) (B1 to C).
- Progress toward improvements and certification continues, in particular for the Atlantic and Eastern Pacific reduction fisheries. Out of the Atlantic and Pacific stocks covered in this overview, 11 have fisheries that are already covered by the MSC program, 18 have fisheries that are covered by the IFFO Responsible Sourcing program (either as approved whole raw material or by-product), and two are covered by fishery improvement projects (FIPs) that are making good progress.

**Reduction Fisheries: SFP Fisheries Sustainability Overview 2018**

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**[Blog: What are the Impacts and Solutions to Rising Feed Ingredient Prices for Aquaculture?](#)** 28 August 2018.

This is based on FAO Fisheries and Aquaculture Technical Paper No. 541 and how their findings are impacting aquaculture. Aquaculture has steadily increased from 4% of the market in 1970 to a 9-times increase of 36% in 2006, with continued growth expected. The study mentioned the rising costs of aquaculture feed ingredients. The brunt of these increases are expected to be borne by small holders and rural farmers, though digitization creates the opportunity for feed mills to meet the needs of these smaller customers through better efficiency in the feed production process. Overall, the increasing price and demand for fishmeal and fish oil will drive demand for alternatives to these products, allowing the industry to continue competing and meeting the challenges of securing aquafeed for sustainable production.

**[Technavio report: Global aquaculture market's growth accelerating through 2022.](#)** 20 July 2018.

The global aquaculture market is experiencing robust growth, which is likely to accelerate through the year 2022, according to a report from the market research firm Technavio. The report, [Global Aquaculture Market 2018-2022](#), presents an analysis of the global aquaculture market based on end users (commercial and residential); by product (freshwater fish, crustacean, mollusks, diadromous fish, and others); by environment (freshwater, marine water, and brackish water); by culture (net pen culture, floating-cage culture, pond culture, and rice field culture); by geography (the Americas, APAC, and EMEA); and by market, organized by distribution channel. The report attributes aquaculture's rising success to the world's growing human population, its hunger for seafood, and the decline of the captured fish industry.

**[Making aquafeed more sustainable: Scientists develop feeds using a marine microalga co-product.](#)** 18 August 2018.

Scientists have created a more sustainable feed for aquaculture by using a marine microalga co-product as a feed ingredient. The study is the first of its kind to evaluate replacing fishmeal with a co-product in feed designed specifically for Nile tilapia.

**[IFFO Update. August 2018.](#)**

**[IFFO Update. September 2018](#)** (but in Spanish).

**[General news](#)**

**[PUBLIC CONSULTATION: Development of the IFFO RS Chain of Custody Standard V2.0.](#)** 18 September 2018. Closing date 18 October 2018.

In order to safeguard the IFFO RS CoC standard's relevancy, robustness and credibility, as well as satisfying market requirements, the IFFO RS Governing Body Committee agreed with the proposal to undertake the development of the new IFFO RS CoC version 2.0. Proposed changes to the standard will cover effective integrated management systems, subcontractors, labelling and logo control, personnel competencies, social and environmental aspects. In addition, traceability and mass balance exercises will be included in the new version and the activities of the users such as traders, refiners, storage will be differentiated.

**[Bressay fishmeal factory sold to Pelagia.](#)** 9 July 2018.

Norwegian seafood producer Pelagia has bought out local interests in the struggling Bressay fishmeal factory to further consolidate its position in Shetland. Shetland Fish Products Limited is now wholly owned by Pelagia Shetland Limited after Lerwick Port

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Authority, Seafood Shetland and Shetland Fish Producers' Organisation, who took on full ownership about six years, all agreed to sell their shares. Pelagia Shetland also owns half of the Shetland Catch pelagic factory and through that it already had a 36% share in the fishmeal and oil factory at Heogan in Bressay.

**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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