

# Fishmeal and fish oil fisheries – current status and future opportunities



**Anton Immink, Aquaculture Director  
Sustainable Fisheries Partnership**



# Who is SFP

- Non-profit/NGO created to educate and assist supply chain to improve fisheries and aquaculture grow-out regions
- Core approach to **improve access to information** to guide responsible seafood sourcing, and enhance the ability of seafood companies and partners to improve fish-farming and capture fisheries
- 60 staff in 15 market and producer countries.
- Dedicated science, market and field teams
- Partnerships with many global retailers and suppliers

# The problem

- The aquaculture industry needs access to marine resources for feed – fishmeal and fish oil – which are obtained from wild fisheries but these resources are not always well managed.

# There are partial solutions

- The development of fishmeal and fish oil from by-products is increasing (perhaps in excess of 33% of the market in the UK)
- Alternative feed sources are being developed, e.g. methane-derived materials, insects
- Genetically modified vegetable oils with omega-3s
- Aquaculture is becoming ever more efficient in the way it uses feed materials

But it does not solve the problem!

# They are only partial solutions.....

- Demand for fishmeal and fish oil keeps growing
- Fishmeal and fish oil are excellent feed ingredients which will out perform their rivals
- Aquaculture needs fishmeal and fish oil!

# Responsible fishmeal/fish oil

Fishmeal and fish oil need to come from responsibly managed sources, for example:

- Marine Stewardship Council certified
- IFFO RS certified
- From a Fishery Improvement Project

# Responsible feed sources recognized by aquaculture certifications

- GAA BAP – 50% MSC or IFFO RS or in a FIP
- ASC – MSC after five years (IFFO before that) but this standard is changing. May well include FIPs

# The Principal Question:

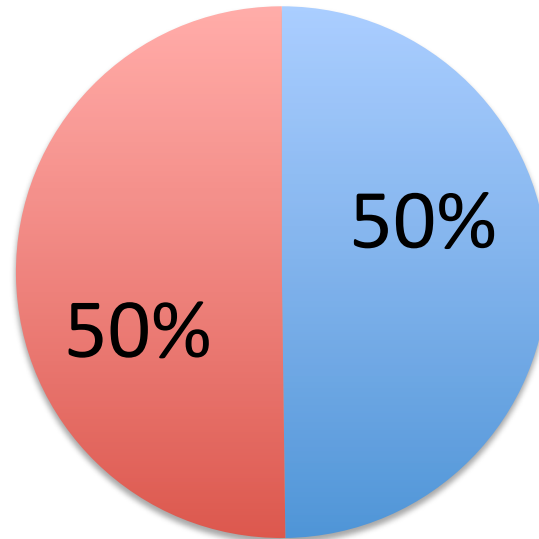
Is there enough responsibly produced fishmeal and fish oil to meet the demands of aquaculture certifications?



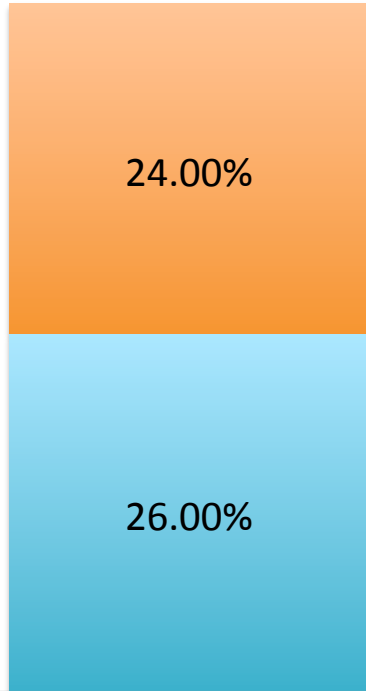
# The major sources of fishmeal

Total catch per type reduction fishery (' 000t)

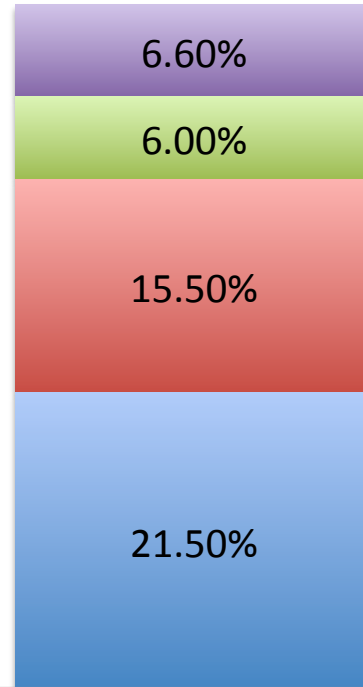
■ Atlantic/Pacific reduction fisheries    ■ SE Asia reduction fisheries



# Major sources of fishmeal



SE Asia reduction fisheries

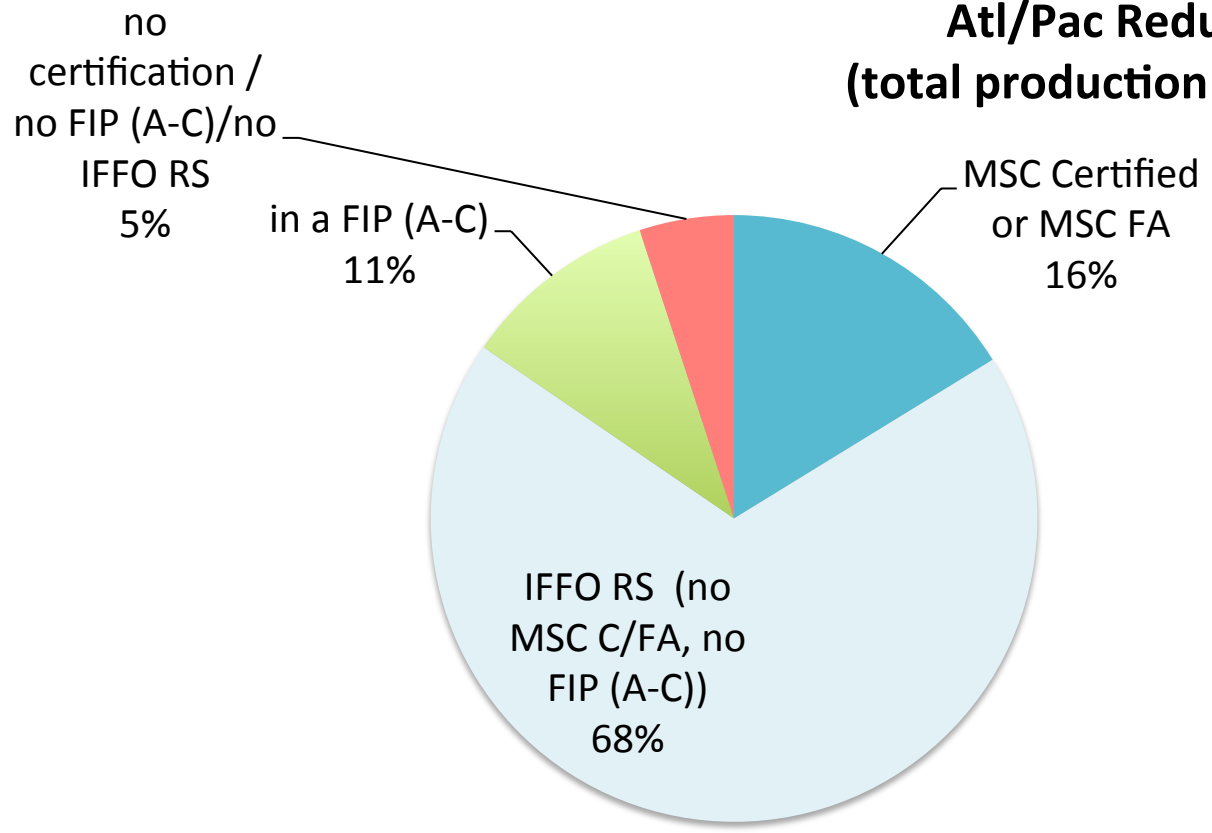


Atlantic/Pacific reduction fisheries

- multi-species trawl
- directed small pelagic fisheries
- other Atl/Pac regions
- Eastern Central Atl
- NE Atl
- SE Pacific

# Status of Atlantic and South American fishmeal/oil fisheries

**Atl/Pac Reduct Fish**  
**(total production: 8,973.7 kt)**



# Atlantic fisheries

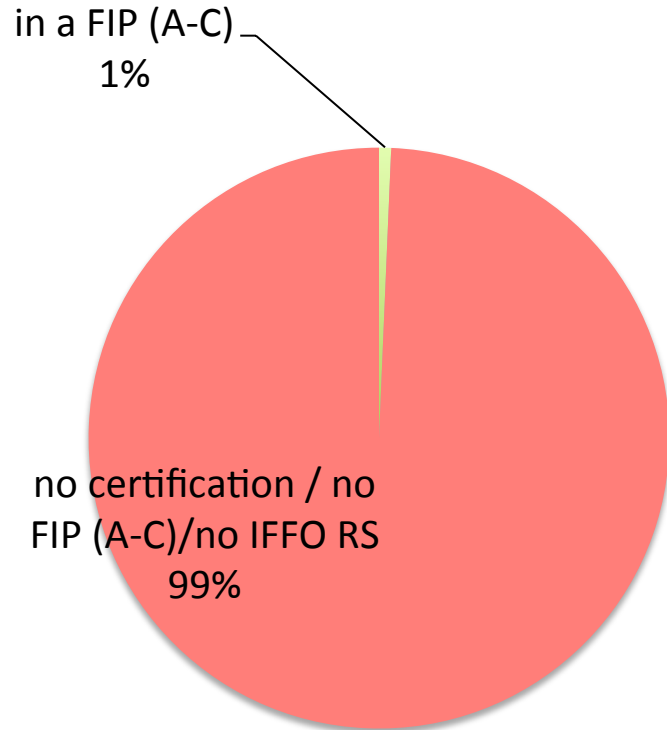
- Single-species fisheries that are generally well managed
- Many Atlantic fisheries are improving and are IFFO RS approved
- Presence of MSC is growing. Blue whiting is now MSC certified, Icelandic capelin and others are in MSC full assessment. Northwest African fisheries may join the program
- Expect a significant increase in the volume of MSC-certified fishmeal/oil – perhaps 15% of global production within next 2/3 years.

# South America

- South America is static – fisheries are generally competently managed but are not improving
- Many IFFO RS approved fisheries
- Some signs of interest from Chile in MSC fisheries but Peru remains elusive

# South East Asia fisheries

## SE Asia Reduct Fish (total production: 9,050.2 kt)



MSC Certified or  
MSC FA  
0%  
IFFO RS (no MSC C/  
FA, no FIP (A-C))  
0%

## South East Asia

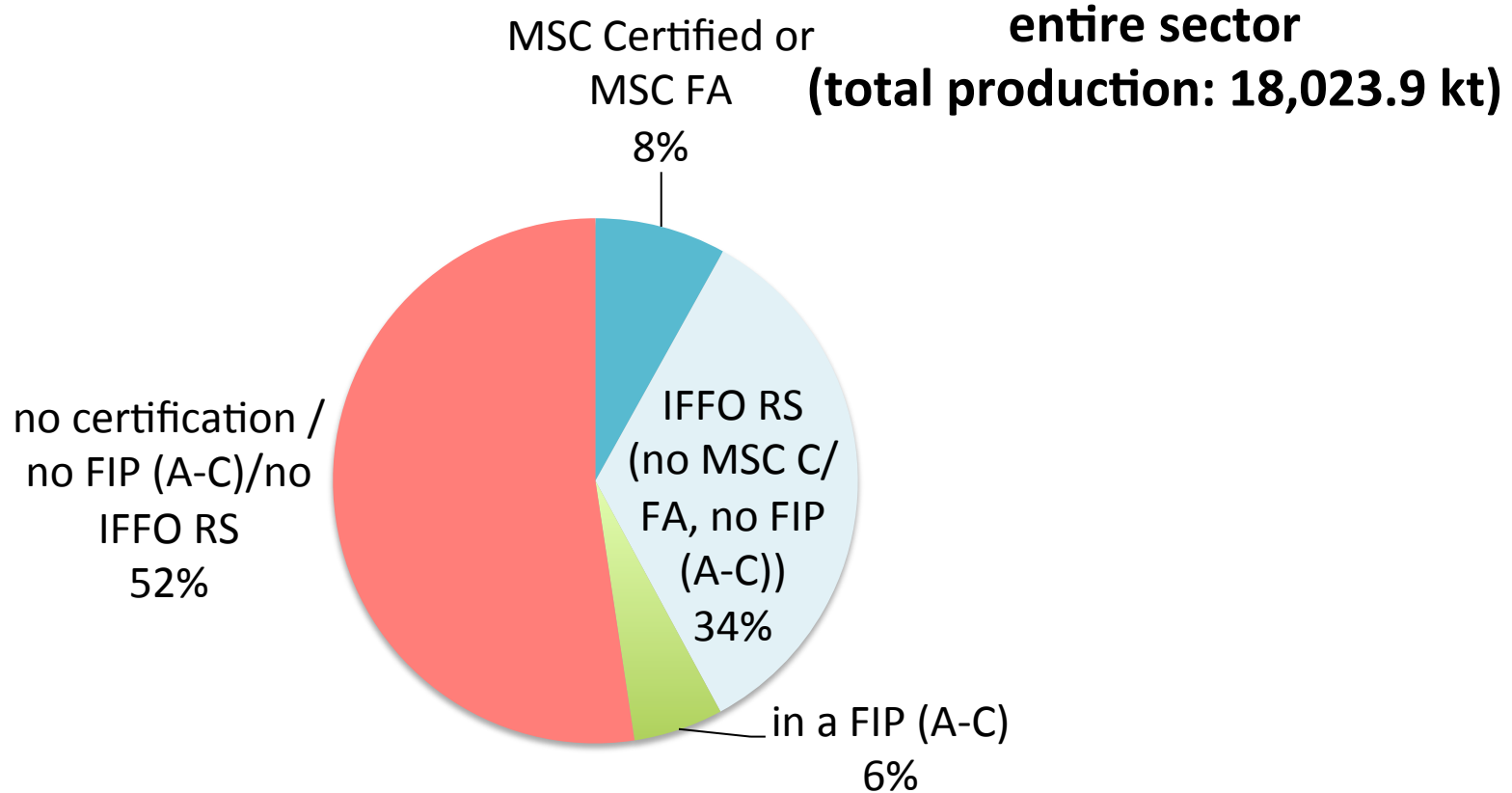
- Fish come from many different fisheries with different gear types
- A lot comes from multispecies fisheries but there are single-species small pelagics as well
- Fisheries data is severely lacking – a lot of uncertainty about volumes
- Fisheries management is generally very poor and ecological impacts very high
- No certified reduction fisheries and few FIPs



A wide mix of species ↑  
including vulnerable species →



# Status of global supply



# Summary

## Good news

- Most (95%) fishmeal and fish oil derived from the Atlantic or South America meets GAA BAP feed mill criteria

## Bad news

- Most (99%) fishmeal and fish oil from SE Asia does not meet GAA BAP feed mill criteria

# Meeting the Asia fishmeal challenge

- There are unlikely to be any certified reduction fisheries in Asia any time soon
- Fishery improvement projects (FIPs) are the best short-term option
- If you want to be able to buy Asian fishmeal you need to support FIPs

# What is a FIP?

A FIP is an alliance of buyers, suppliers and producers that work together to improve a fishery, by:

- Pressing for better policies and management
- Voluntarily changing fishing practices
- Communicating their actions with buyers

# How FIPs Work

Fishery Assessment: MSC pre-assessment, IFFO RS gap analysis, FishSource profile, other third party assessment

Formation of a FIP: Stakeholders agree to join as participants



# How FIPs Work

**Agreement of a Workplan:** Outlines tasks needed to make improvements and assigns responsibility

**Implementation:** Working with government, improving data, gear changes, policy changes, etc.

**Reporting:** Public updates of progress against the workplan





## The Seafood Industry **Guide to FIPs**

An introduction to setting up and  
running a fishery improvement project

# FIP DIRECTORY

[HOME](#)[ABOUT US](#)[VIEW FIPS](#)[REGISTER YOUR FIP](#)[UPDATE YOUR FIP](#)[RESOURCES -](#)[FIP HELP](#)



# Different FIP approaches

- IFFO RS improver program
- ASEAN FIP protocol
- MSC fisheries-in-transition
- WWF 'comprehensive FIP'
- SFP-style FIP based on Fishsource profile

They are all good – it's the improvement that counts!

## SE Asia – some FIPs already

- Lower Mekong Kien Giang – see FIP Directory
- Lower Mekong Ben Tre – see FIP Directory
- Andaman Sea – in preparation (Thai Sustainable Fisheries Roundtable)
- Gulf of Thailand – in preparation (Thai Sustainable Fisheries Roundtable)

[www.fisheryimprovementprojects.org](http://www.fisheryimprovementprojects.org)

# SE Asia fisheries need many more FIPs

How can we achieve this?

# The SE Asia Sustainable Fishmeal Roundtable

# SE Asia Sustainable Fishmeal Roundtable

- Open to aquaculture feed companies operating in SE Asia as well as processors and retailers
- Specifically aimed at generating more FIPs in the region
- Works through convening key stakeholders in the supply chain to support existing FIPs, encourage new FIPs

# Role of roundtable participants

- Adopt procurement policies that support FIPs
- Support FIPs through preferential sourcing
- Give public support to FIPs and join industry colleagues in communicating that support to the supply chain
- Participate in FIPs that are important parts of a participants supply chain

# Next meetings

- Here! Today! 5 pm – 7 pm in Board Room 1
- IFFO annual meeting in Bangkok, Monday 24<sup>th</sup> October

More info on reduction fisheries and FIPs at:

[www.sustainablefish.org](http://www.sustainablefish.org)