

FINAL REPORT (DEVELOPMENT AWARD)

AWARD CODE and TITLE

2008/328.13 2010 FRDC Visiting Expert Bursaries - Workshop by Phil MacMullen, Sea Fish Industry Authority, regarding approaches to achieve successful engagement with environmental NGO's with respect to the seafood sustainability debate.

AWARD RECIPIENT: Phil MacMullen

ADDRESS: Sea Fish Industry Authority, Grimsby, UK

HOST ORGANISATION: Sydney Fish Market

DATE: 30 August 2011

ACTIVITY UNDERTAKEN

The host Sydney Fish Market (SFM), used the funds provided through this award to support a visit to Australia by Mr Phil MacMullen, head of environmental responsibility within the UK Sea Fish Industry Authority.

During his time within Australia, Mr MacMullen worked with SFM, Oceanwatch and SSA to deliver a workshop that highlighted the work he has undertaken with Seafish and the multi-stakeholder Sustainable Fishing Advisory Committee (SFAC) to encourage positive dialogue amongst key fishery stakeholders in the United Kingdom.

Participants at the workshop included fishing industry peak bodies, government fishery management agencies and selected environmental non-government organisations (NGOs). The workshop was part of the SSA Network meeting that was held in Sydney in May 2011. Other speakers were Professor Bob Kearney, Grahame Turk and Duncan Leadbitter.

Prior to the workshop, Mr MacMullen spent time with selected NSW fishing industry associations to discuss his experiences and their potential application to the Australian situation. After the workshop he was hosted by FRDC in Canberra.

OUTCOMES ACHIEVED

Dr Patrick Hone (Executive Director FRDC) summed up that industry has a great message and the workshop was about 'how'. We need dialogue to progress things with industry embracing partnership responsibility. Need to get a common language forum established with consensus approaches. It is beholden on industry to get their act together to attain get minimum agreement. PH believes all industry needs to contribute to this process. Industry organisations need to discuss with their members and come back with a plan including funding.

He noted that SSA funding stops on 30 June 2012. Patrick thanked the panel members for participation.

Overview of main speakers' points:

- language and terminology;
- develop effective alliances within and between stakeholders – willingness to work with industry is main mechanism for change. Transparency in engagement.
- Work across supply chain;
- Secure resourcing / funding
- Take ownership / responsibility
- Ensure information – trusted sources – open and transparent.

Grahame Turk expressed appreciation to FRDC for the bursary, and to SSA for organising, Philip MacMullen for the trek and Mark Boulter for the initial idea. Challenge is for SSA to continue the role of coordinating and “getting the gaggle together”. This will continue at Seafood Directions 23-25 October at Gold Coast www.seafooddirections2011.com.au

Acknowledgments

SFM and Phil Macmullan would like to acknowledge the following who assisted in this trip;

FRDC - Patrick Hone, Peter Horvat, John Wilson and Crispian Ashby.

SSA – Ted Loveday

Oceanwatch - Brad Warren

John Harrison (CEO Professional Fishermen's Association), Shane Geary & Coff's Harbour Fishermen's Cooperative Board

Wallis Lake Co-op members (including Deputy Chairman Peter Ragno)

Graeme Byrnes

Duncan Leadbitter

John and Rhonda Farlow

Commercial Fishermen's Co-op; Ross Fidden (Chairman), Jim Drinkwater and Mark Phelps (directors).

Bob Kearney and Colin Buxton

Need

As the seafood sustainability debate in Australia moves forward, the dialog is increasingly not just between industry and government, but also with a range of marine conservation-focused NGOs. Industry needs positive dialog with these groups to build up trust and ultimately cooperation on sustainability issues.

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Fishers have often been blamed for much that is wrong with the marine environment. However fishers understand that fishing and conservation are natural bedfellows as their livelihood depends on sustaining the ocean ecosystem and the resources within.

The seafood industry therefore needs to highlight the long-term benefit of balancing the need for conservation against the need for food and other services. In the UK there is a broad seafood industry perspective that fishers must be recognised as an essential part of building a sustainable future for the marine environment.

Phil, has been working in this field for the UK seafood industry for the past 20 years. Initially engaging with environmentalists when the rest of the industry thought it was 'crazy' to do so. He successfully managed to bridge the gap between conservationists, industry and government and for the last 10 years has run the UK's sustainable fishing advisory group, which brings together industry, conservationists and government membership. It is felt that the seafood industry would greatly benefit and gain positive outcomes from the experience Phil has gained over the last 20 years. This is an opportunity to improve the communication, respect and cooperation between industry and conservationists that is so sorely needed.

Objectives

Undertake a workshop, to be coordinated by SFM and Oceanwatch (in conjunction with the SSA network meeting) with peak bodies, industry and fisheries management groups. This workshop will provide industry with a mechanism to develop strategies and techniques to encourage positive dialogue about seafood sustainability between Industry, Government and NGO's

Methods

Phil MacMullan will deliver a workshop facilitated by SFM and Oceanwatch with peak bodies from industry and government fisheries management agencies to discuss the work he has undertaken with Seafish and the multi-stakeholder Sustainable Fishing Advisory Committee (SFAC) in which he is involved.

The workshop was held in conjunction with the May SSA Network meeting held in Sydney. What was undertaken was a full day workshop as part of the SSA network meeting to ensure maximum peak body participation. Other invited speakers were; Prof. Bob Kearney, Duncan Leadbitter and Grahame Turk.

Results / Discussion

Phil MacMullan's report on the trip follows;

Notes on a visit to Australia, 11th - 21st May 2011

1. Introduction

On an initiative from Sydney Fish Market, FRDC generously funded a visit to Australia in order for me to attend a series of meetings in New South Wales. This note summarises those meetings and their outcomes, ending up with a Seafood Services Australia seminar in Sydney and visits to FRDC and AFMA in Canberra.

My thanks to all those who facilitated the trip and those who generously gave their time and expertise.

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2. Background

I undertook a study tour of Australia and New Zealand in October 2000. My aim then was to look at local and co-management arrangements, relations with environmental non-government organisations (ENGOS), criteria for and documentation of the sustainability bona fides of seafood and general provisions for marine environmental management.

In the following ten years Seafish has had a significant influence in these policy areas. We have initiated a very successful Responsible Fishing Scheme which has now audited and accredited over 50% of the UK fleet by capacity and which is still growing. It is increasingly being used as a vehicle for increasing standards in the catching sector, effectively enlarging the total 'quality envelope'. It also enables market signals to be incorporated into buying specifications - for example gear specifications, operating practices and discard reduction targets. For details see: <http://www.seafish.org/media/sustainability/the-responsible-fishing-scheme>.

Seafish has also established a supply chain-focused 'Common Language Group' (CLG) that includes all seafood industry stakeholders, those ENGOS that want to engage and be accountable, departments of government and European organisations. A description of the CLG, meeting minutes, etc can be found at: <http://www.seafish.org/foodservice/responsible-sourcing/the-common-language-group>.

The CLG has generated a number of other issue forums such as the Discard Action Group and has also initiated, and endorses, a series of Responsible Sourcing Guides: <http://www.seafish.org/foodservice/responsible-sourcing/responsible-sourcing-guides> and guides to issues that may be a source of friction between different interest groups: <http://www.seafish.org/media/sustainability>. All of this material is peer-reviewed and forms the basis for a consensus position for CLG members.

These initiatives were of interest to FRDC and formed the basis for much of the discussions held during my return visit in 2011.

3. Itinerary

After a day's stopover in Singapore and a night in Sydney I flew to Coff's Harbour. There I met Brad Warren (Exec. Chair of OceanWatch) who was to accompany me for three days.

Thursday 12th May

Met John Harrison (CEO Professional Fishermen's Association), Shane Geary & Coff's Harbour Fishermen's Cooperative Board. We discussed and compared Australian and UK experiences with MPA designation, monitoring and compliance systems, and fisheries certification schemes (see refs and URLs). We also discussed the resource management, marketing and logistics systems. I later had dinner with some of the Board and we continued our discussions.

Friday 13th May

Drove to Wallis Lake via a nearby beach where local Co-op members (including Deputy Chairman Peter Ragno) were beach-seining, then to Pacific Palms. Met up with Graeme

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Byrnes and Duncan Leadbitter for general discussions of the fisheries and MPA developments which continued through dinner where we were joined by John and Rhonda Farlow.

Saturday 14th May

A short tour of the lakes on Graeme Byrne's boat then to Newcastle. Viewed most of the boats working from there and then met with the Commercial Fishermen's Co-op; Ross Fidden (Chairman), Jim Drinkwater and Mark Phelps (directors). Discussed similar topics as before focusing on diminishing fishing opportunities, the problems for co-ops of maintaining viability and the increasing impact of MPAs.

Sunday 15th May

Travelled to Sydney with Mark Boulter visiting various places en route and discussing supply chain issues.

Monday 16th May

Discussions at Sydney Fish Market (SFM) with Bryan Skepper, Nigel Cox, Mark Boulter, Jessica Harding, Louise Shaw, Grahame Turk and Sally Fraser (Cox Inall) focusing on communications strategies and relations with accreditation bodies and ENGOs.

Tues 17th May

Further discussions at SFM with Bob Kearney, Bryan Skepper, Grahame Turk, Patrick Hone, Peter Horvat, Colin Buxton and Louise Shaw, this time focusing on sustainable fisheries science

Evening: SSA Network Meeting Dinner

Wed 18th May

The SSA Network Meeting at Sydney Fish Market involved a presentation from me (among others) describing the Sea Fish Industry Authority (Seafish) and our work on consensus-building in the UK seafood supply chain. This has involved the creation and servicing of a forum known as the Common Language Group. The report on this meeting is appended to these notes and my presentation was placed on the SSA website. Much of the discussion related to the need to manage relations between industry and ENGOs, the lack of an effective Commonwealth peak body for industry, and the need to take an inclusive, supply chain-focused approach to 'sustainability' issues and build consensus with other stakeholders.

Thurs 19th May

Flew to Canberra and had an initial meeting and dinner with Patrick Hone, Peter Horvat, John Wilson and Crispian Ashby.

Fri 20th May

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On this final day I gave a presentation to AFMA staff and concluded discussions with FRDC. These covered a range of issues including the roles and responsibilities of Seafish, the mechanics of levy funding and co-operative research.

Return to Sydney

Sat 21st May

Departed Sydney 1015hrs

4. Observations during the visit

From the short time I was able to observe the status quo a few points stand out. These relate both to my previous visit and to more general differences between the seafood industries in the UK and Australia:

- Size matters! The scale of the Australian land mass and the Commonwealth structure make it important that there is a Commonwealth-wide peak body representing the seafood industry. This is particularly significant given the relatively narrow coastal strip under state/territory control and the large area of Commonwealth waters.
- Dialogue and consensus-building is a continuous process; it has no specific end-point even if one seems to have been reached. Issues relating to marine environmental management are constantly changing as new stakeholders emerge along with new sources of funding. An unwillingness to engage in dialogue tends to lead to an increasing polarisation of attitudes.
- These points lead to an intrinsic weakness in the fishing industry's position in respect of the designation of the Commonwealth MPA network. It is vulnerable strategically and on specific issues such as the impacts of towed gears.
- There also appears to be a lack of 'supply-chain coherence' in the ways in which the seafood industry approaches its challenges. Harnessing the synergies that a supply-chain approach offers would likely produce many more long-term benefits than flow from the current lack of connectedness.

5. Conclusions

The change in industry confidence compared to only a few years ago was quite marked to me. Some possible causes are suggested above. Militating against a resolution of these difficulties is an inability to identify common cause across the nation, failure to make a commitment to a common strategy and the need to step up to the plate and contribute to funding the structures that can effect change. But, internationally, Australia enjoys plenty of good company in these respects!

The contrast is obvious between businesses that have to accommodate external challenges as well as getting on with the day job, and the highly networked and committed campaigning organisations. The latter, of course, have the luxury of being able to focus exclusively on quite clear objectives. Funding is usually available to cover most activities and a healthy membership list can demonstrate the organisations' significance in a democratic system. In politics, fishing and the marine environment generally present easy wins in demonstrating conservation credentials.

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Whilst the situation in the UK is certainly not perfect, Seafish, as a statutory, levy-funded body has the resources and perspective to provide pan-industry support. The success of the Common Language Group is based on building consensus amongst a range of stakeholders. It seems that starting this dialogue in Australia could be a good first step towards regaining confidence, influence and the key relationships between producers and their markets.

PHM 15.6.2011

See also the 3 presentations by Phil Macmullan, Grahame Turk and Duncan Leadbitter in Appendix 1 and minutes of the workshop from SSA

Benefits and Adoption

The workshop provided peak industry groups with better engagement strategies to communicate with government and conservation bodies to build trust and ultimately cooperation in the field of marine conservation. This will assist in developing relationships with community and NGO groups that will prove invaluable to the seafood industry.

The challenge is for SSA to continue the role of coordinating. This will continue at Seafood Directions 23-25 October at Gold Coast www.seafooddirections2011.com.au .

Further Development

This falls into the remit now of SSA and FRDC to coordinate.

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Appendix 1.

Powerpoint presentation from Phil Macmullan, Grahame Turk and Duncan Leadbitter are attached.

Also the minutes of the workshop by SSA.

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Rebuilding public support for commercial fishing in NSW: not so simple, not so hard

Duncan Leadbitter
Director
Fish Matter Pty Ltd



Quick overview

Project Terms of Reference

Is public perception an issue, and why?

What's changed and why?

Key elements for building community support

A strategy for moving forward



Is public perception an issue, and why?

The operating model

Fish are public resources, therefore public opinion counts when it comes to allowing access to those resources

Seafood consumers, who are also voters, need to have confidence that commercial fisheries are not damaging public resources



Tests of public opinion

Very limited and sporadic – various surveys over the years. Some useful information from other primary industries and more general public

~~Attitude surveys~~ Although the exact figures may vary, some people don't care about sustainable fisheries, some do and some are quite clearly motivated enough to act in some way – write letters/emails to Ministers, seek independent advice on what to buy, ask retailers questions about sustainability and send feedback via blogs, Facebook etc regarding species being sold.



What has changed and why?

General concern about the environment has grown over the past few decades. On a year by year basis it may change

People have greater access to information and want more information than at any other time

In the 1990's people lost faith in resource management agencies – separation of regulator and operator became government policy



The access question

Access to fish resources by the commercial sector is constrained for a variety of reasons – resource management, allocation and habitat/pollution

Access is constrained via time and area closures, gear restrictions, gear bans, species bans etc



For the NSW commercial sector

Access restrictions and reallocations have been around for many years but have accelerated in recent years. Concern about impact on overall viability.

Industry voice has not been strong due to lack of organisation, unwillingness to allocate funds to the issues, inability to engage customers beyond traditional factors, inability to make information available to interested parties in accessible ways and an inability to form strategic alliances

Efforts to engage customers (voters) have been sporadic in time and space, and disconnected.
Lots of missed (and cheap) opportunities



A strategy for moving forward

Main elements of interest are:

- Creating and maintaining networks
- Ensuring that information is up to date and accessible
- Transparency and openness – engaging people
- Credibility – avoiding greenwash
- Capitalising on success

Key Result Area 1 – the existing committed groups have built supportive relationships with stakeholders

- Objective 1 – Existing committed groups within the wider industry have convinced other groups that maintaining resource access is fundamental to the future of all those that deal in seafood.
- Objective 2 – The industry has developed relationships with key players in local communities
- Objective 3 – the industry has working relationships with NGOs and the recreational sector
- Objective 4 – the industry is viewed as a knowledgeable and credible source of advice on matters relating to the welfare of the industry



Key Result Area 2 – ensuring that accurate, relevant and up-to-date information is easily accessible to interested parties

- Objective 5 – the industry has accurate, relevant and up-to-date information
- Objective 6 – stakeholders have easy access to information about the industry and fishery resources.



Key Result Area 3 – facilitating open and transparent communications

- Objective 7 – outreach style communications ensure that information is transmitted to stakeholder groups in a timely fashion
- Objective 8 – industry events are grown in number and used to facilitate relationships with the wider community.



Key Result Area 4 – establishing credibility

- Objective 9 – improve accountability on management improvement progress and focus more on performance reporting.



Key Result Area 5 – capitalising on success

- Objective 10 – industry has embarked on a transition to comanagement



Not so simple

- Maintaining and funding independent organisations
- Cultural transitions – acknowledging and working with the new norms
- Transparency and acting on management needs
- Collaboration and seeing the big picture
- Earning support not assuming it



Not so hard

- People love their seafood, it can carry messages
- A lot of information is available – needs to be made accessible and up to date
- Networking and relationship building costs very little. Commitment and patience are free
- Existing systems are underutilised



Questions?



www.fishmatter.com.au

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DEFENDING INDUSTRY SUSTAINABILITY

Grahame Turk
Managing Director
Sydney Fish Market Pty Ltd



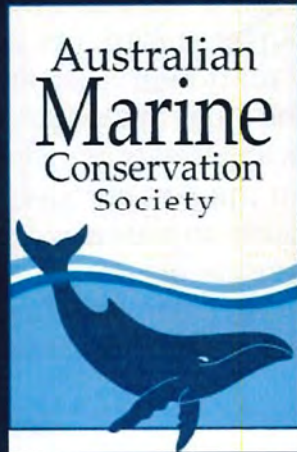
Definitions of Sustainability

“meets the needs of the present without compromising the ability of future generations to meet their own needs”

(UN The Brundtland Report 1987)

“resources that are managed so that the natural capital stock is non-declining through time, while production opportunities are maintained for the future”

(FAO Glossary Online)



MARKETING

Befuddled by seafood eco-labels

PHOTO: MSC

IntraFish.com

A new survey shows confusion over eco-labels remains the major obstacle to purchasing sustainable seafood.

The survey, carried out in the United Kingdom, shows that while 70 percent of people agree buying sustainable fish is important, only 30 percent said they actually buy sustainable items.

Awareness also remains an issue. The survey -- which focused only on the Marine Stewardship Council (MSC) eco-label program -- shows as many as 37 percent of respondents were not aware of the MSC.

"Seven in every 10 people say that buying sustainable fish is important, but only 30 percent say that they buy sustainable fish, because a third of people aren't sure how to choose sustainable fish products and are confused by labeling," said the U.K. Department of Environment, Food and

A new survey shows confusion over eco-labels remains the major obstacle to purchasing sustainable seafood.

"The figures show the need for retailers and producers to make sure labels are clear and effective."

70% of people agree buying sustainable seafood is important, but only 30% said they actually buy sustainable items.

cent of households rated healthy foods as the most important factor affecting their buying decisions.

According to the survey, the

... a third of people aren't sure how to choose sustainable fish products and are confused by labelling.

and habit (2... ercent).

ALL MEAN: Survey after survey shows consumers just don't quite understand what eco-labels are trying to say to them.

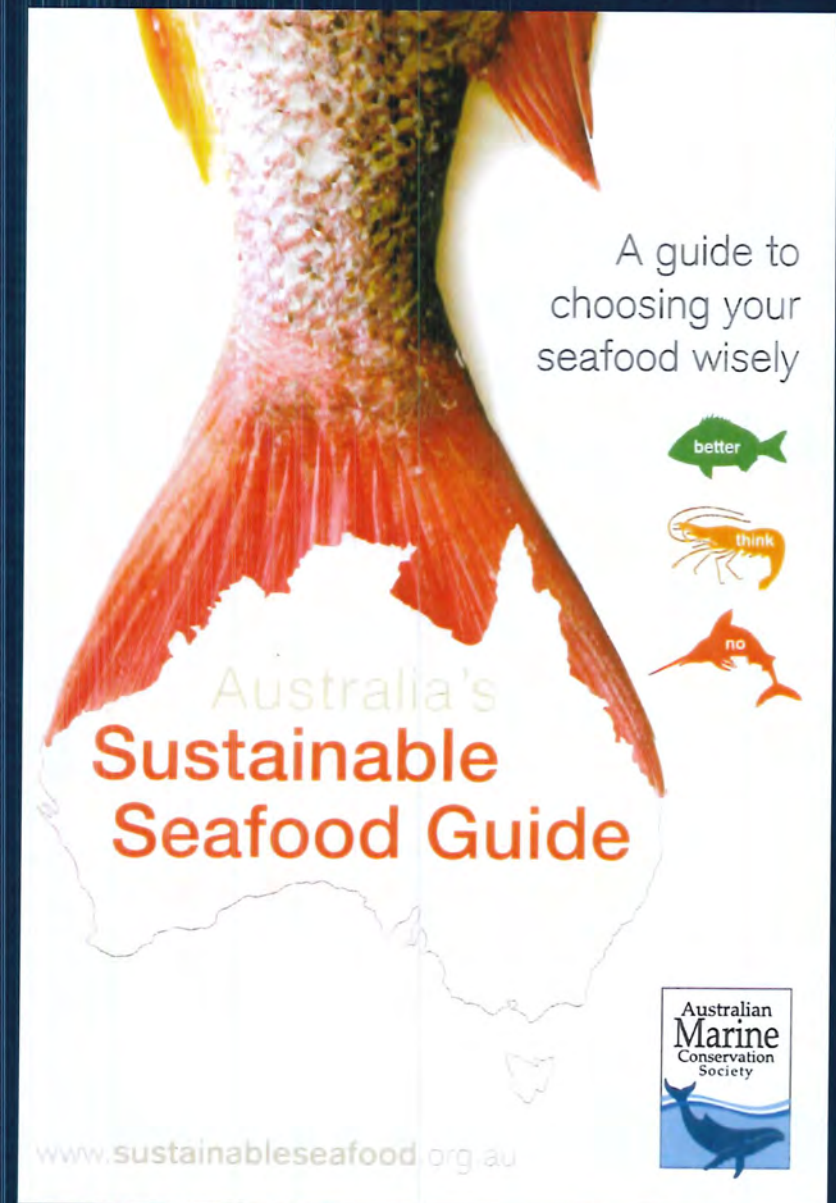


New Zealand Hoki

- Has been certified as sustainable by Marine Stewardship Council.
- Greenpeace has red listed it:
“in spite of being certified as sustainable under the international Marine Stewardship Council, this fishery has one of the severest ecological impacts of any New Zealand Fisheries” (Greenpeace New Zealand)

**“Also avoid unsustainable sea cage
aquaculture, e.g. sea cage-
grown Atlantic
salmon, yellowtail kingfish,
barramundi”.**

(AMCS Sustainable Seafood Guide)



The Greenpeace logo, consisting of the word "GREENPEACE" in white, bold, sans-serif capital letters, centered within a solid green rectangular background.

GREENPEACE

“...the serious environmental and social impacts that have resulted from the development and practice of aquaculture.....”.

“... last year we removed Orange Roughy from all our stores in response to concerns about the sustainability of the fish.”

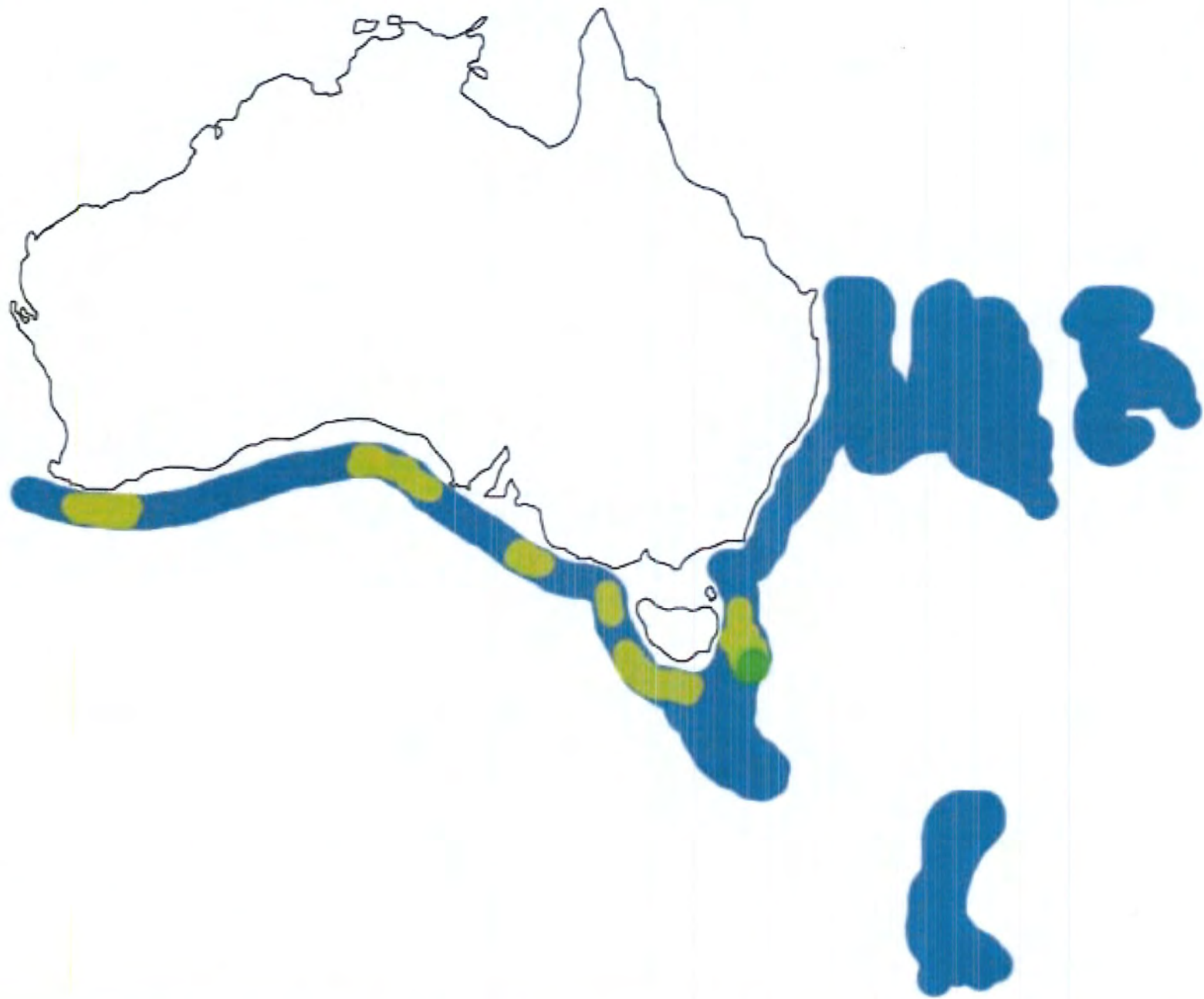
“safeguarding vulnerable fish stocks now ...”

“Our oceans are being seriously over fished. Unless we take action, some of our favourite seafood may disappear from the seafood counter altogether”

Coles media release, 17.03.11

“Following advice from fisheries experts, Woolworths has delisted Yellowfin Tuna and Orange Roughy from all Woolworths stores, to ease pressure on the species”.

Woolworths media release, 17.03.11





PRODUCT OF AUSTRALIA[®]

SFM's marketing initiatives to address public perception of the seafood industry:

- Aussie Seafood Campaign
- Get Fresh with Fish
- Support of OceanWatch Australia and their efforts of habitat restoration and by-catch reduction
- For the Love of Seafood Festival (including Blessing of the Fleet)
- Seafood Excellence Awards
- Behind the Scenes Auction Tours
- Facebook and Twitter
- 'Sustainable Seafood' leaflet



Grahame Turk
Managing Director
Sydney Fish Market Pty Ltd

May 2011

www.sydneyfishmarket.com.au



SEAFISH

the authority on seafood

thank you

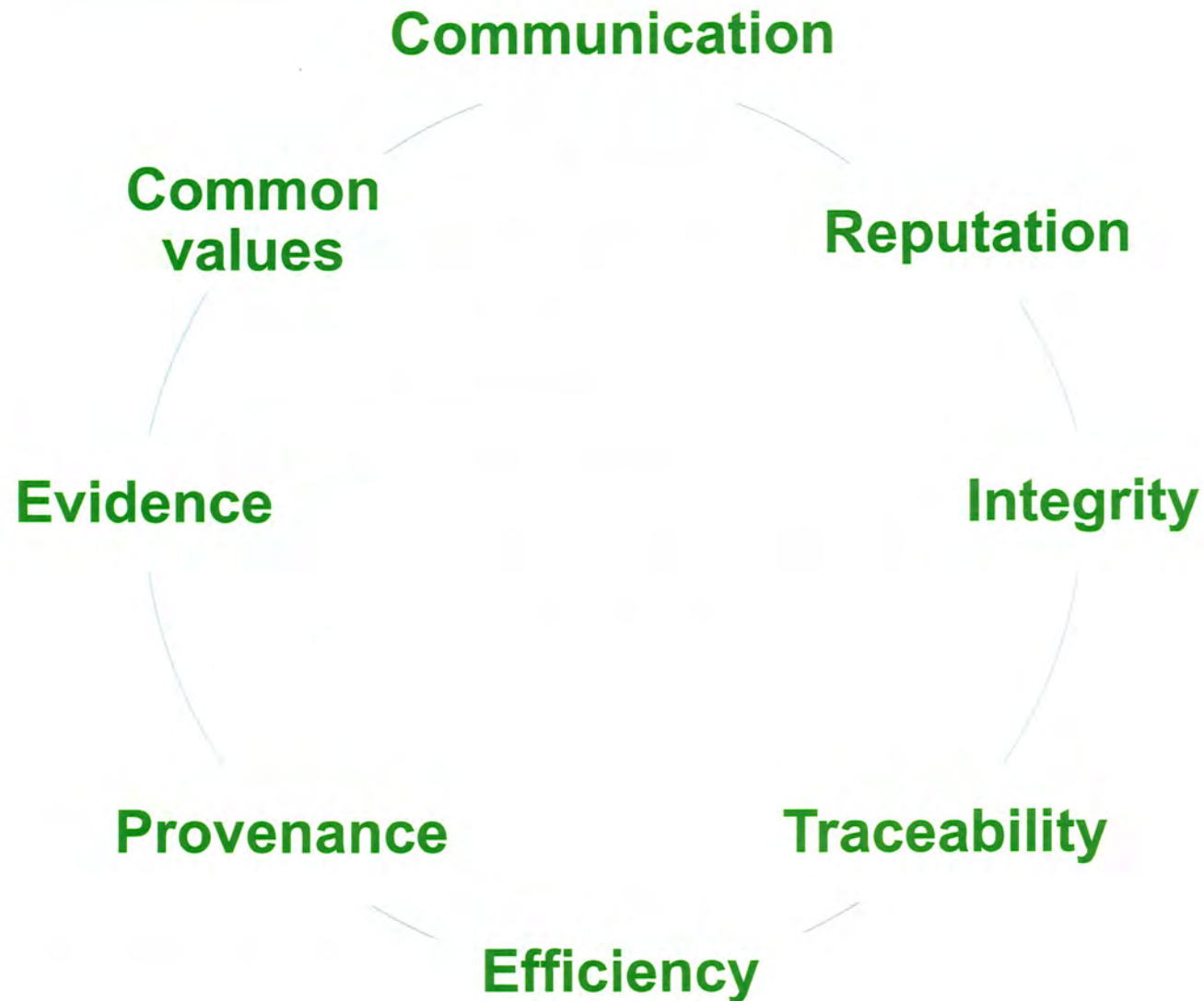
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The 'S' Word



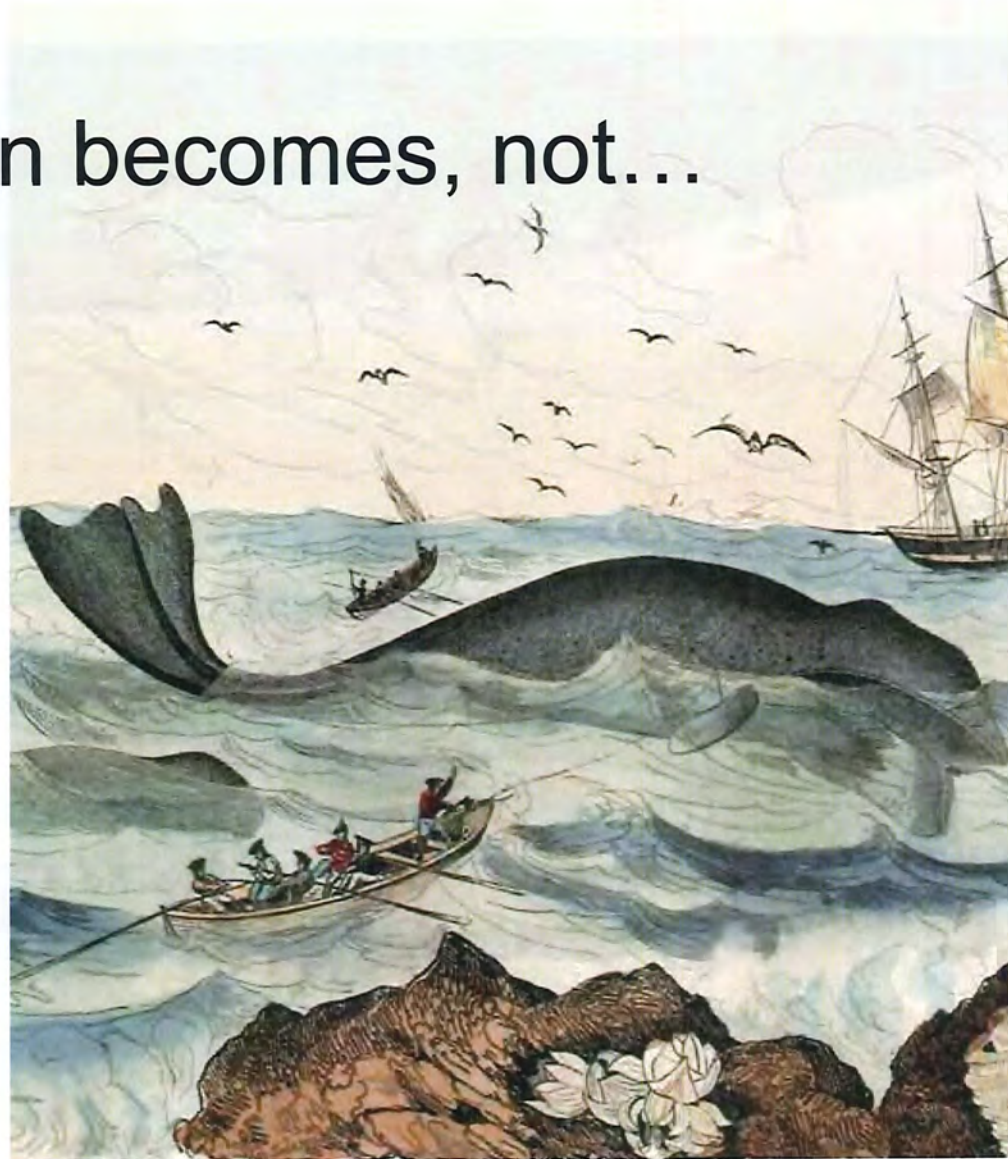
but...a 're-branded' industry

- 'givers', not just 'takers'
- accepting monitoring
- providing 100% compliance
- monitoring activity
- monitoring status
- generating data
- becoming co-managers
- learning to live together

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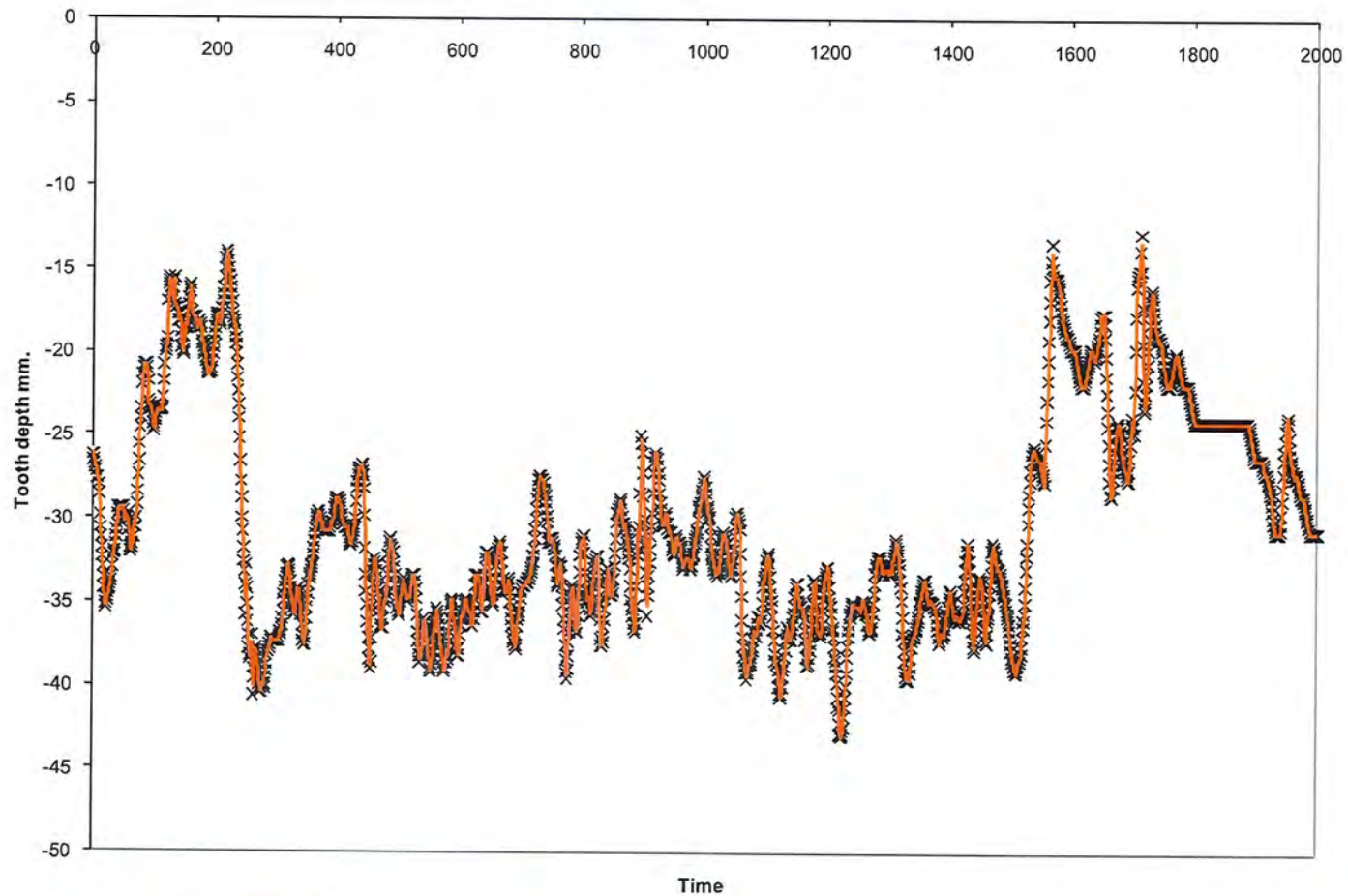
the vision becomes, not...



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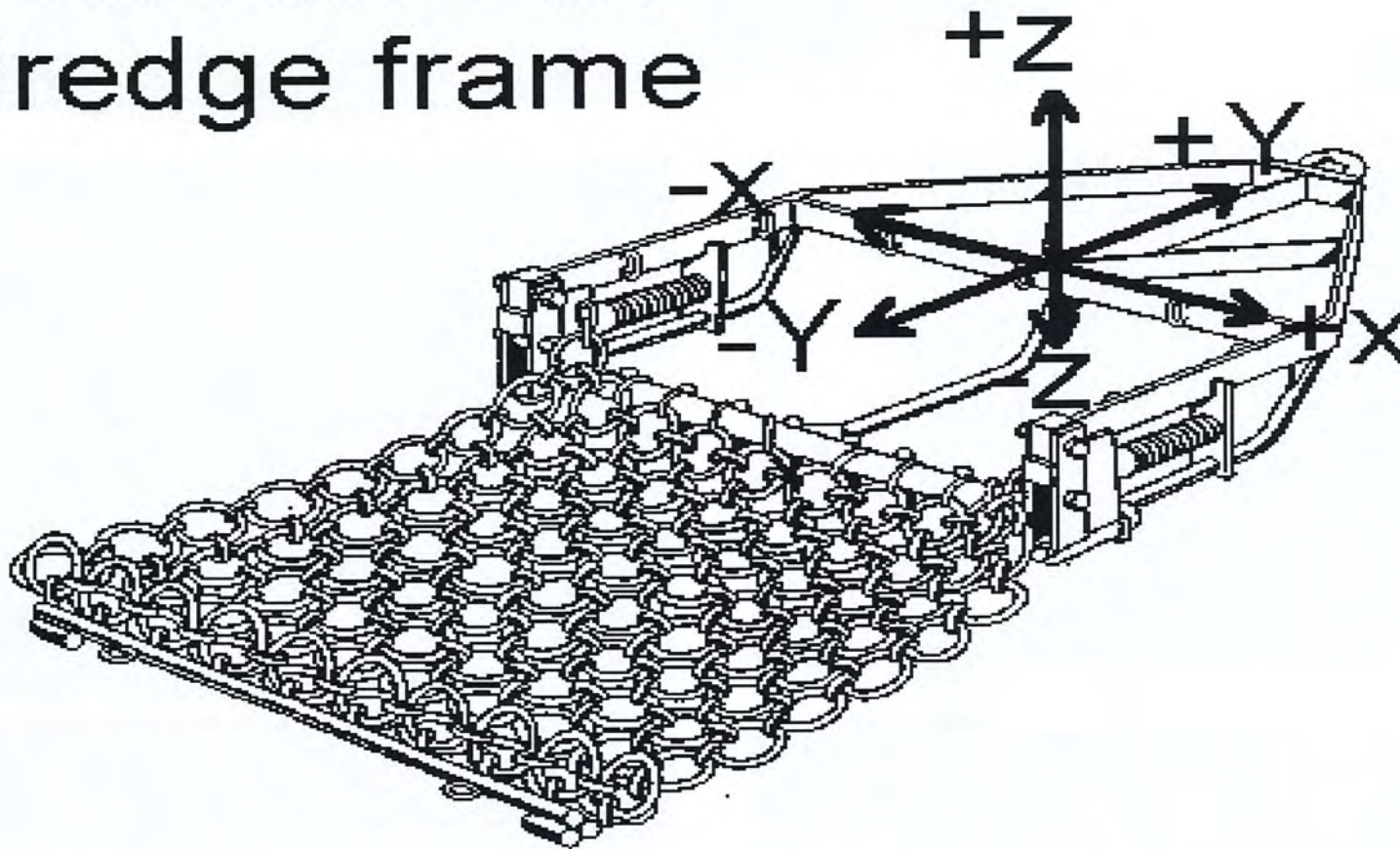
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Tooth depth



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XYZ axis on dredge frame



Engineering studies of dredges



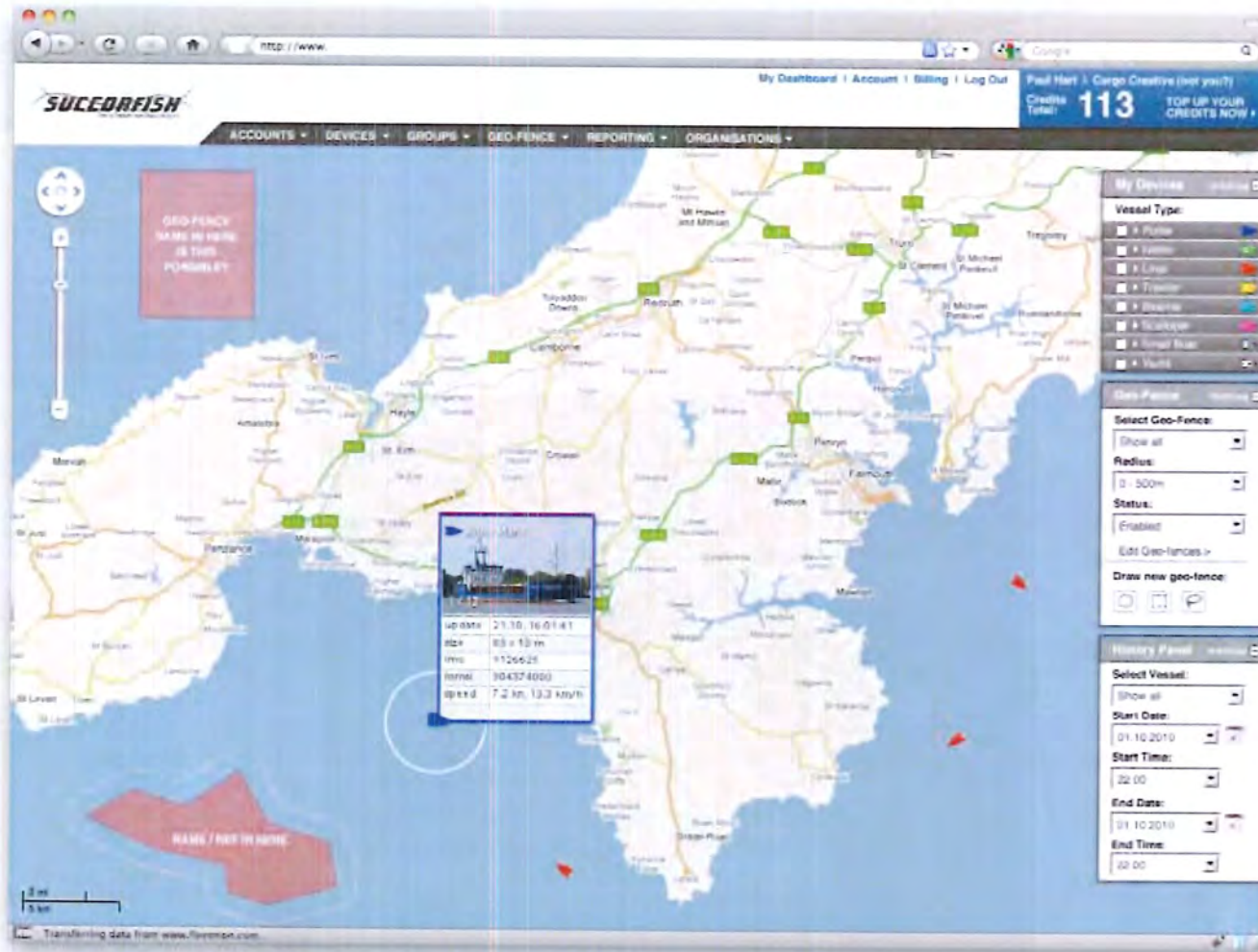
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Impacts of trawling and scallop dredging on benthic habitats and communities



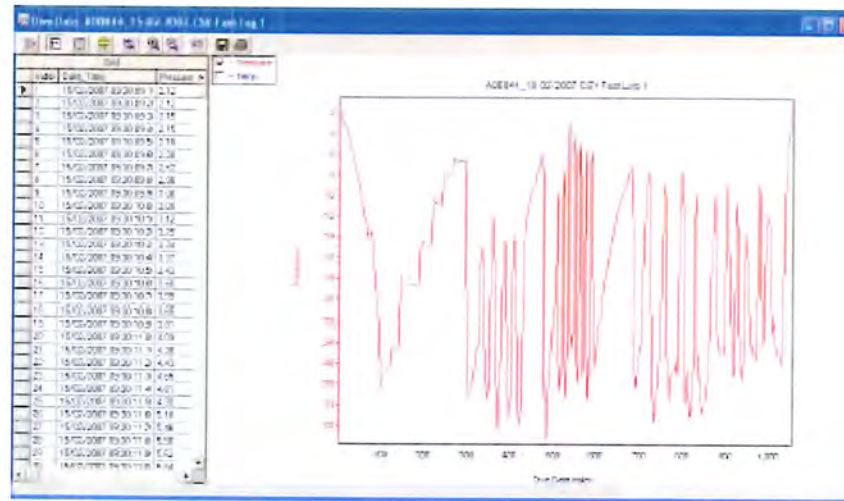
View vessel details, operational status & restricted areas...



Increased 'ping' rates for greater resolution



Data Storage Tag (DST) in protective housing attached to fishing gear



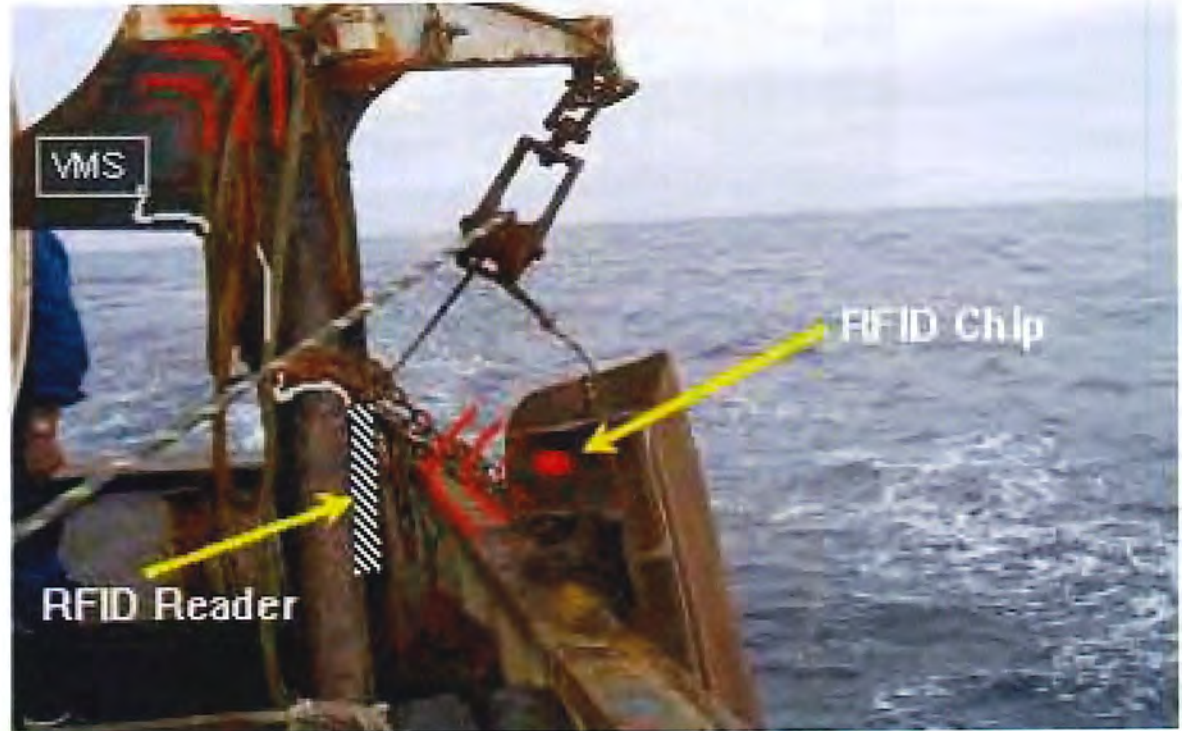
to record gear depth, temperature, salinity, DO₂ (?)
.....plus total catch monitoring via CCTV

supporting the seafood industry for a sustainable, profitable future

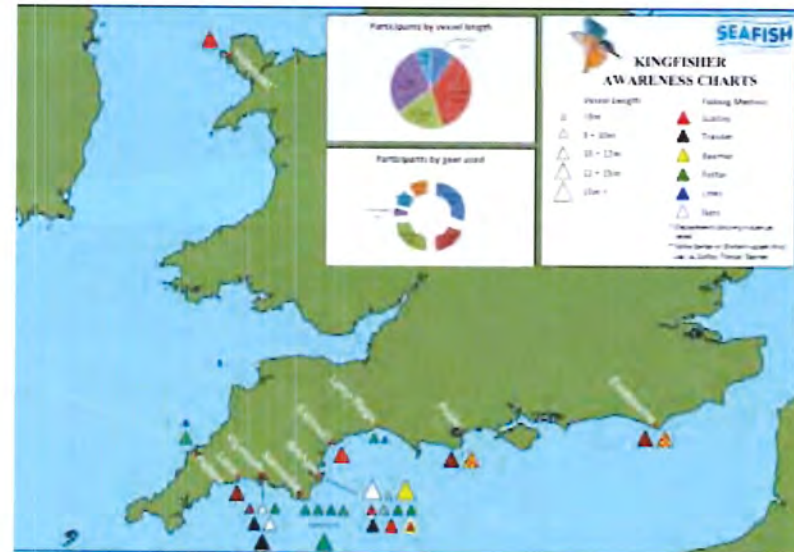
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We have the technology!

Fishing? Any gear in the water? How much gear? Who's gear? Permitted gear? For how long? Steaming?



VMS trials



(project images, courtesy Defra)

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The Lizard Point cSAC is graded I (excellent prospects).

Restoration possibilities

The reef habitats of the Lizard Point site have not been demonstrated to be damaged. As the sites has been graded I for both the conservation of structure and the conservation of function sub-criteria, there is no formal requirement to assess the restoration possibilities.

Overall

The overall grade for the conservation of structure and function criterion is grade A (excellent conservation value)

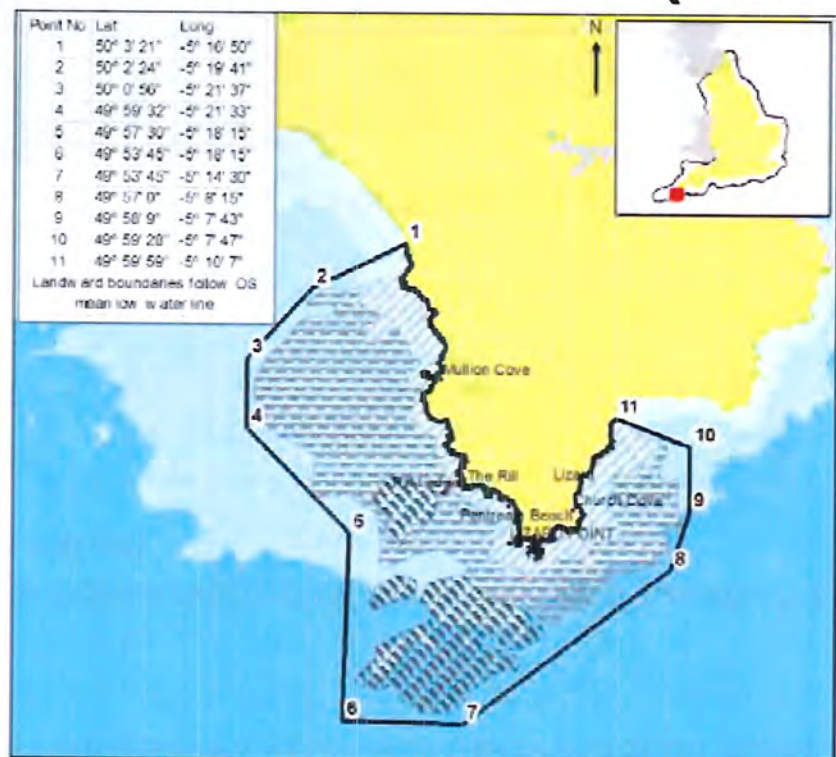


(Natural England status assessment, pub 11/2009)



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The Lizard candidate SAC (cSAC)



candidate Special Area of Conservation

Lizard Point

Special Areas of Conservation

candidate Special Area of Conservation

England 12nM Territorial Seas Limit

Annex I reefs

Flat Reef

Coastal Upstanding reef

Offshore Upstanding Reef

Depth Areas

Depth Area

EU Site Code

UK0000110

OS Grid Reference

11

Longitude

5° 16' 31" W

Latitude

49° 59' 32" N

Projection

UTM Zone (WGS84)

18Q UTM Zone

1086755 m

Thema ID

1453106

Land Use

07000100

Volume

9.0

Method

2007/2010

Proj ID

11

Area of Site

136.86 sq km

1086755 m

Scale 1:200,000 Map 1 of 1

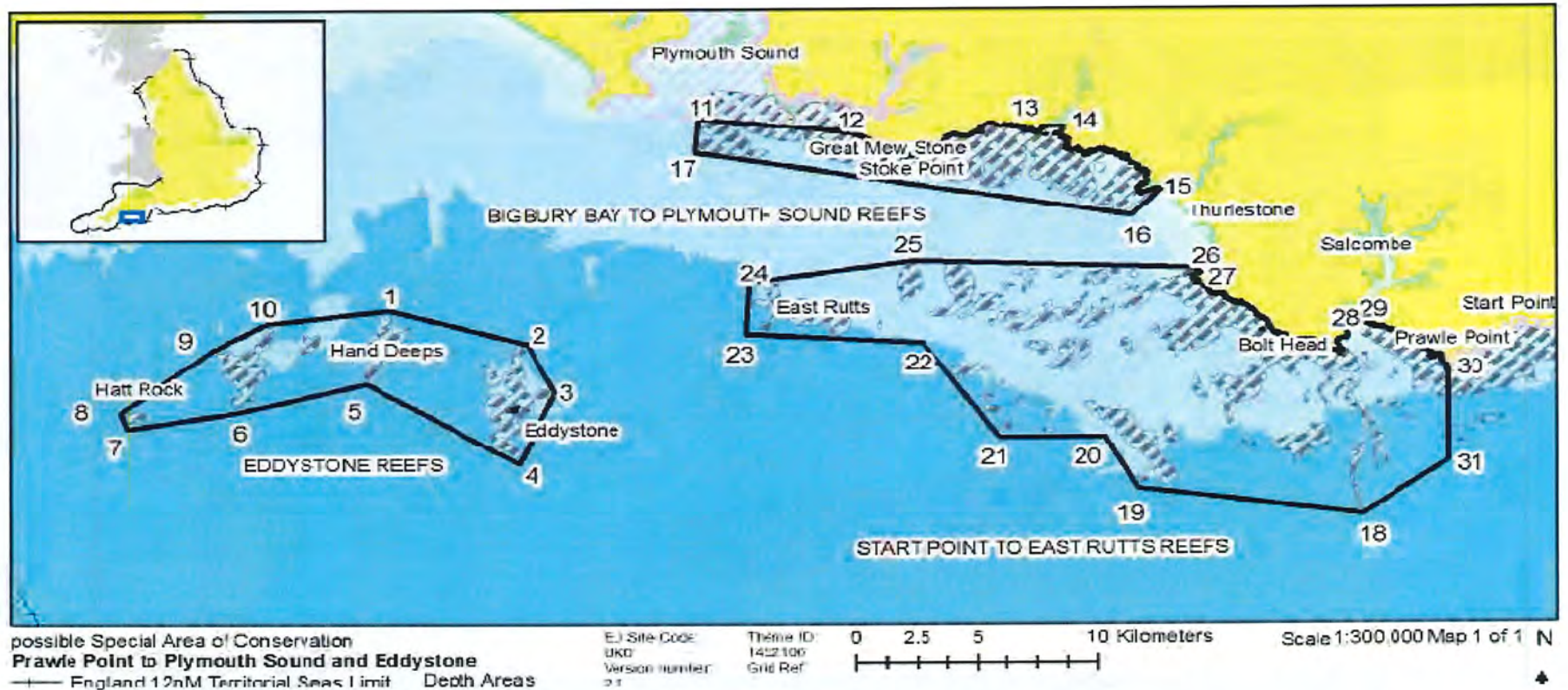
0 1.25 2.5 5 kilometers

Candidate Special Area of Conservation Directive 92/43/EEC
Submitted to the EC by the Secretary of State for Environment
Food and Rural Affairs. Date: 20/08/2010
Depth areas © British Crown and SeaZone Solutions Limited

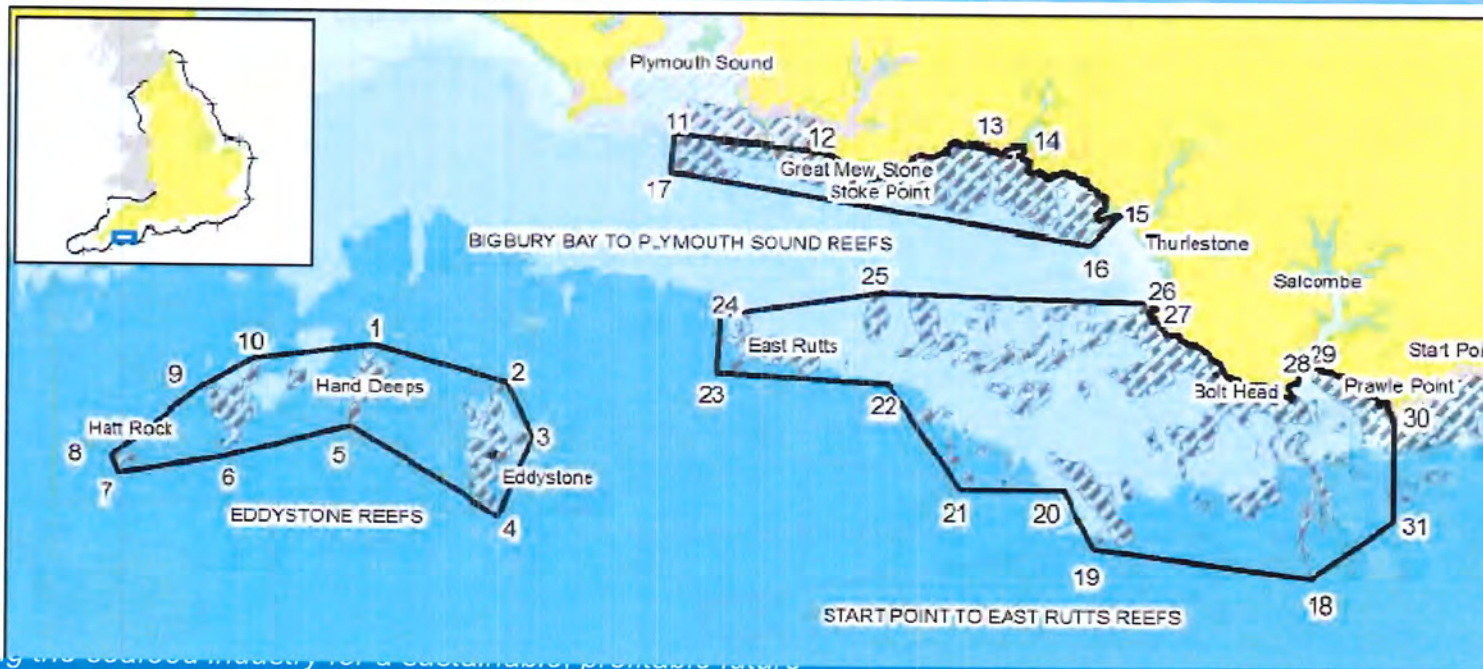
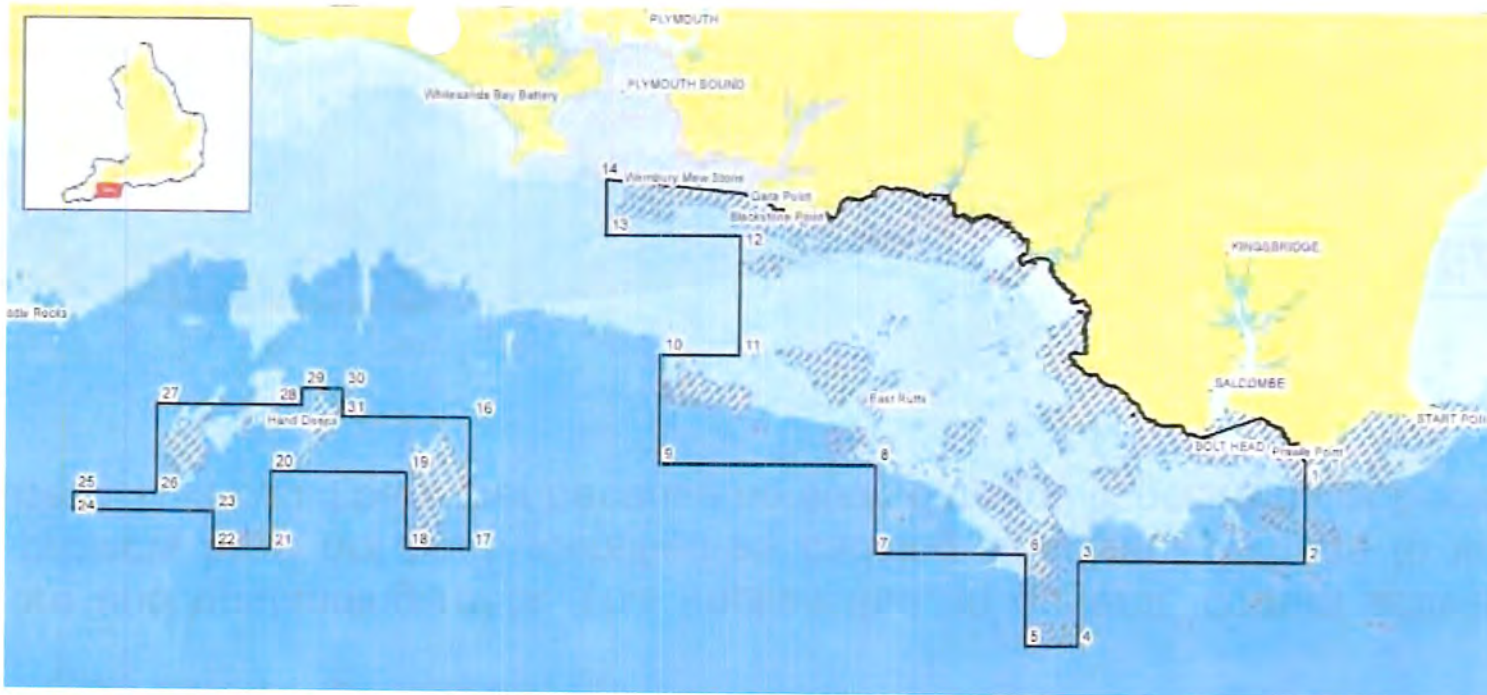
(Natural England status assessment, pub 11/2009)

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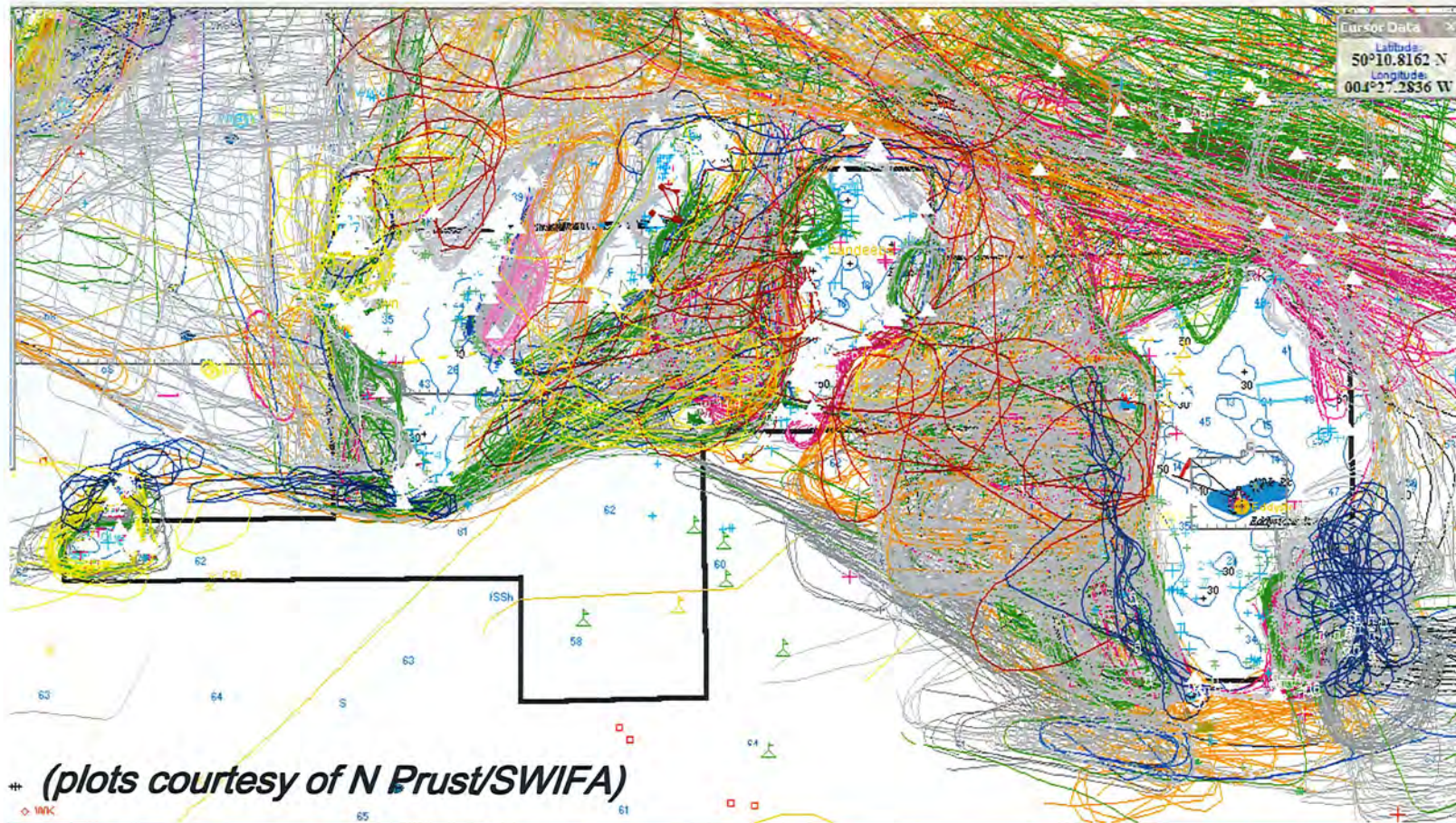


inshore and upstanding reefs. This implies that, in general, current activities, plans and projects have not been identified as causing significant damage to the interest features. This could be either because no such damage is occurring or because there

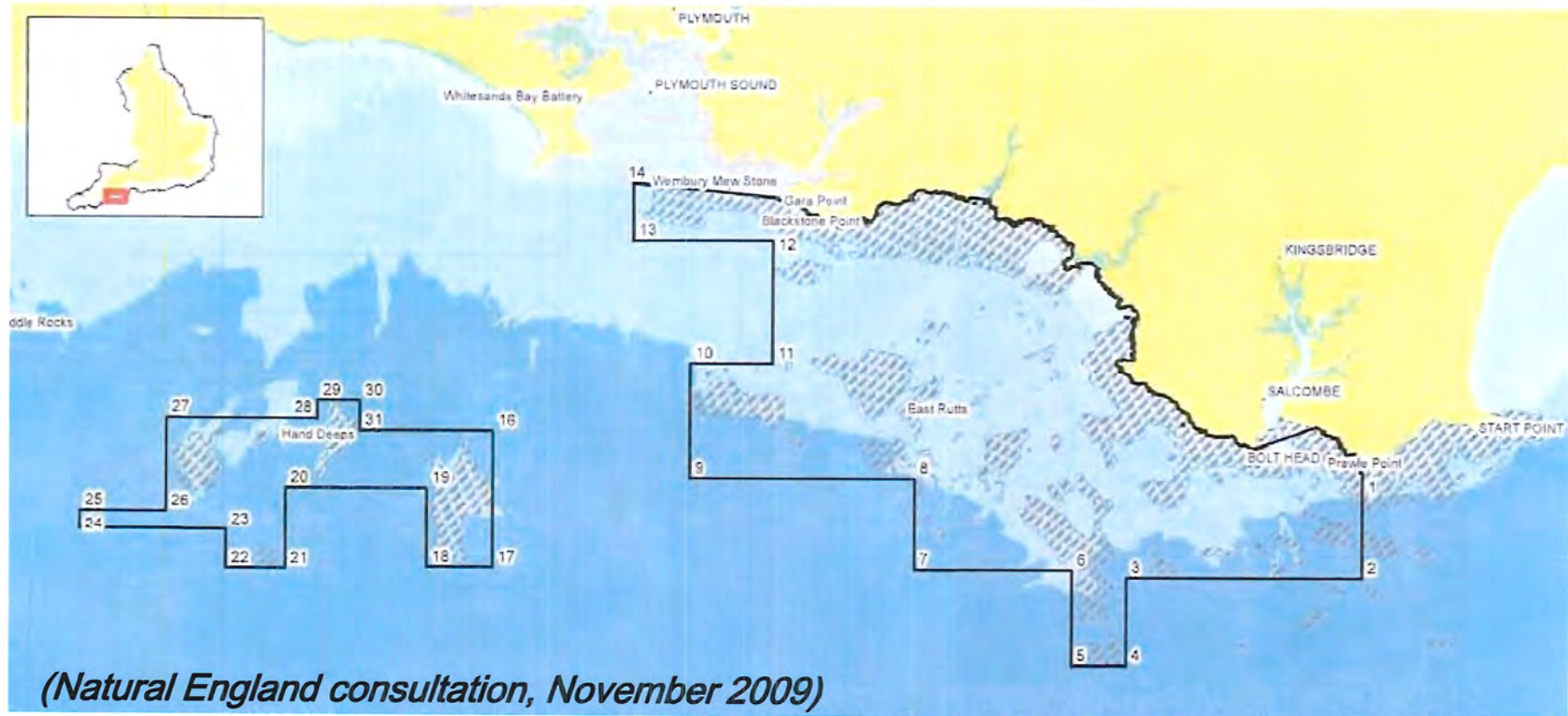


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Aggregated track plotter data



Eddystone to Prawle Point possible SAC (pSAC)



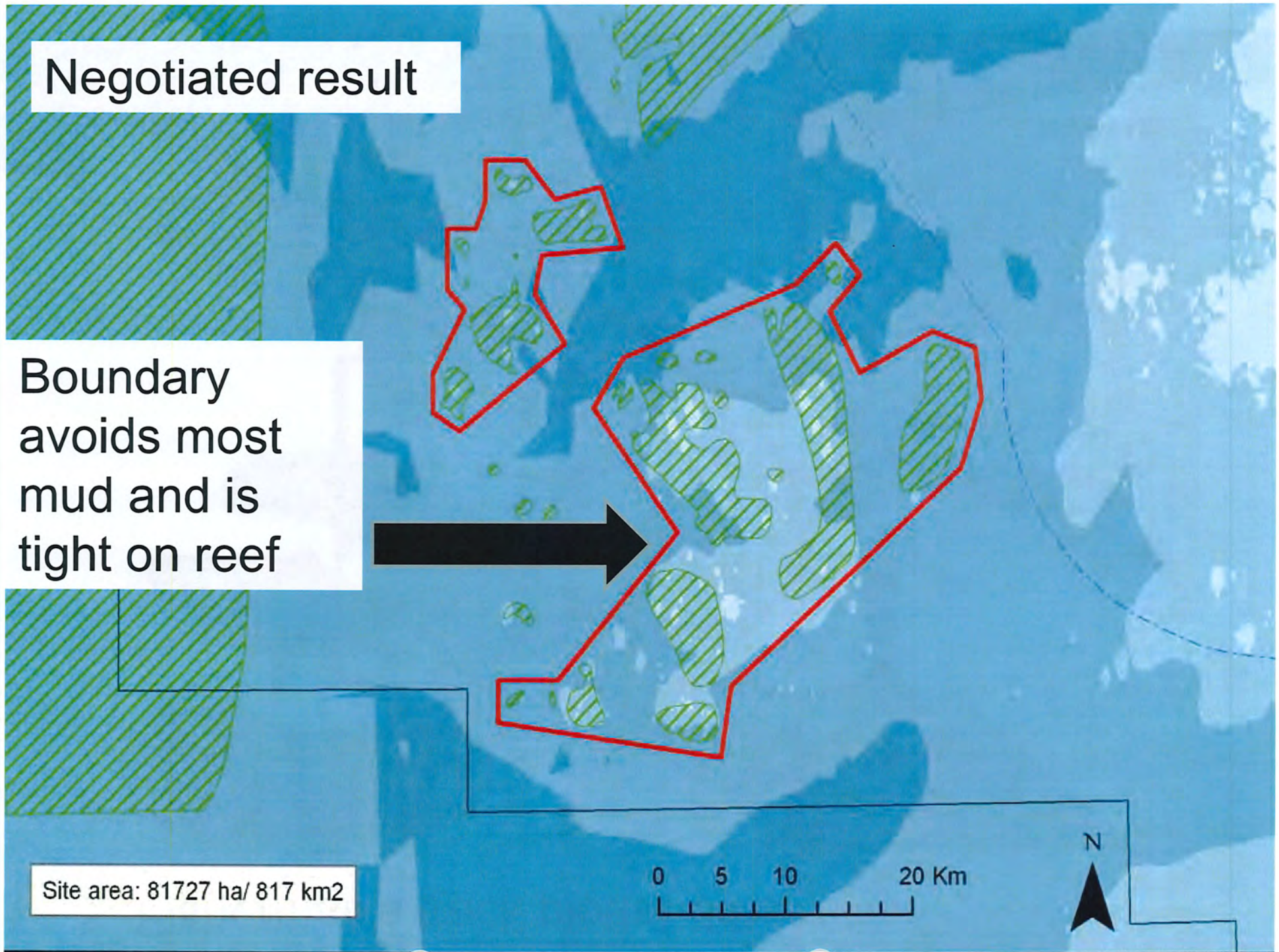
Negotiated result

Boundary avoids most mud and is tight on reef

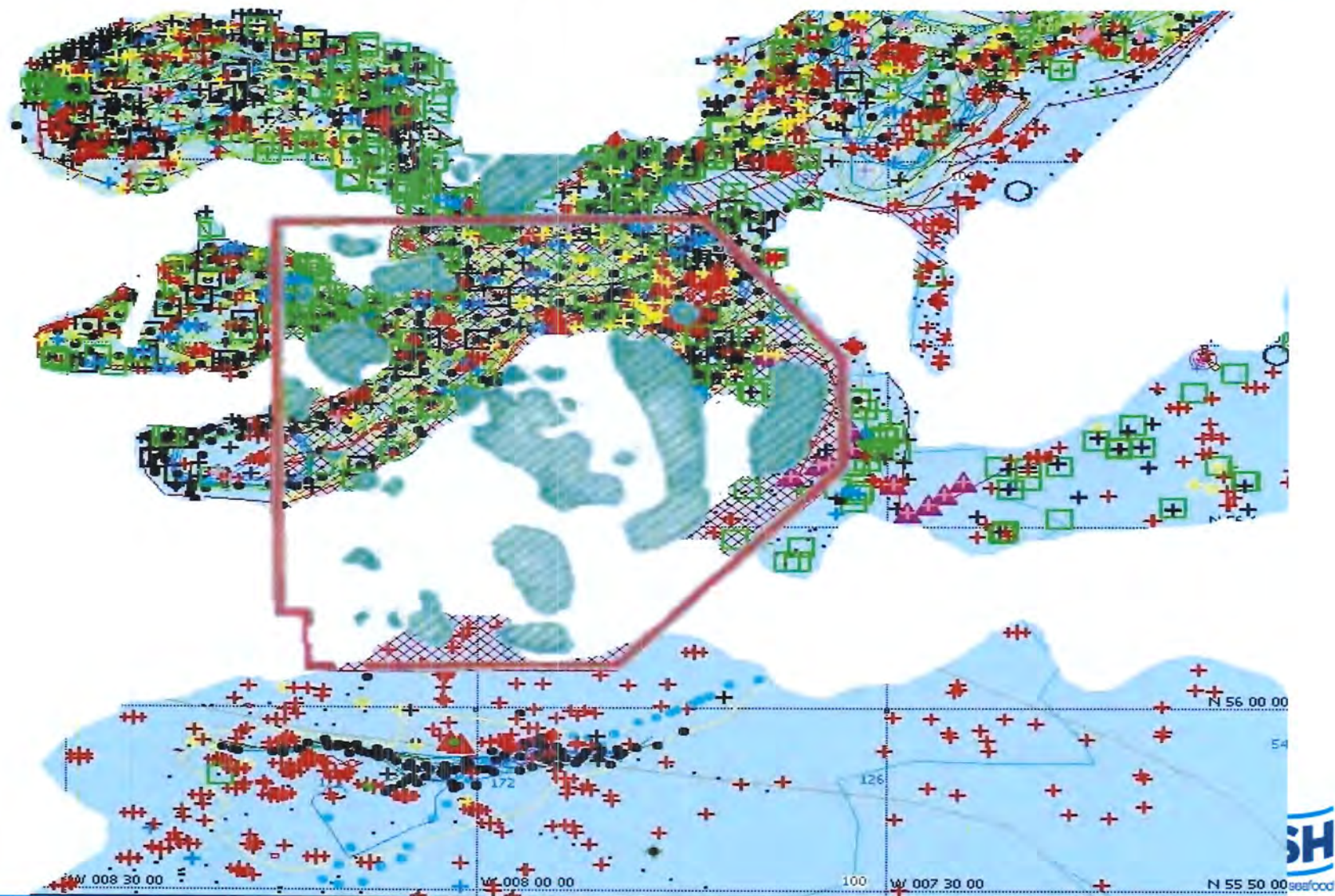


Site area: 81727 ha/ 817 km²

0 5 10 20 Km



Fisherman's track plotter data



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2007
SAC - STANTON BANKS
VMS DATA - UK FISHING VESSELS
SPEED BETWEEN 0.1 and 5

57

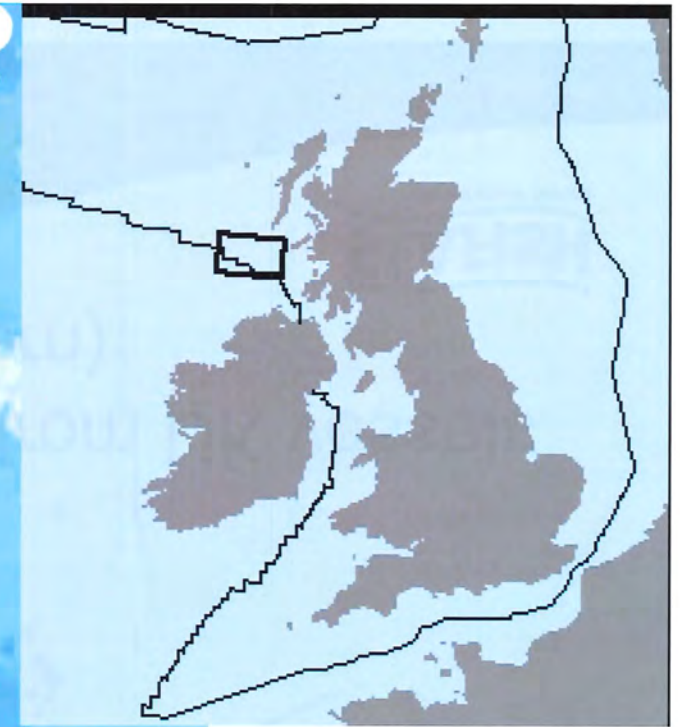
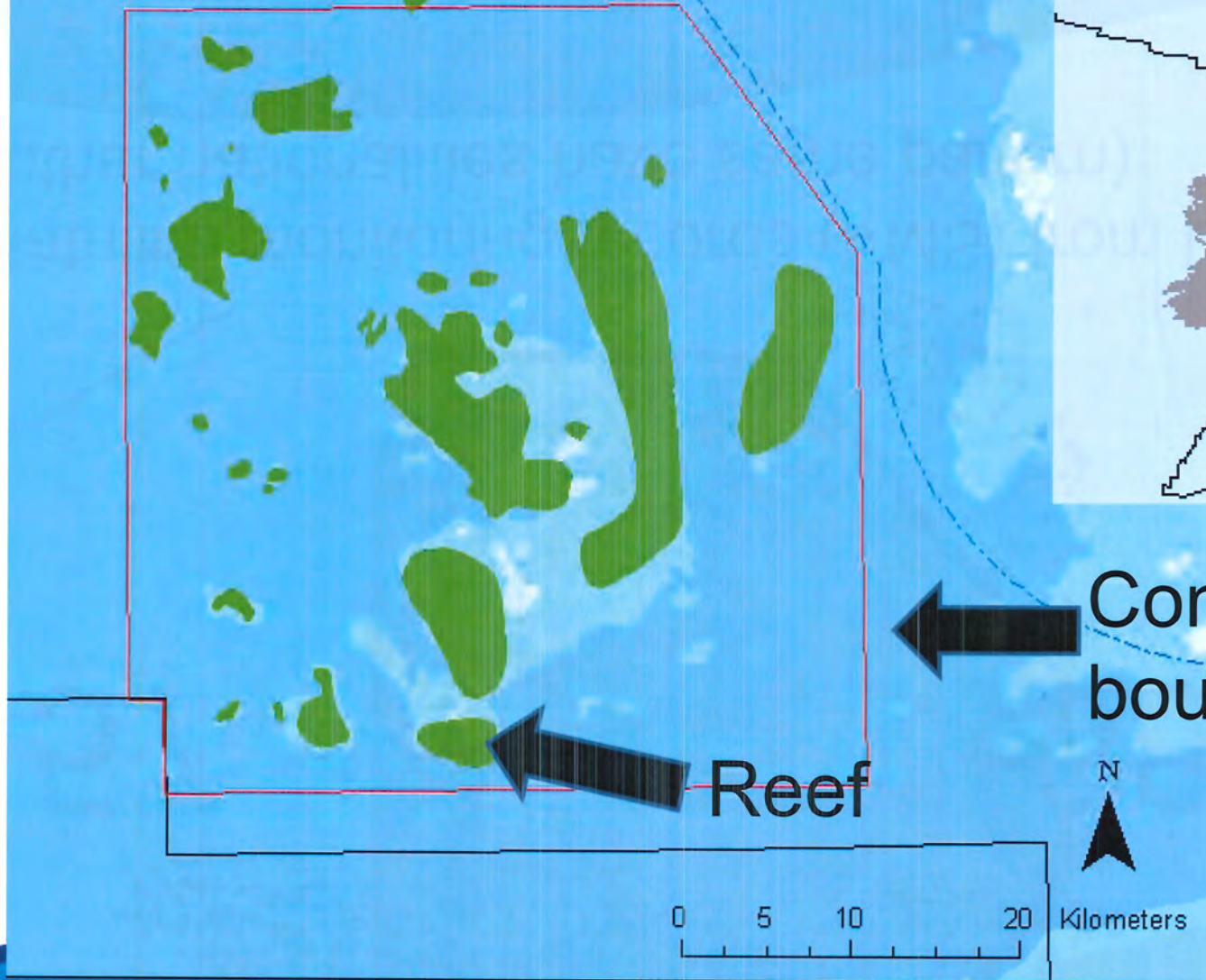


58

Mostly prawn (Nephrops) fishing on muddy seabed

Satellite monitoring records (VMS) from UK vessels (other nationalities have same pattern)

Stanton Banks offshore SAC



Consultation boundary

Reef

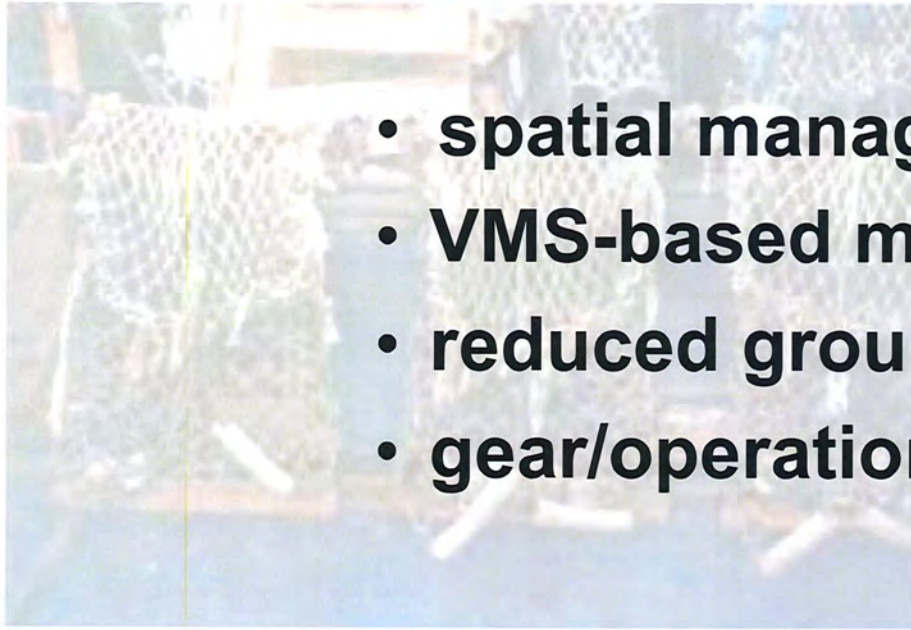
N

Kilometers

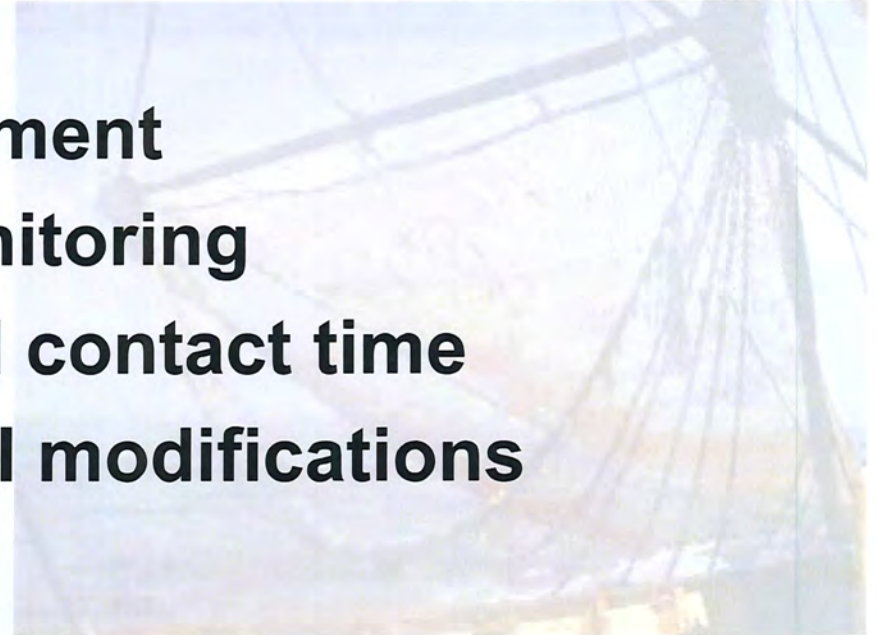


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fishing responsibly along with:



- **spatial management**
- **VMS-based monitoring**
- **reduced ground contact time**
- **gear/operational modifications**



'fishing on a square inch'

source: *Productschap Vis* 2004

Room for fishing?

- Outer Commercial Shell 'Room for Fishing'
- 12 mile zone
- Windparks NEM-Q7
- Planned windparks
- Intended 'Toekomstige' (Future) windparks
- Search area construction 'Toekomstige' (Future) windparks
- Construction and recovery
- Communication cables
- Electricity cables
- Pipe Oil and Gas
- Oil rig well safety zone
- Marine reserve
- Marine reserve 'Toekomstige' (Future)
- Sailing routes



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living in a crowded world...

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Responsible Fishing Scheme

- FAO-based
 - BSI-mediated
 - generic and vessel specific
 - NOT an indication of 'sustainability' (cf MSC)
 - recognises best practice
 - raises awareness
 - offers fishery-specific 'add-ons'
- becomes a condition of supply**



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The Good Practice Guide for Nephrops Fishermen

Contents

- 1 Introduction
 - 1.1 Background
 - 1.2 Purpose and Scope
 - 1.3 Summary of Legal Requirements
 - 1.4 Acknowledgements
- 2 Structure of the Guide
- 3 Compliance with Specific Requirements for Nephrops Fishermen
 - 3.1 Construction and Layout of the Vessel, Fish Handling and Storage Areas
 - 3.2 Fish Handling Equipment
 - 3.3 Supply of Ice
 - 3.4 Pre-Fishing
 - 3.5 Fishing
 - 3.6 Bringing Onboard
 - 3.7 On-Board Handling
 - 3.8 On-Board Storage
 - 3.9 Post-Fishing
 - 3.10 Landing
 - 3.11 Displaying for Sale
 - 3.12 Hygiene of the Crew
- 4 Appendices
 - 4.1 Dipping, Weighing, Packing and Labelling at Sea
 - 4.2 Traceability
 - 4.3 Cleaning Schedules
 - 4.4 Pest Control
 - 4.5 Temperature Monitoring
 - 4.6 Hazard Analysis
 - 4.7 Personal Hygiene for Crew
- 5 Glossary



Sea Fish Industry Authority
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Seafood Scotland
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RFS//NEWS

responsible fishing scheme

// INTRO

Welcome to the Responsible Fishing Scheme (RFS) Newsletter. In this first edition, we'll update you on the latest news, give you details on the current promotional campaign, profile some of the skippers and offer some pointers on how you can promote your award to buyers.

UPDATE

- There are nearly 600 vessels progressing through the RFS certification process, with over 300 now fully certified.
- Over 40% of the overall registered tonnage of the fleet have engaged in the scheme.
- Often we place the responsibility on skippers and indeed fishing vessels of vessels covered within the scheme.
- Special has been working with skippers and multiple vessels to talk to them about how RFS can benefit the vessels in terms of the Corporate Social Responsibility and other financial and risk of national & international markets. These meetings have been ongoing for a while.
- We will be also working with a number of local area suppliers to talk about the scheme and how it can be used effectively to meet the buying requirements of the...

300TH VESSEL

The 300th vessel has now been certified by the RFS. The Lady Maureen BM7, owned by Langdon & Philip Ltd and skippered by John Sanders, is one of five boats in their Brixham-based fleet to enter RFS on a group scheme basis, all five boats have now all been certified.



100TH SCOTTISH VESSEL

supporting the seafood industry

// Queries, feedback, and contributions to
Jo Dunlop 0131 524 8684
or email jdunlop@seafish.co.uk



Responsible Fishing Scheme

- FAO-based
- BSI-mediated
- generic and vessel specific
- NOT an indication of 'sustainability' (cf MSC)
- recognises best practice
- raises awareness
- offers fishery-specific 'add-ons'



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Another vehicle for change?



an independent, audited assessment of the application of good practice by a vessel skipper and crew in their fishing operations.



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The MSC



Marine Stewardship Council

- based on 3 fundamental principles: stock status, good management and 'other impacts'
- most applicable to single species/fleet fisheries
- can involve relatively high costs

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responsible fishing



The supply chain needed a tool which would allow them to demonstrate a commitment to responsibility with regard to seafood.



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Marine Conservation Society

- established 'industry review group'
- review new lists/scoring
- work within MoU
- significantly influence outcomes

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- **FishPhone App**
- **FishPhone** instantly puts Blue Ocean's seafood information right at your fingertips from your iPhone or iPad



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Fish Sustainability Information Group

The report identifies seven key attributes that all schemes must address in order to mitigate these problems:

- Scope;
- Accuracy;
- Independence;
- Precision;
- Transparency;
- Standardisation; and
- Cost-effectiveness.

These key attributes align with FAO guidance.

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Review of Fish Sustainability Information Schemes

Final Report



Prepared for the
Fish Sustainability Information Group
by



October 2009

A proliferation of schemes has been accompanied by:

- increasing consumer confusion,
- industry concern,
- retailer guardedness, and
- a reduction in confidence,

resulting from inconsistent approaches & contradictory advice

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Discard Action Group

- legislative
- technical/selectivity
- data/science
- marketing

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Public Awareness



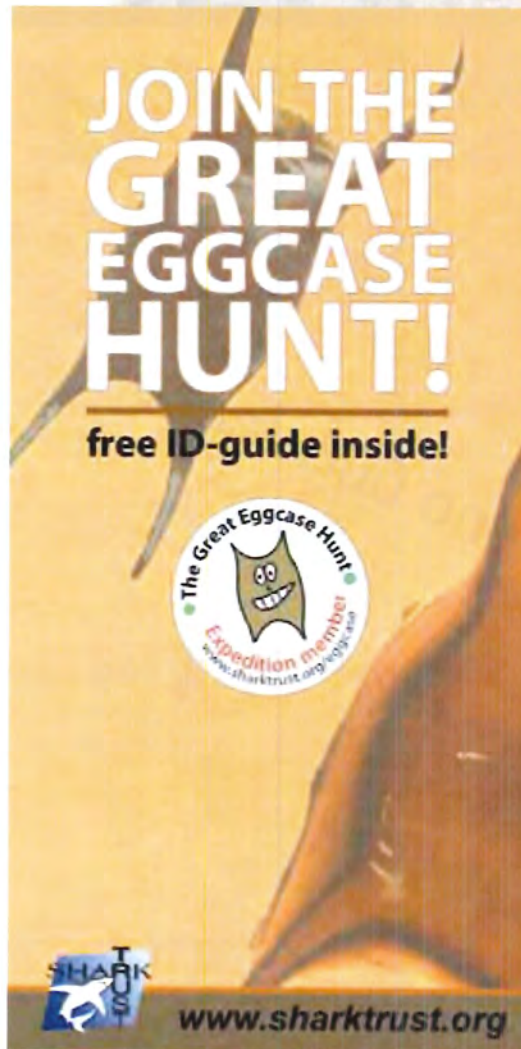
Public Recording schemes and education events.

'advancing our objectives without compromising our principles'



www.sharktrust.org

Public Awareness



Public Recording schemes and education events.

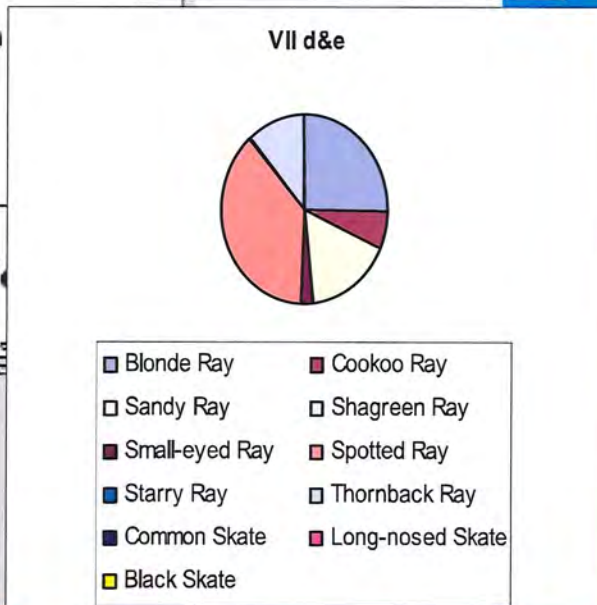
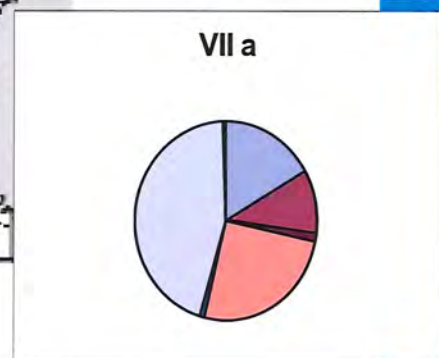
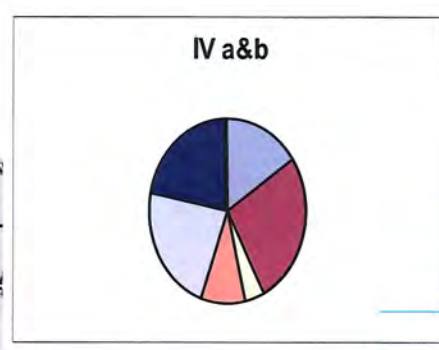
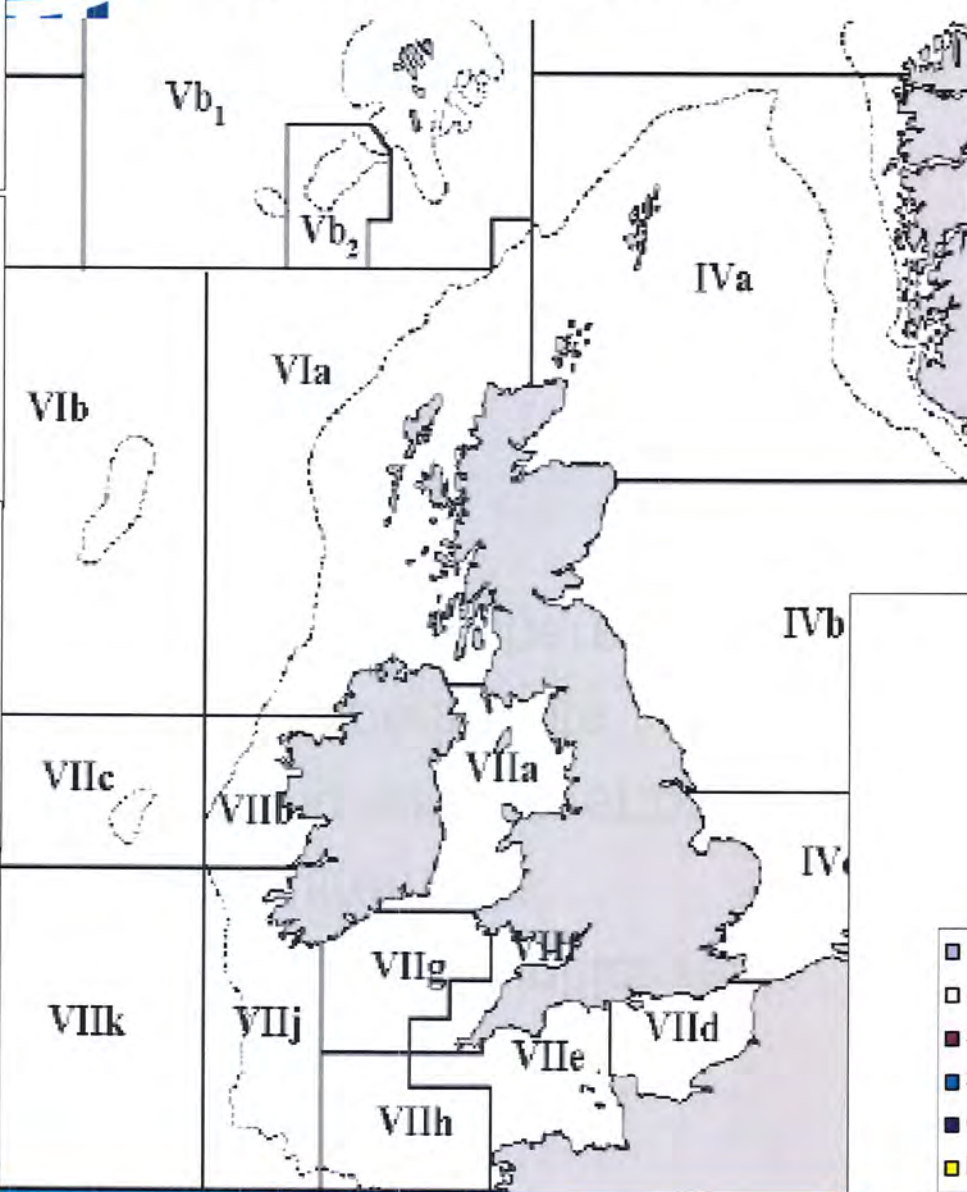
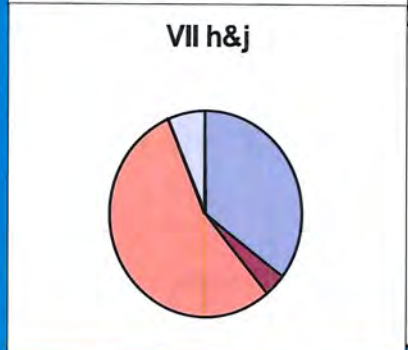
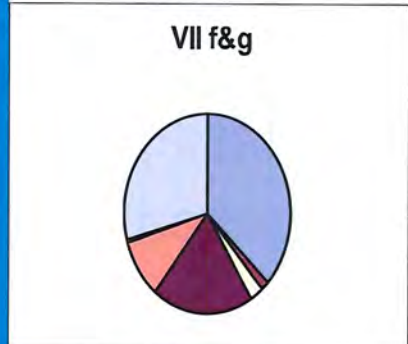
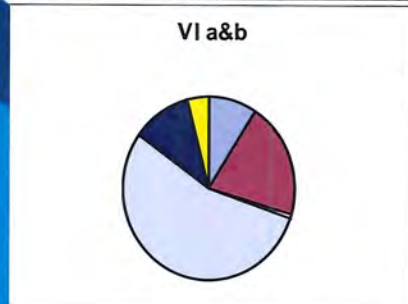
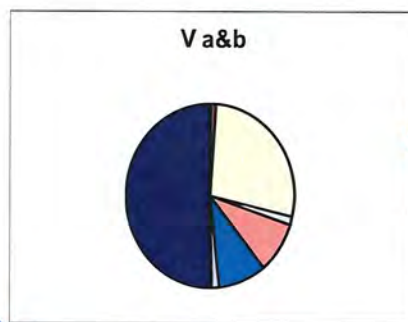


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and moving on.....

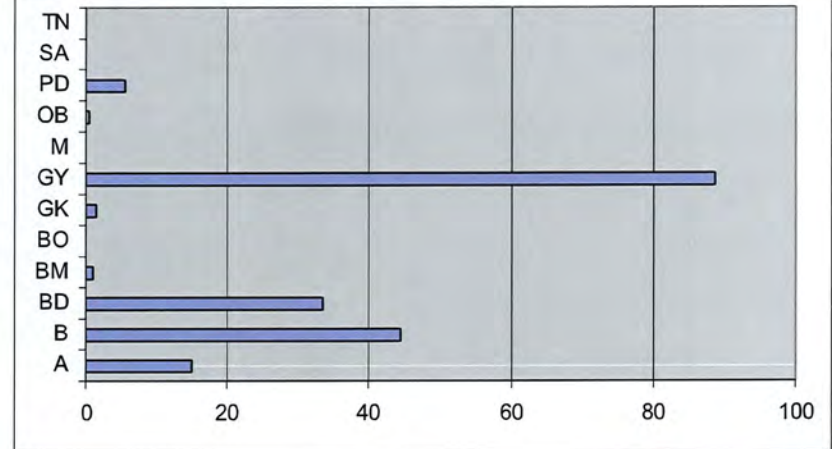
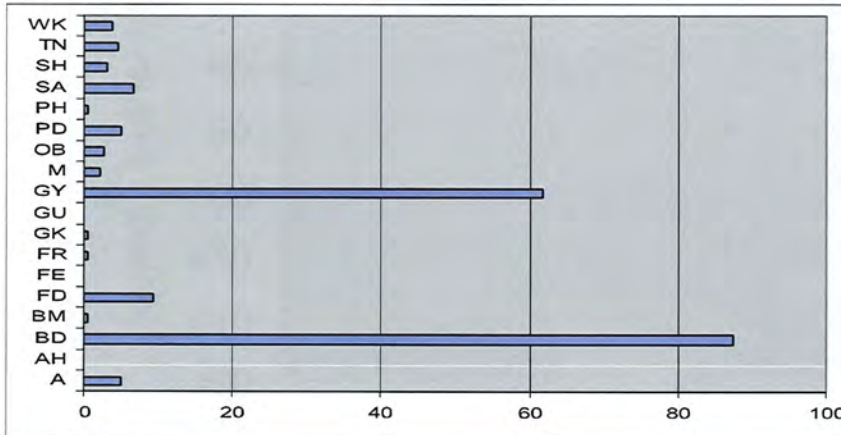
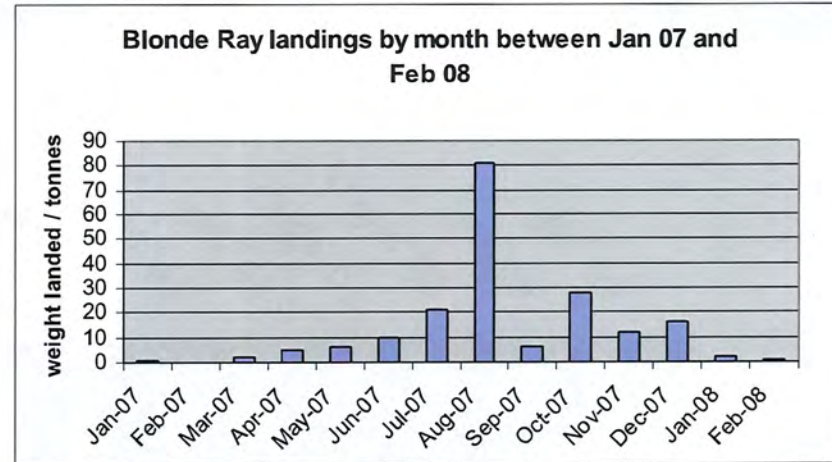
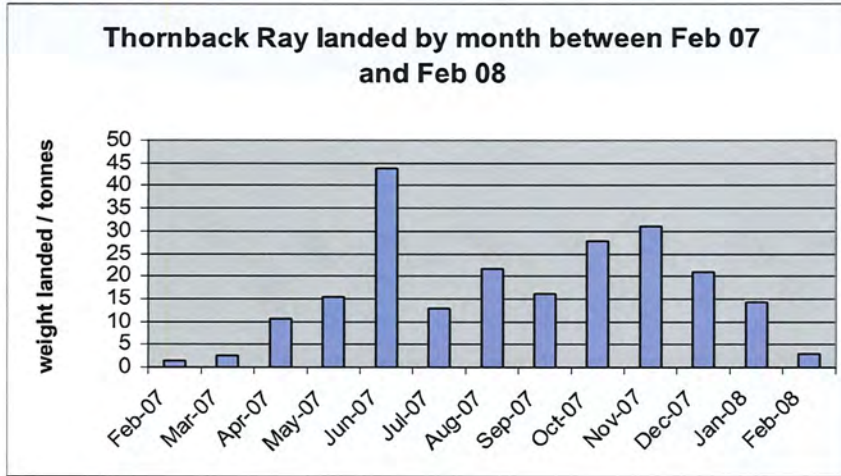
- UK & European management initiatives
- new UK reporting requirements
- Seafish database being taken over by government
- post-release survival experiments
- best practice guidelines for fishermen

Distribution of skate and ray catches by ICES area.

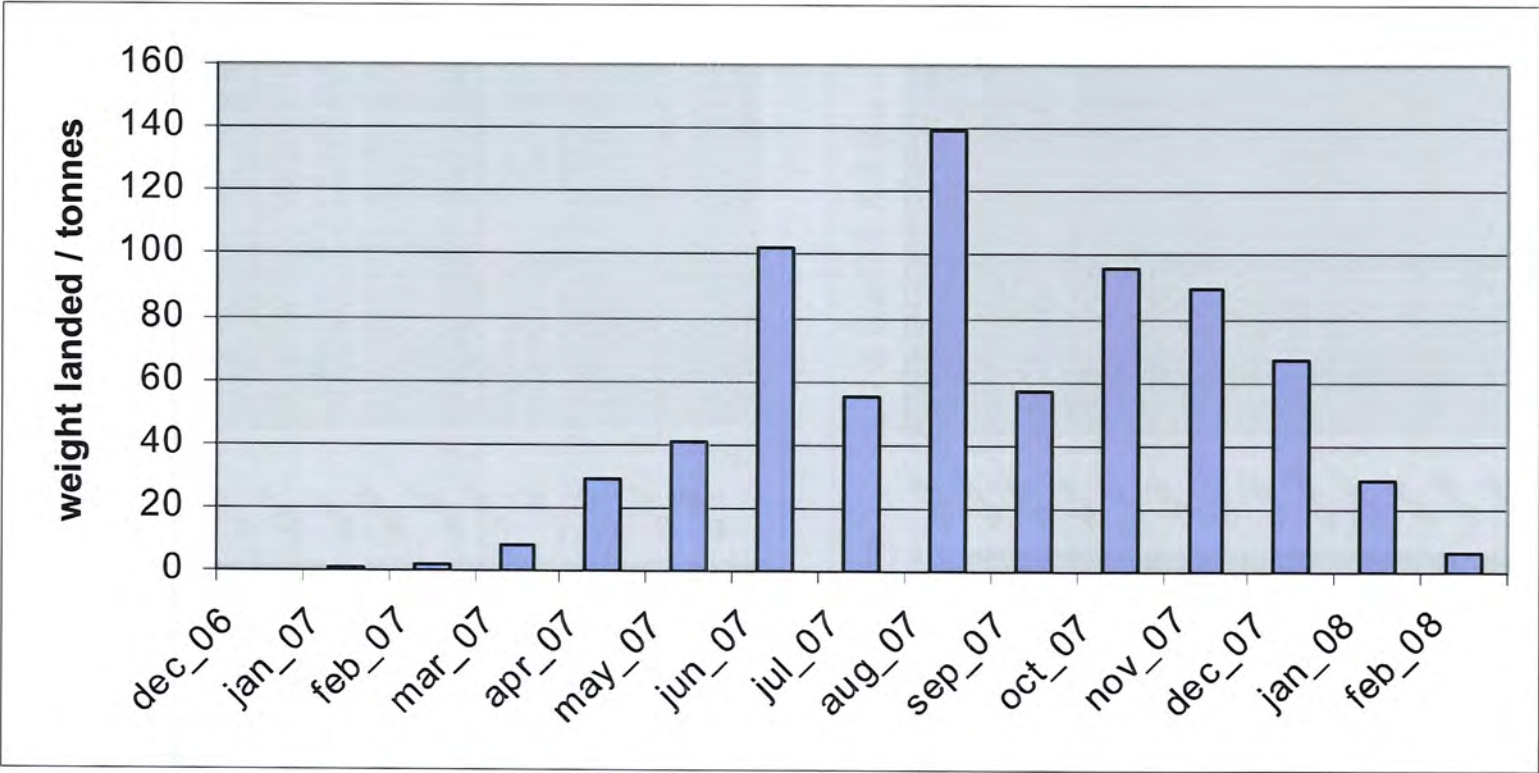


- Blonde Ray
- Sandy Ray
- Small-eyed Ray
- Starry Ray
- Common Skate
- Black Skate
- Cookoo Ray
- Shagreen Ray
- Spotted Ray
- Thornback Ray
- Long-nosed Skate

Breakdown of Thornback and Blonde Ray landings by month and port.









Volume of all skate and ray species landed into the UK - Dec 06 to Feb 08









Seafish-hosted database

Fisherman's I.D. guide to

Skates & Rays

<p>Common Skate Baltic, Gray Skate</p>  <p>Scientific name: <i>Dipturus batis</i> Description: Slate grey / blue on underside Caught size: 200cm max length</p>	<p>Long-nosed Skate Serpis</p>  <p>Scientific name: <i>Dipturus oymirinus</i> Description: Sides of disc to snout deeply concave Caught size: 150cm max length</p>
<p>Black Skate Norwegian Skate</p>  <p>Scientific name: <i>Dipturus nakamensis</i> Description: Distinctly black underneath Caught size: 200cm max length</p>	<p>Shagreen Ray</p>  <p>Scientific name: <i>Leucoraja fullonica</i> Description: Ash grey to brown with tiny dark spots Caught size: 120cm max length</p>
<p>Blonde Ray Fishes</p>  <p>Scientific name: <i>Raja brachyura</i> Description: Numerous spots that extend to the very edge of body Caught size: 120cm max length</p>	<p>Spotted Ray Fishes</p>  <p>Scientific name: <i>Raja montagui</i> Description: Numerous black spots that don't quite extend to the edge of wings Caught size: 75cm max length</p>

Fisherman's I.D. guide to **Skates & Rays**

<p>Starry Ray</p>  <p>Scientific name: <i>Amblyraja radiata</i> Description: Brownish grey with scattered irregular black blotches and some faint pale cream spots Caught size: 60cm max length</p>	<p>Thornback Ray Broom, Honey, Herringback</p>  <p>Scientific name: <i>Raja clavata</i> Description: Series of dark and light bands down the tail Caught size: 110cm max length</p>
<p>Small-eyed Ray Fishes, Sandy</p>  <p>Scientific name: <i>Raja microcellata</i> Description: Pattern of light blotches and undulating stripes on body Caught size: 90cm max length</p>	<p>Cuckoo Ray Jellyfish, Greenback</p>  <p>Scientific name: <i>Leucoraja naus</i> Description: Distinctive black and cream eye spots on each wing Caught size: 75cm max length</p>
<p>Sandy Ray Lemon, Sandfish, Thomas Roller</p>  <p>Scientific name: <i>Leucoraja arcturica</i> Description: 4-6 small creamy spots with black edging on each wing Caught size: 120cm max length</p>	<p>Undulate Ray Fishes</p>  <p>Scientific name: <i>Raja undulata</i> Description: Dark bands edged with white spots Caught size: 100cm max length</p>

If the date or the sea caught from is not marked on the specimen in this publication, contact the Shark Trust for assistance on 0203 128 30 45 or by email: fish@sharktrust.org. The species discussed here are the most commonly caught in fishery grounds around the British Isles. Other species may be encountered in the waters of these areas.



Sea Fish Industry Authority, 18 Logie Mill, Logie Green Road, Edinburgh EH7 4HS • T: 0131 558 3331 F: 0131 558 1442 E: seafish@seafish.co.uk







Illustration by Peter Cook. © European and British Antarctic Survey. www.danab.com

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Fisherman's I.D. guide to

Skates & Rays

<p>Common Skate Black, Gray Skate</p>  <p>Scientific name: <i>Dipturus laevis</i> Description: Skate grey / blue on underside Caught size: 200cm max length</p>	<p>Long-nosed Skate Spiny</p>  <p>Scientific name: <i>Dipturus oymenichus</i> Description: Sides of disc to snout deeply concave Caught size: 150cm max length</p>
<p>Black Skate New Zealand Skate</p>  <p>Scientific name: <i>Dipturus nasutus</i> Description: Distinctly black underneath Caught size: 200cm max length</p>	<p>Shagreen Ray</p>  <p>Scientific name: <i>Leucoraja fulva</i> Description: Ash grey to brown with tiny dark spots Caught size: 120cm max length</p>
<p>Blonde Ray Pillory</p>  <p>Scientific name: <i>Raja brachyura</i> Description: Numerous spots that extend to the very edge of body Caught size: 120cm max length</p>	<p>Spotted Ray Pillory</p>  <p>Scientific name: <i>Raja montagui</i> Description: Numerous black spots that don't quite extend to the edge of wings Caught size: 75cm max length</p>

Fisherman's I.D. guide to Skates & Rays

<p>Starry Ray</p>  <p>Scientific name: <i>Amiaetia radiata</i> Description: Brownish grey with scattered irregular black blotches and some faint pale cream spots Caught size: 60cm max length</p>	<p>Thornback Ray Black Thorny Hornback</p>  <p>Scientific name: <i>Raja clavata</i> Description: Series of dark and light bands down the tail Caught size: 110cm max length</p>
<p>Small-eyed Ray Pillory</p>  <p>Scientific name: <i>Raja microcellata</i> Description: Pattern of light blotches and undulating stripes on body Caught size: 90cm max length</p>	<p>Cuckoo Ray Parading Skate Crownray</p>  <p>Scientific name: <i>Leucoraja naevus</i> Description: Distinctive black and cream eye spots on each wing Caught size: 75cm max length</p>
<p>Sandy Ray Lemon Ray Pillory Pillory</p>  <p>Scientific name: <i>Leucoraja naevus</i> Description: 4-6 small creamy spots with black edging on each wing Caught size: 120cm max length</p>	<p>Undulate Ray Pillory</p>  <p>Scientific name: <i>Raja undulata</i> Description: Dark bands edged with white spots Caught size: 100cm max length</p>

If the date or size you caught does not match one of these species in the guide please contact the Shark Trust for assistance on 0203 120 30 45 or browse through their website. The species depicted here are the most commonly caught in the UK grounds around the British Isles. Other species may be encountered in the waters of these seas.



www.seafish.org

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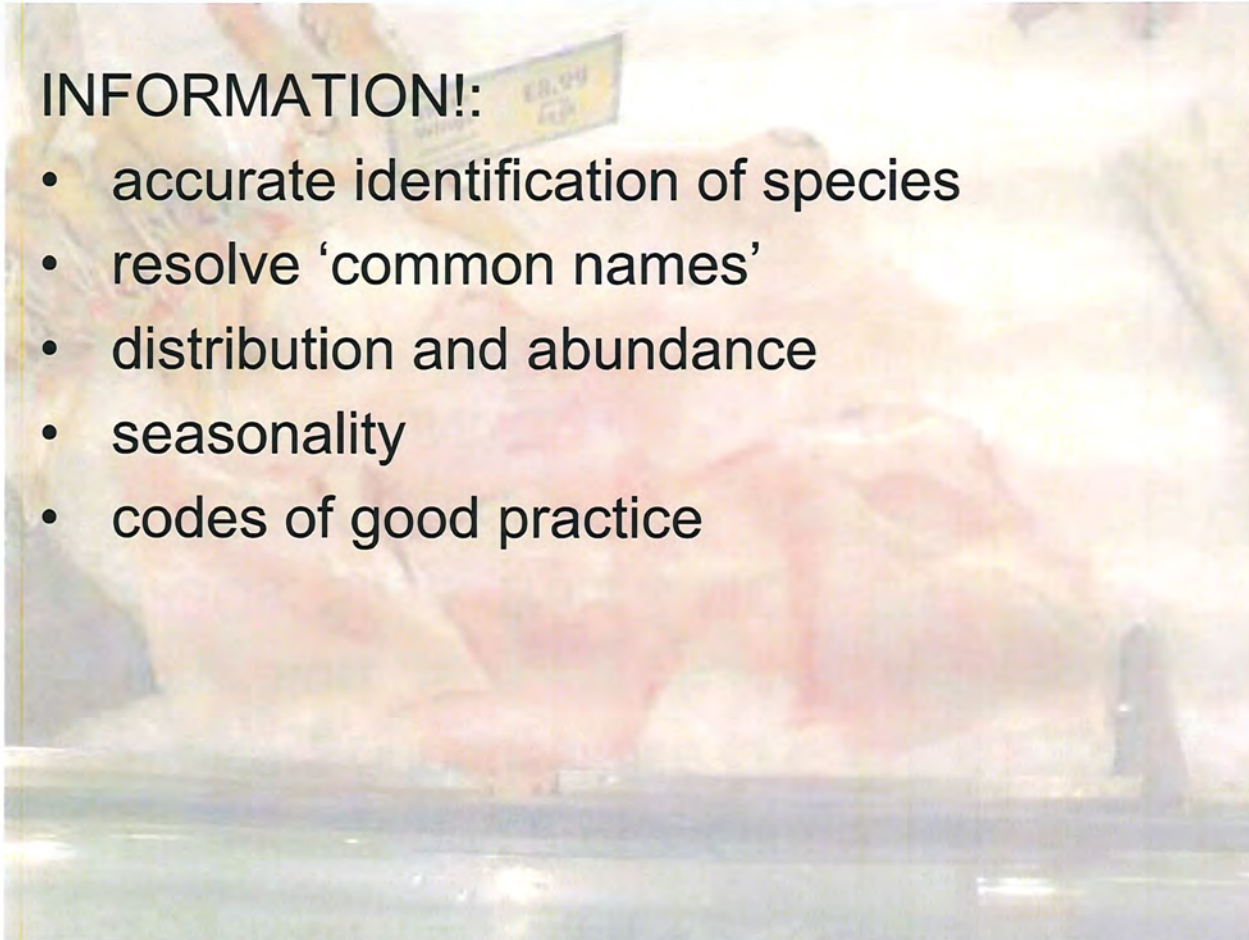
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Skate & Ray Working Group

INFORMATION!:

- accurate identification of species
- resolve 'common names'
- distribution and abundance
- seasonality
- codes of good practice



Skate & ray working group

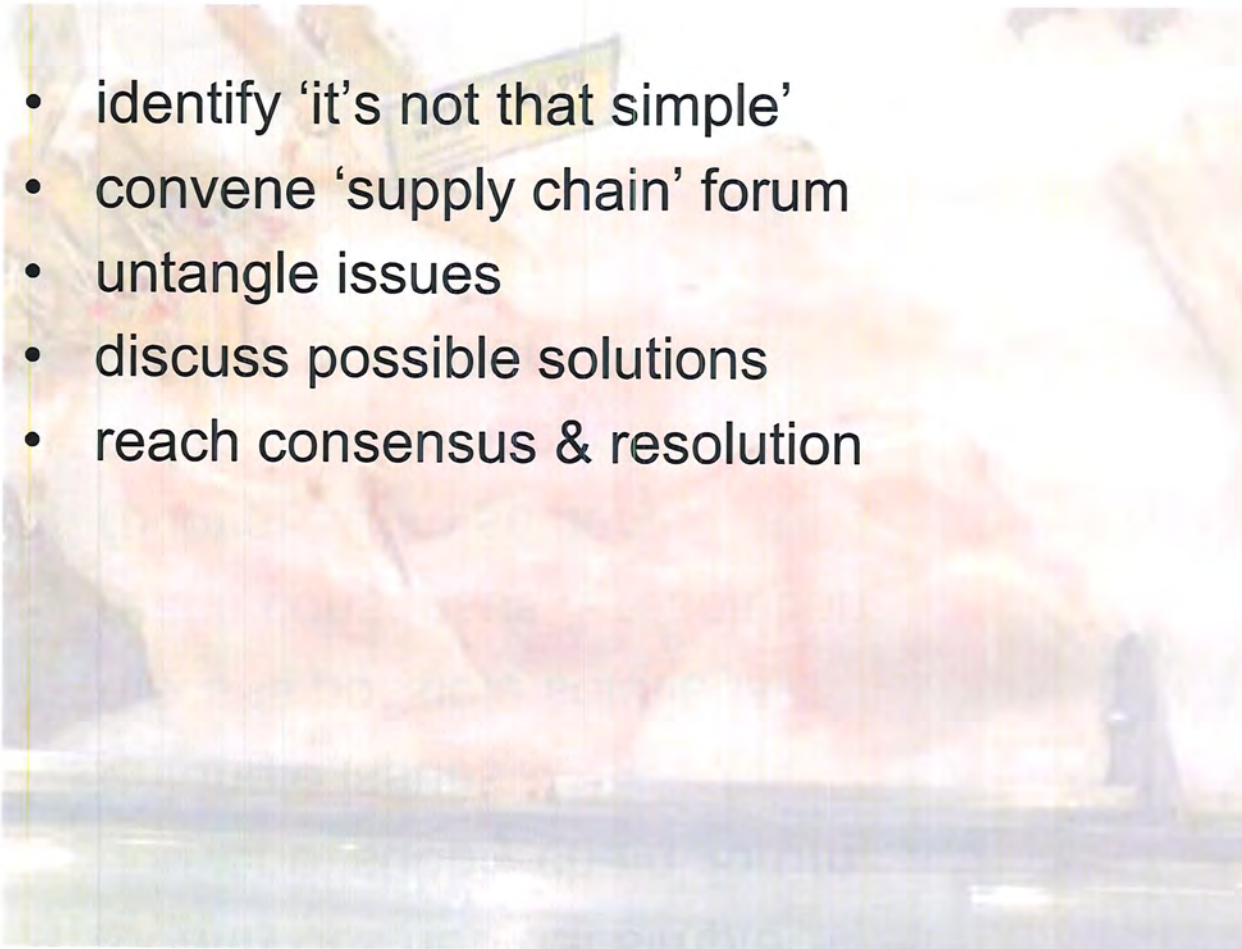
- specialist fishermen
- merchants and processors
- retailers & foodservice
- regulators
- NGOs: Shark Trust & MCS
- ICES WG chair
- Agencies: JNCC
- Seafish



approach?

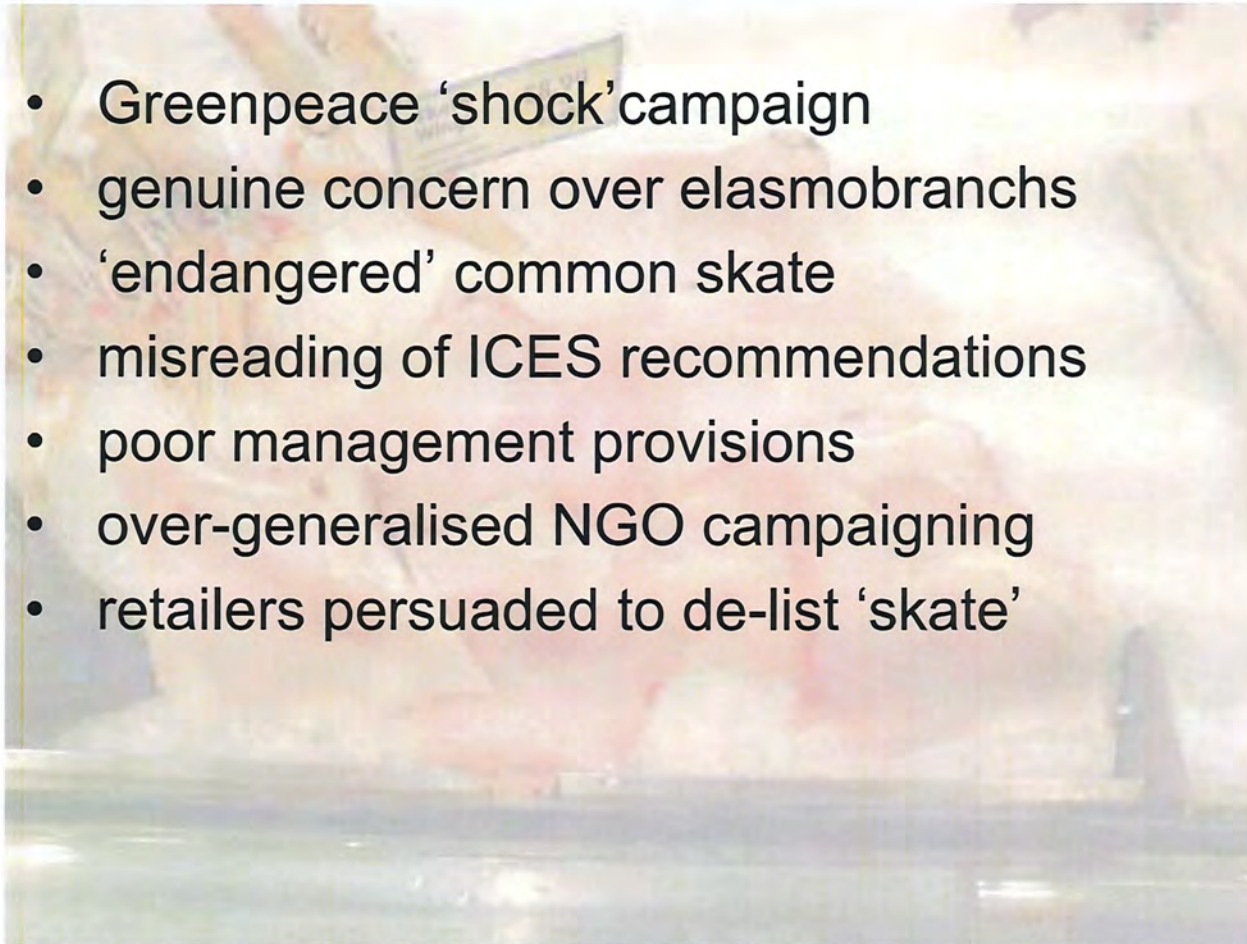
- identify 'it's not that simple'
- convene 'supply chain' forum
- untangle issues
- discuss possible solutions
- reach consensus & resolution
- ✓ recover £20m sector
- ✓ safeguard significant jobs
- ✓ build new relations & confidence

approach?



- identify 'it's not that simple'
- convene 'supply chain' forum
- untangle issues
- discuss possible solutions
- reach consensus & resolution

problem?



- Greenpeace 'shock' campaign
- genuine concern over elasmobranchs
- 'endangered' common skate
- misreading of ICES recommendations
- poor management provisions
- over-generalised NGO campaigning
- retailers persuaded to de-list 'skate'

skates & rays



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The Seafish guide to discards

Introduction

In a series of guides covering topical issues affecting the UK fishing industry, Seafish considers the nature of discarding in fishing, and what is being done to reduce them.

There are other Seafish guides on related topics including sustainability, responsible sourcing, the Responsible Fishing Scheme and bottom trawling.

The size of the problem

Discarding is fishery-specific so global totals are of limited value. However figures are available and the best source of information is FAO. In their 2005 review *Discards in the World Marine Fisheries* (1), FAO estimates that the global total is around 7.3 million tonnes, or around 8% by weight of total global catch. However, other sources estimate figures of 27 or even 39 million tonnes (2). The FAO review explains that the higher figures come from an earlier 1994 FAO publication (3). FAO states these

figures are outdated and should not be used.

It is more important to know how much discarding is occurring in each fishery and which species are affected. The level of waste may be biologically significant or it may not be significant. Sometimes very low levels of discarding can be highly significant. This will be the case if a species is endangered in some way, is highly valued or raises animal welfare issues.

Comparison of discard estimates and retained catches



Discards are those parts of the catch that are returned to the sea.

WHAT ARE DISCARDS?

Discards are those parts of the catch that are returned to the sea.

It is important to emphasise that discarding is not a universal problem affecting all fisheries. The level of discarding varies widely between fisheries, and within fisheries. Some fisheries are almost completely 'clean', others may discard more than they retain, and in some fisheries discarding is a good thing. Assessing how much of a problem discarding poses, and to whom, can be complex.

'Discards' can be counted in various ways, they can refer only to commercial fish species, to all fish species, to all animal species, including invertebrates or to all species, including plant life.

Discard rates can also be described in terms of numbers of animals or their weight. Using numbers, especially together with size, can give an idea of the waste of growth potential. Discarding many small dead fish of commercial species clearly removes any prospect of catching them later, when they would have grown bigger, and had a chance to breed.

There is no doubt that the discarding of fish wastes resources and there is an urgent need to implement measures to reduce the level of discards wherever possible.

The Seafish guide to bottom trawling

KEY POINTS

- Bottom trawling was invented in the Middle Ages.
- Nearly all suitable areas of the continental shelf have been exploited by bottom trawling.
- Trawlers work the same areas year after year. Designs of trawls can vary widely, as can the ways in which they are used.
- The seabed is modified by trawling, the degree of change varies with local conditions and the type of trawling. Some skim just over the seabed, with minimal contact, others are designed to disturb animals that are buried in the first inch or so of the seabed.
- No species have become extinct as a result of bottom trawling.
- Bottom trawling is a very efficient method of catching fish.
- The fishing industry is changing but the process of change takes time: 'bans' cause chaos.

Introduction

As part of a series of guides covering topics affecting the UK fishing industry, Seafish looks at bottom trawling. Bottom trawling involves towing a roughly cone-shaped net across the sea bed catching fish in it's path. Trawls may be used on very fine sandy ground or be rigged to ride over very hard, rocky areas of seabed.

There are other Seafish guides on related topics including sustainability, responsible sourcing and the Responsible Fishing Scheme.

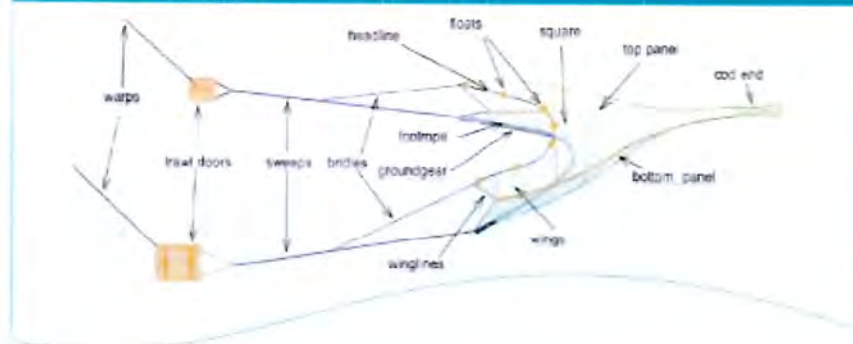
History

The first reference to bottom trawling is from a petition to Edward III in 1376 complaining of the "subtly contrived instrument called the wondychroun". This fishing method used a wooden beam to hold the mouth of the net open. At that time, sailing boats could only tow relatively small trawls. Through the 20th century mechanical propulsion, hydraulics,

position fixing, acoustics – and government policy on subsidising food production – enabled increasingly large vessels and trawls to be made, and fishing effort to increase to very high levels.

A typical trawl is shown in the figure below, the warps lead to the fishing boat.

Bottom trawling showing warps and net



Seafish guides to...

(see the Seafish website for more info: <http://www.seafish.org/>)



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Overview The species *Dicentrarchus labrax* (European Flaming Sea Bass) is the European sea bass. It is important both to commercial fisheries, where it provides a high value exportable catch for European fishermen, and to recreational sea anglers who regard it as their premier sporting species. In 2009, the total weight landed in the UK was estimated at 760 tonnes (2) with a total value of around £4.5 million (3). Sea bass has been a favourite for recreational fishing since the 1970s, and has been the subject of increasing regulation as the sector has grown. Most UK fisheries (2) of sea bass were formed in 1989 (2), compared to the other European catch of approximately 7 000 t that year (2).

There are two species of sea bass in European marine waters. *Dicentrarchus labrax*, the European sea bass, and *Dicentrarchus dentex*, the spotted sea bass. The latter is found throughout the Mediterranean Sea and along the Atlantic coasts of Portugal, Spain and France, only occasionally straying north into UK waters. It is of minor commercial interest. The European sea bass population also accounts for the distribution range of sea basses from the Bay of Biscay into coastal waters of the British Isles.

and Ireland, and through the North Sea, the south and west coasts of France. Sea bass catches are not regulated in the Atlantic Ocean (7, 8), and the only direct control is either the catch or fishing effort in sea bass fisheries in a 5 km zone (1) or per month (weight limit in UK and France vessels (7)).

The purpose of this guide is to outline the status of sea bass stocks, describe measures being taken to protect them and detail European aquaculture production.

BUYERS' TOP TIPS

Check your source of supply and avoid wild-caught fish. For assessment purposes, sea bass populations have been divided into three areas based on location of their movements and migration, and the fisheries that exploit them. Fish sold in the UK are from either the UK, the Mediterranean and the Atlantic coasts of France, Spain and Portugal. The latter is found throughout the Mediterranean Sea and along the Atlantic coasts of Portugal, Spain and France, only occasionally straying north into UK waters. It is of minor commercial interest. The European sea bass population also accounts for the distribution range of sea basses from the Bay of Biscay into coastal waters of the British Isles.

4. Assessment of sea bass stocks - Introduction

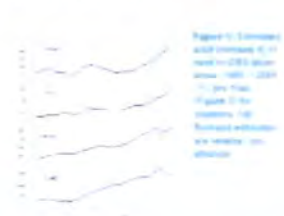
State of knowledge of sea bass stocks 2011

Biology

Adult sea bass usually occupy well defined feeding areas, which often change from year to year. In some regions it is common to offshore spawning areas that tend to be in the south and west (9). Sea bass leave off from spawning grounds to feed the shore for up to three months, and from June onwards fish sea bass in excess of 10 kg being found in estuaries and shallow bays (9). Juvenile sea bass, which are 1 year from maturity, leave the shore for up to three months, leaving their own spawning areas in estuaries and shallow bays (9). Juvenile sea bass, which are 1 year from maturity, leave the shore for up to three months, leaving their own spawning areas in estuaries and shallow bays (9).

There is no ICES assessment for sea bass, but analyses have been carried out using UK catch data from trawls, nets and lines in the North Sea, English Channel and along the West coast over the period 1992-2004 (10). A joint sea bass assessment of the North Sea, English Channel and along the West coast over the period 1992-2004 (10). A joint sea bass assessment of the North Sea, English Channel and along the West coast over the period 1992-2004 (10).

The ICES assessment for sea bass, but analyses have been carried out using UK catch data from trawls, nets and lines in the North Sea, English Channel and along the West coast over the period 1992-2004 (10).



5. Responsible Sourcing Guide: Sea bass - Version 4 - Assessment 2011

Management and conservation

Research on sea bass in the UK in the mid-1950s identified too many small fish were being caught, reducing the potential yield from the fishery (10). This led to the implementation of a 36cm minimum landing size (MLS) for sea bass in 1958. This was replaced by a 30cm MLS in 1999. The 30cm MLS was replaced by a 36cm MLS in 2001. The 36cm MLS was replaced by a 36cm MLS in 2001. The 36cm MLS was replaced by a 36cm MLS in 2001.

In 1980, the British Fishery Commission introduced measures to close commercial fishing for sea bass to conserve spawning stocks and promote self-sustaining stocks. This was replaced by a 36cm MLS in 1999. The 36cm MLS was replaced by a 36cm MLS in 2001. The 36cm MLS was replaced by a 36cm MLS in 2001.

For marketing reasons, France introduced a national regulation in 1989 to limit sea bass catches to 500 kg per fisherman. This was replaced by a 36cm MLS in 1999. The 36cm MLS was replaced by a 36cm MLS in 2001. The 36cm MLS was replaced by a 36cm MLS in 2001.

6. Responsible Sourcing Guide: Sea bass - Version 4 - Summary 2011

Management check (score 1-5)	Management advice	Comments, advice and management
WILD CAPTURE BIOLOGICAL LIMITS		
Stock size (ICES risk)	UK, EU, France	ICES 2011 Reference points not defined. Adult biomass appears to have increased over the last 10 years. Figure 1 (17). The small English Channel, the catch on the East coast (total allowed) (BRC certification in 2007) (18).
Stock trends (ICES risk)	UK, EU, France	ICES 2011 Reference points not defined. Adult biomass appears to have increased over the last 10 years. Figure 1 (17). Line caught sea bass in the UK by EU/FAO members are tracked and variable to the fisheries (19).
Stock trends (ICES risk) - g.p.	UK, EU, France	ICES 2011 Reference points not defined. Adult biomass appears to have increased over the last 10 years. Figure 1 (17). Line caught sea bass in the UK by EU/FAO members are tracked and variable to the fisheries (19).
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Figure 2: Map of sea bass stock areas (colours) linked to tables (reference, carrying capacity, regulation, harvest, and a world map of 187 sea bass fisheries. 7 tonnes catch of 2009).



ICES
The International Council for the Exploration of the Sea is responsible for providing advice for North East Atlantic fishery management.

EU
The European Union manages fisheries within the Exclusive Economic Zone and in cooperation with nearby coastal states.

EWFA
The South West Fisheries Association represents more than 50 freelance fishermen in SW England.

MSC
The Marine Stewardship Council is an independent non-profit organisation that promotes responsible fishing practices.

7. Responsible Sourcing Guide: Sea bass - Version 4 - Assessment 2011

Fisheries and fishing methods

Fishing methods
Commercial sea bass fisheries in north-west Europe developed steadily in the late 1970s and 1980s, partly because of the high prices the species attracted (10). The main fisheries expanding were those in a larger zone between the English Channel and the Atlantic coasts of France, Spain and Portugal. The latter is found throughout the Mediterranean Sea and along the Atlantic coasts of Portugal, Spain and France, only occasionally straying north into UK waters. It is of minor commercial interest. The European sea bass population also accounts for the distribution range of sea basses from the Bay of Biscay into coastal waters of the British Isles.

Stocking
Intensive sea bass farming has increased rapidly since the early 1980s. The general practice today is to use relative and absolute stocking rates to ensure maximum yields. This method has been practiced widely in France, Spain, Italy and other countries for many years.

Stocking
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...for a sustainab

8. Responsible Sourcing Guide: Sea bass - Version 4 - Assessment 2011

Standard
Sea bass - The SEAFISH Standard is a certification scheme for sea bass. It is a certification scheme for sea bass. It is a certification scheme for sea bass. It is a certification scheme for sea bass.

9. Responsible Sourcing Guide: Sea bass - Version 4 - Assessment 2011

Responsible Sourcing
Responsible Sourcing is a certification scheme for sea bass. It is a certification scheme for sea bass. It is a certification scheme for sea bass. It is a certification scheme for sea bass.

Region	1	2	3	4	5	6	7	8	9	10	11	12
Southwest Sea												
English Channel												
West Coast of France												

SEAFISH
The Sustainable Seafood Campaign. For more information, visit www.seafish.org.

<http://www.seafish.org/b2b/>

Seafish guide to responsible sourcing of

cod

SEAFISH



Introduction

The world catch of cod is approximately 1.2 million tonnes (1.2 million tonnes) per annum (1.2 million tonnes) and is one of the most popular fish, with approximately 20 million tonnes consumed in the UK each year. The majority of cod is sourced from the North Atlantic, but there are also smaller quantities sourced from the UK during winter.

BUYER'S TOP TIPS

1. Know your source of supply and check the provenance of the fish. This includes checking the catch area, the vessel, the date of catch, and the date of landing. It also includes checking the catch area, the vessel, the date of catch, and the date of landing.
2. Know your source of supply and check the provenance of the fish. This includes checking the catch area, the vessel, the date of catch, and the date of landing. It also includes checking the catch area, the vessel, the date of catch, and the date of landing.
3. Know your source of supply and check the provenance of the fish. This includes checking the catch area, the vessel, the date of catch, and the date of landing. It also includes checking the catch area, the vessel, the date of catch, and the date of landing.

Seafish guide to responsible sourcing of

skates & rays

SEAFISH



Introduction

Skates and rays comprise a large group of fish, which includes the four skates (blue skate, spiny skate, starry skate and stingray). The main commercial species within northern European waters are the four skates, which have common names that generally distinguish the large species with long, pointed snouts from the smaller species with short snouts (spiny). For the purposes of this guide, the term skate is used to describe total commercially viable species in all the waters, and includes short skate species that have the most size in their common skate.

BUYER'S TOP TIPS

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Seafish guide to responsible sourcing of

scallops

SEAFISH



Seafish guide to responsible sourcing of

Alaska pollock

SEAFISH



Introduction

Alaska pollock is the largest fish in the United States (USA), with annual catches averaging more than 1 million tonnes. Alaska pollock fillets are used throughout America as the raw material for high and battered fish products. The flesh is used in the UK as fish sticks.

BUYER'S TOP TIPS

1. Know your source of supply and check the provenance of the fish. This includes checking the catch area, the vessel, the date of catch, and the date of landing. It also includes checking the catch area, the vessel, the date of catch, and the date of landing.
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Responsible sourcing guides

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the Common Language Group

- Responsible Sourcing Guides
- Seafish 'guides to....'
- Skate & Ray Group
- Discard Action Group
- Certification & advice schemes
- Responsible Fishing Scheme
- Marine Conservation Society



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using knowledge, communication,
traceability and consensus to
build supply chain confidence

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the 'common language' group

- fishermen, merchants, processors, wholesalers, retailers, foodservice, NGOs, regulators & managers
- issue-based:
 - seafood scoring systems
 - discards
 - beam trawling & seabed impacts
 - IUU fishing
 - fish meal

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the 'common language' group

- fishermen, merchants, processors, wholesalers, retailers, foodservice, NGOs, regulators
- issue-based
- demands accountability
- identifies highest common denominator
- builds understanding
- develops consensus positions
- results in supply chain confidence

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where did the 'common language' group start?

FISH WILL STOCKS LAST?



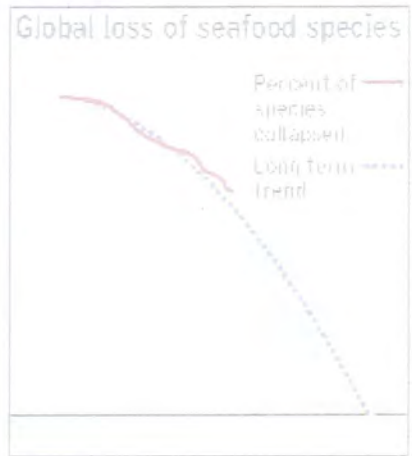
No.1
worst fish
retailer

More reasons NOT to shop at 

Morrisons trash the oceans to fill their shelves



GREENPEACE



No more fish to eat in 40 years

Study warns that all seafood stocks will have collapsed by 2048

By Richard Black, Environment correspondent, BBC News website




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who can we believe . . . ?

FISH **WILL STOCKS LAST?** *defending OCEANS GREENPEACE*

No.1
worst fish
retailer

More reasons NOT to shop at 

Morrisons trash the oceans **only 50 years left for sea fish** to fill their shelves

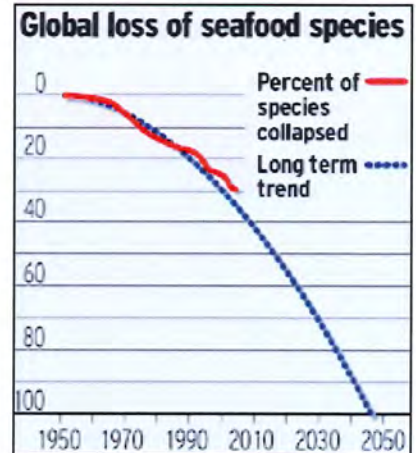


GREENPEACE

No more fish to eat in 40 years

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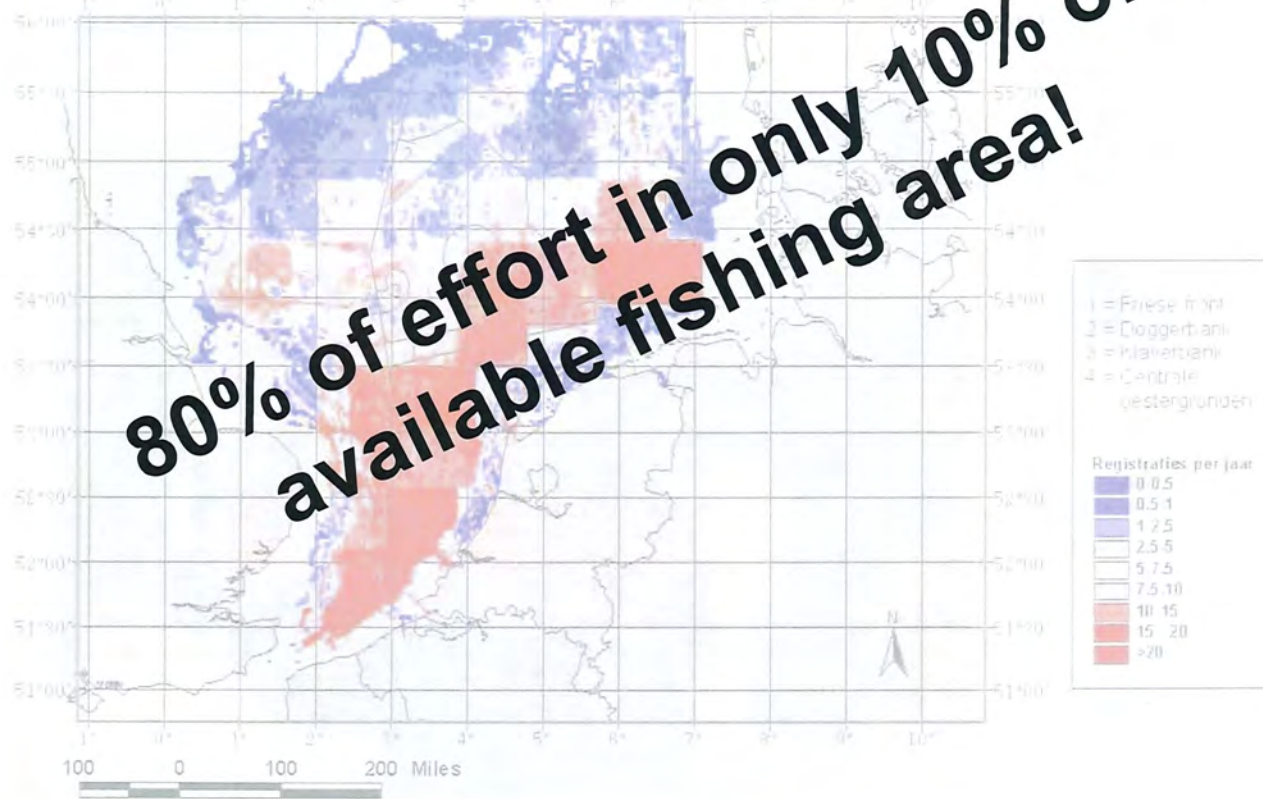


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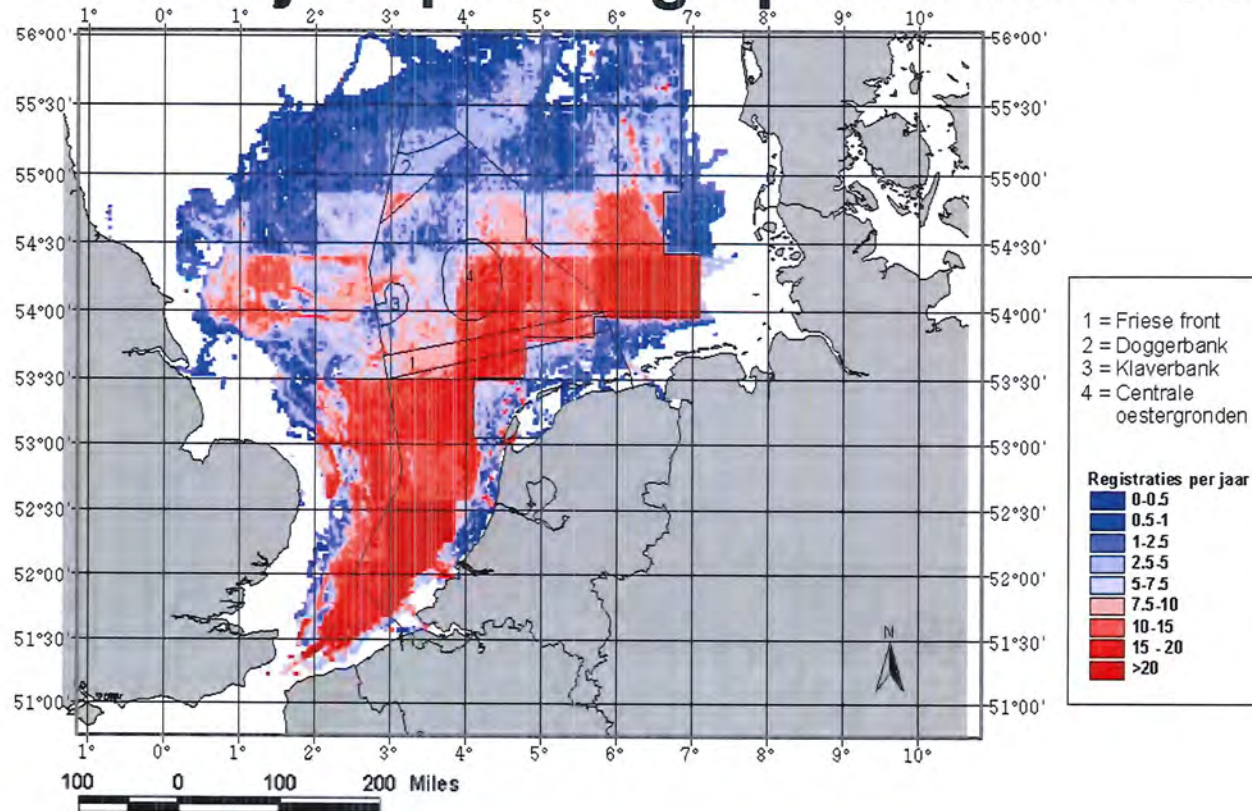
effort distribution

Visserij inspanning op de Noordzee



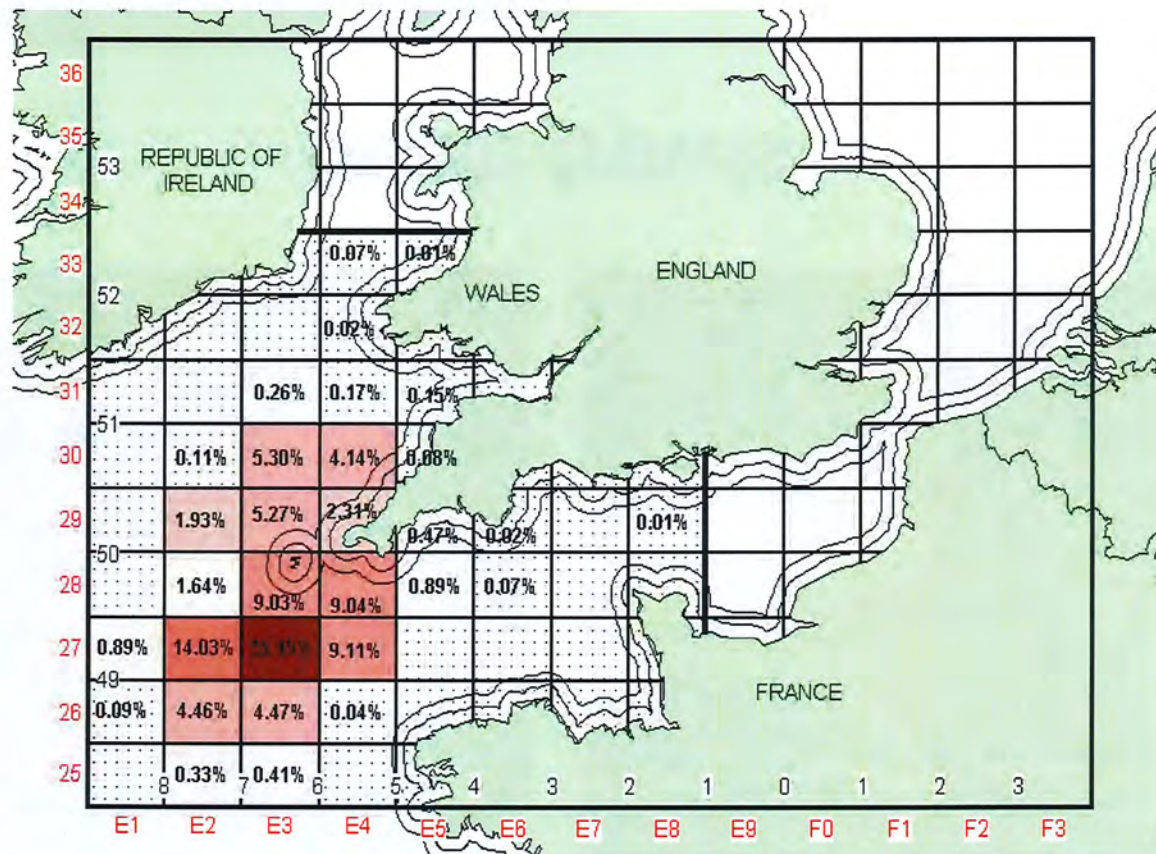
effort distribution

Visserij inspanning op de Noordzee



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effort distribution



big and heavy, but . . .



beam trawls

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the things they say!

Beam trawling has been compared to dragging a net big enough to encompass several Boeing aeroplanes across the rainforest, uprooting everything in its path, indiscriminately. On the seabed, such destruction is largely invisible and therefore goes unchecked (London Food Commission, 2007, webpage).

So *now* read:

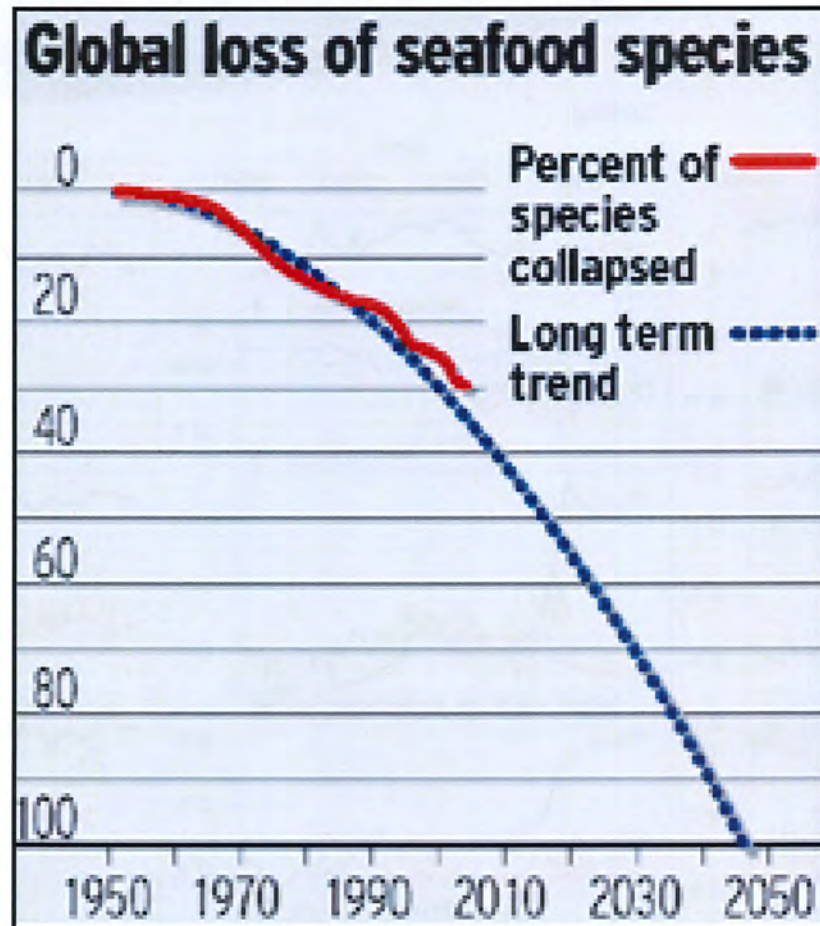
- **Ray Hilborn's critique**
- **Worm's retraction**
- **The Worm/Hilborn joint paper.....**

(but we still hear most about 2048!)

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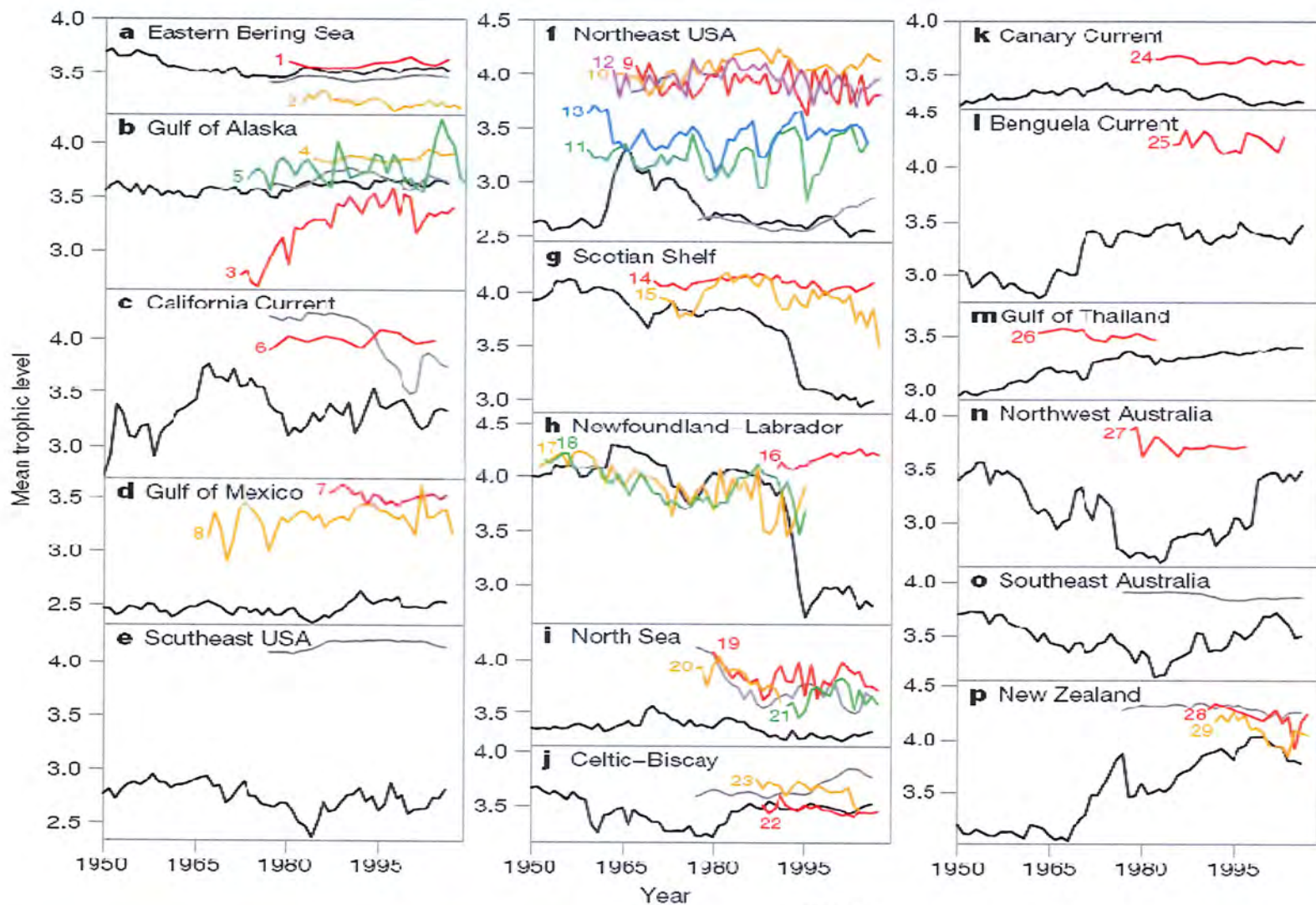
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Worm *et al* predicted..... (Worm et al, Nature, 2006)



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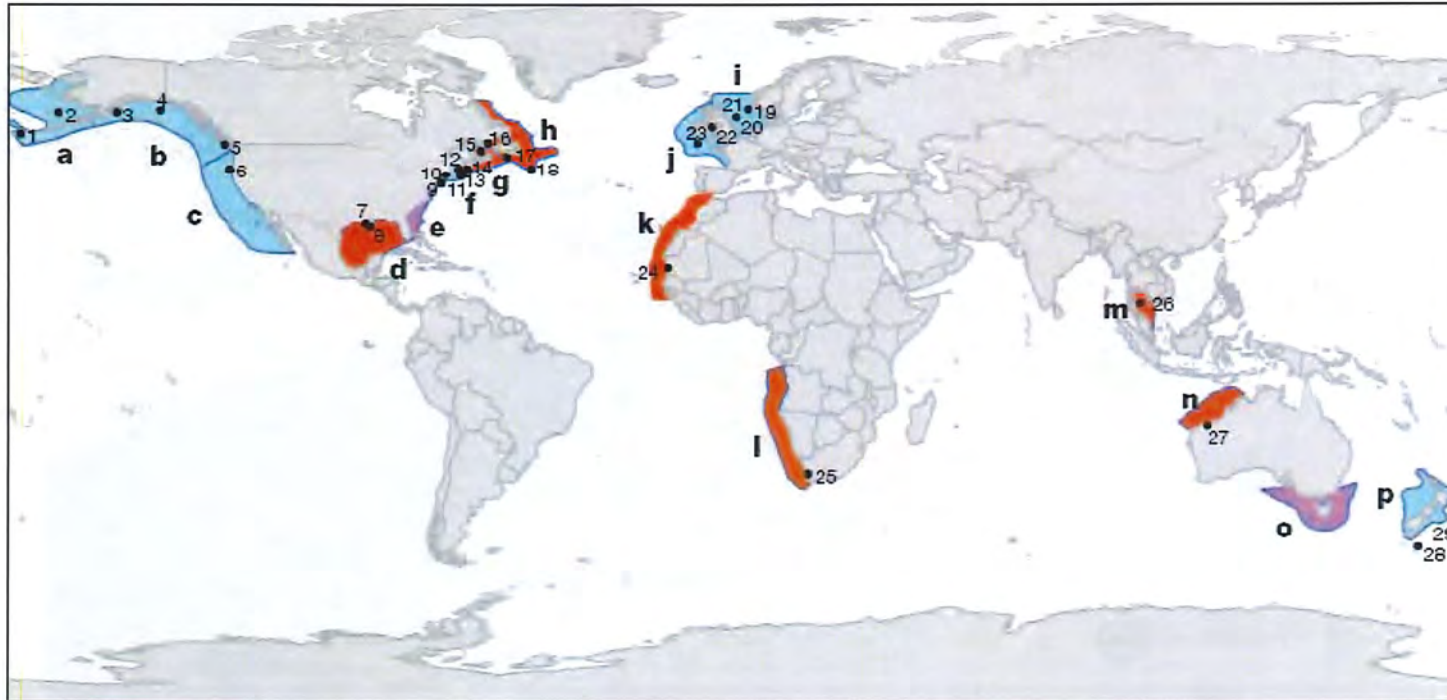


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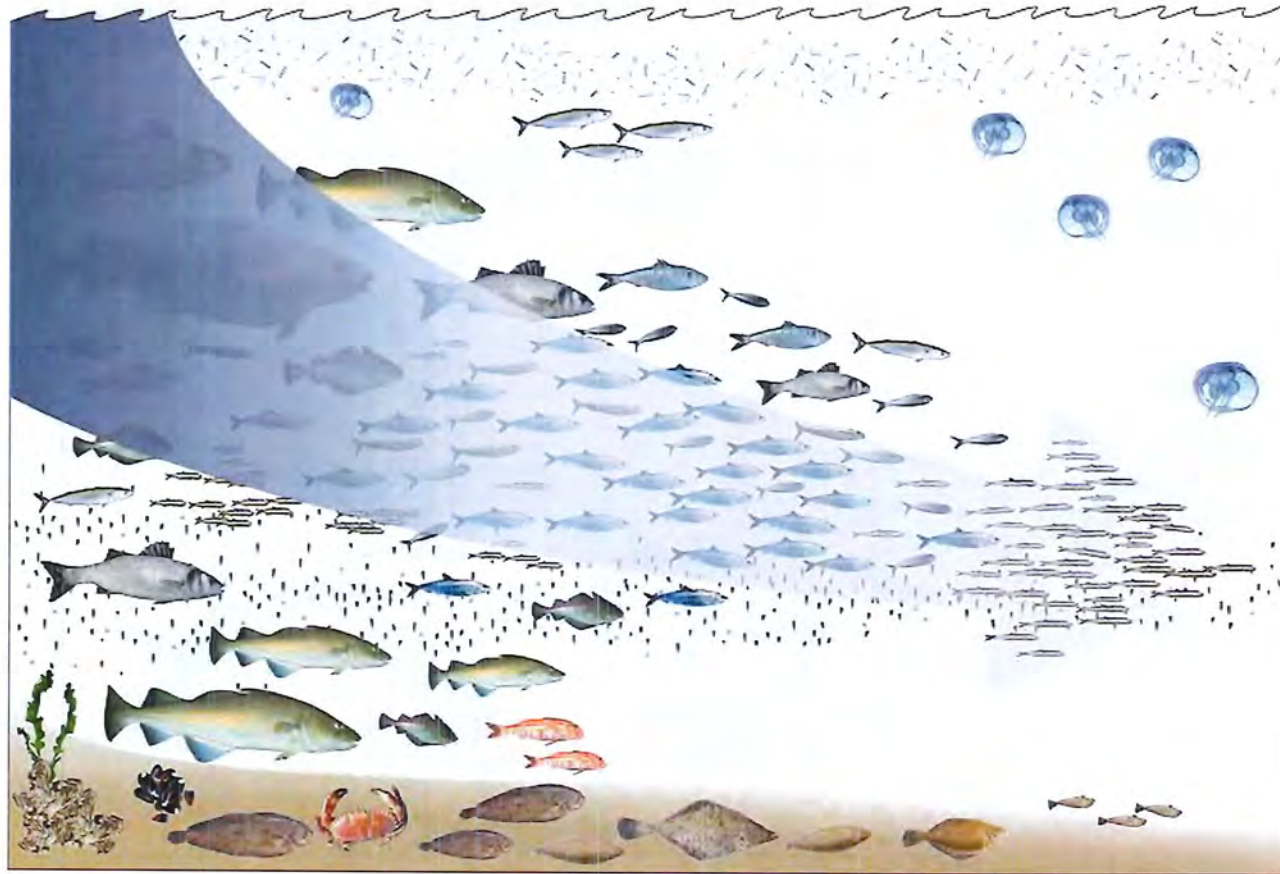


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But Branch *et al* (2010) added in more data....



Based on interpretation of 'mean trophic level'

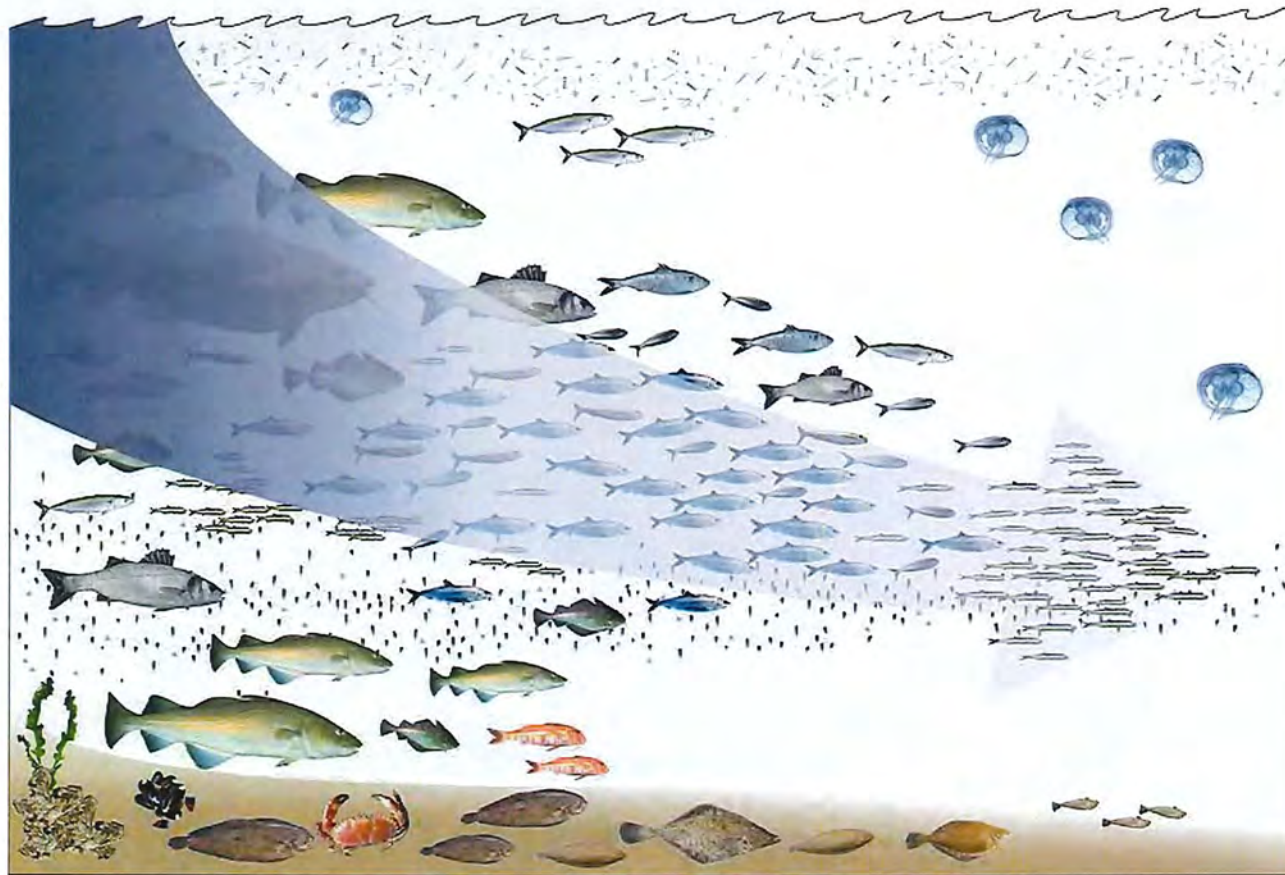


© Hans Hillewaert (and after Pauly, 1998)

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Fishing down the food web



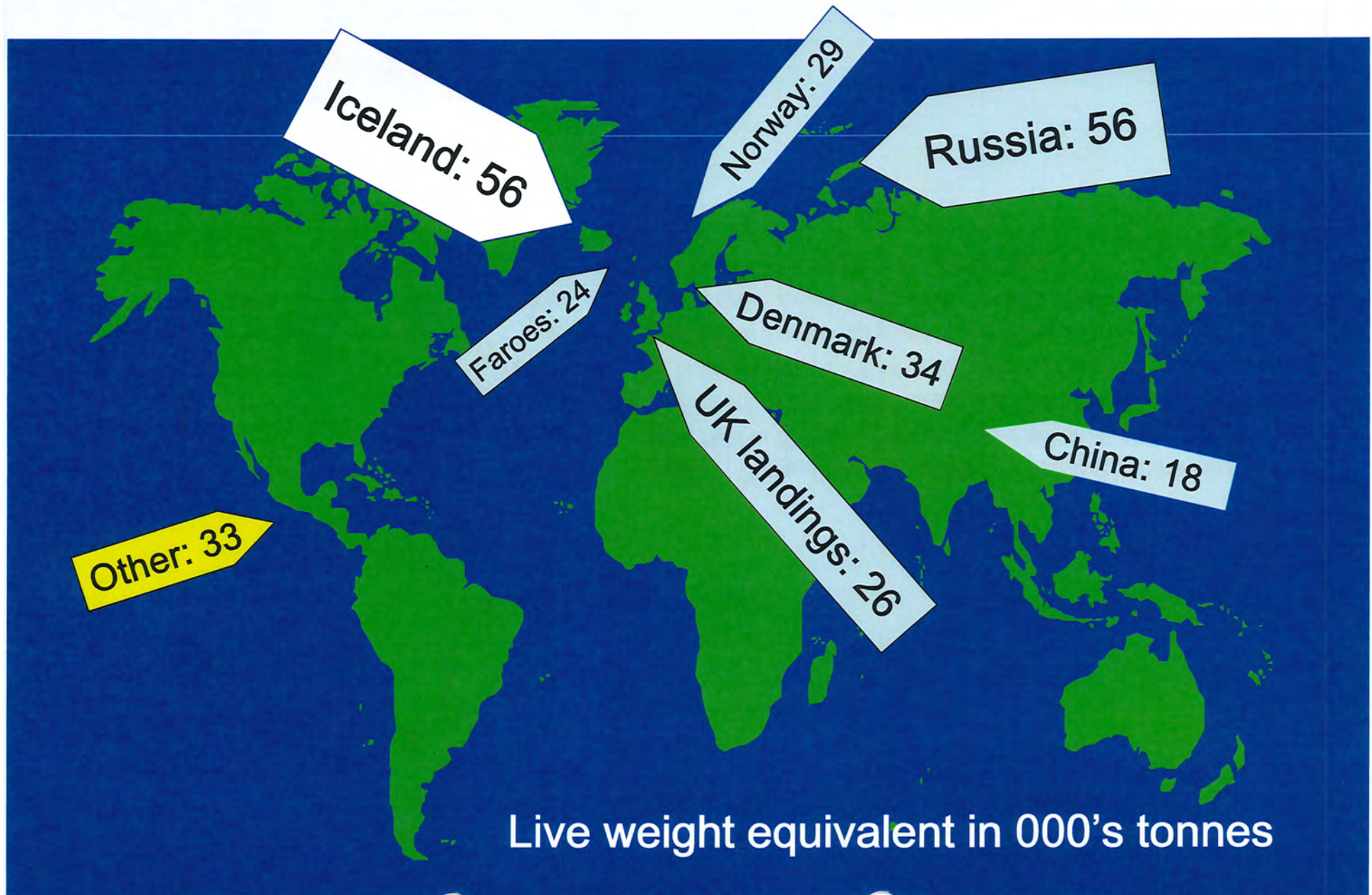
© Hans Hillewaert (and after Pauly, 1998)

where are we now? biodiversity

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UK Cod imports ~250,000 tonnes



Live weight equivalent in 000's tonnes

The effects of 118 years of industrial fishing on UK bottom trawl fisheries

Ruth H. Thurstan¹, Simon Brockington² & Callum M. Roberts¹

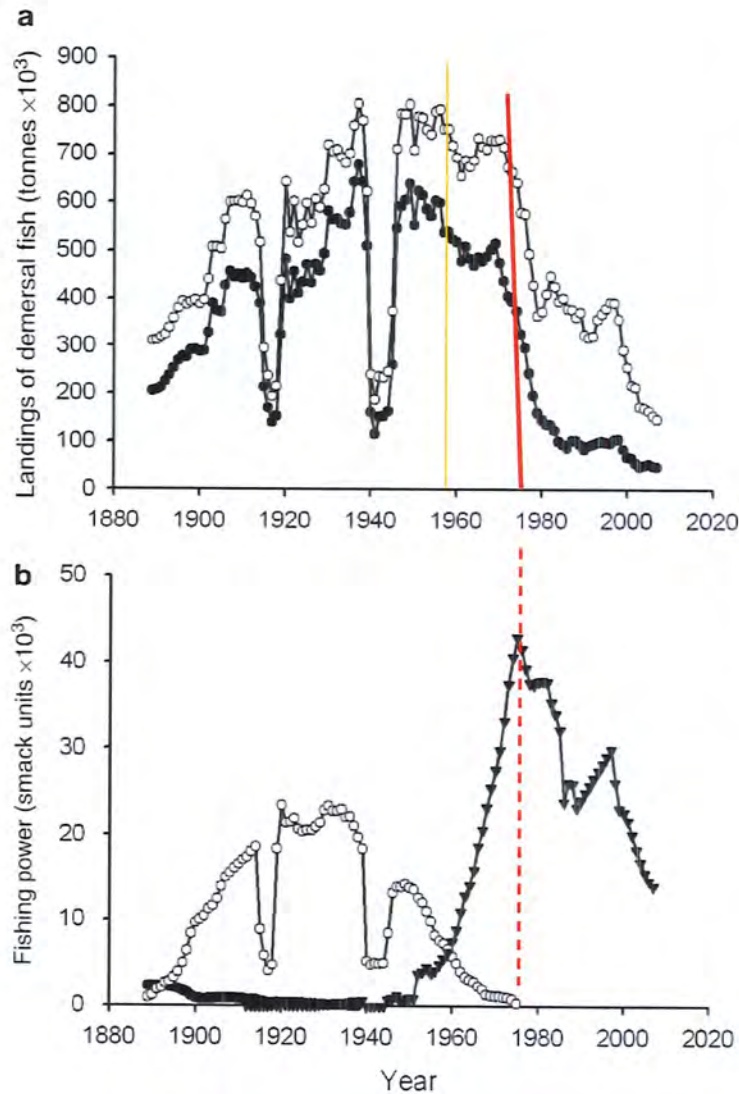
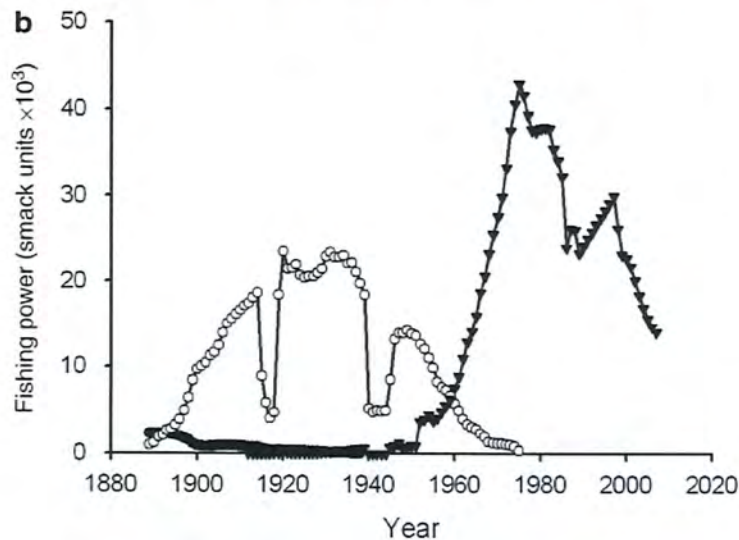
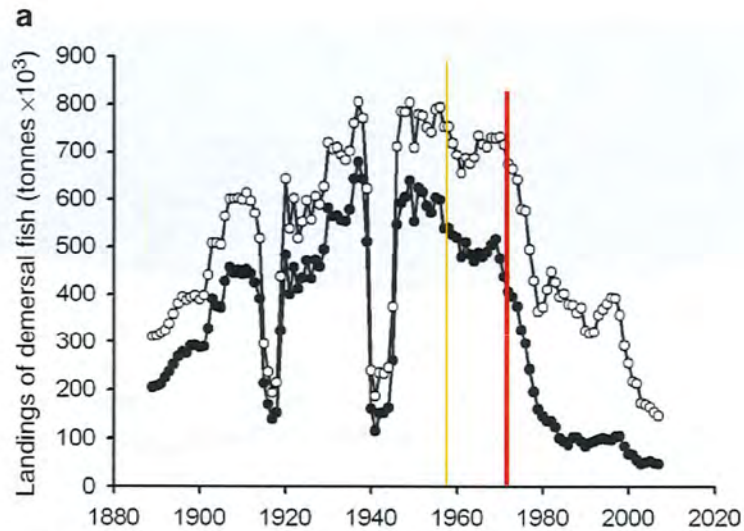


Figure 1 | Change in landings and fishing power of bottom-living fish from 1889 to 2007. (a) Total landings of bottom-living fish species into England and Wales (closed circles) and the United Kingdom (open circles) by British vessels from 1889 to 2007. (b) Estimated total fishing power of large British trawlers registered to England and Wales from 1889 to 2007. Closed circles indicate sail trawlers, open circles indicate steam trawlers and closed triangles indicate motor trawlers.



The effects of 118 years of industrial fishing on UK bottom trawl fisheries

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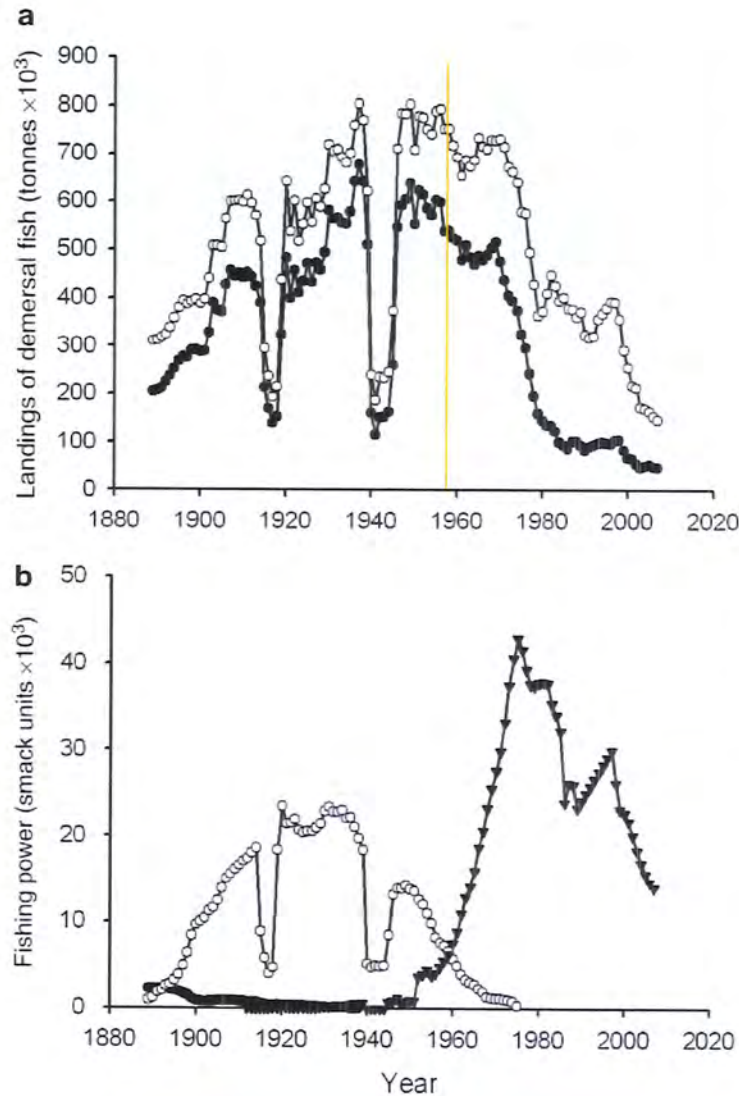
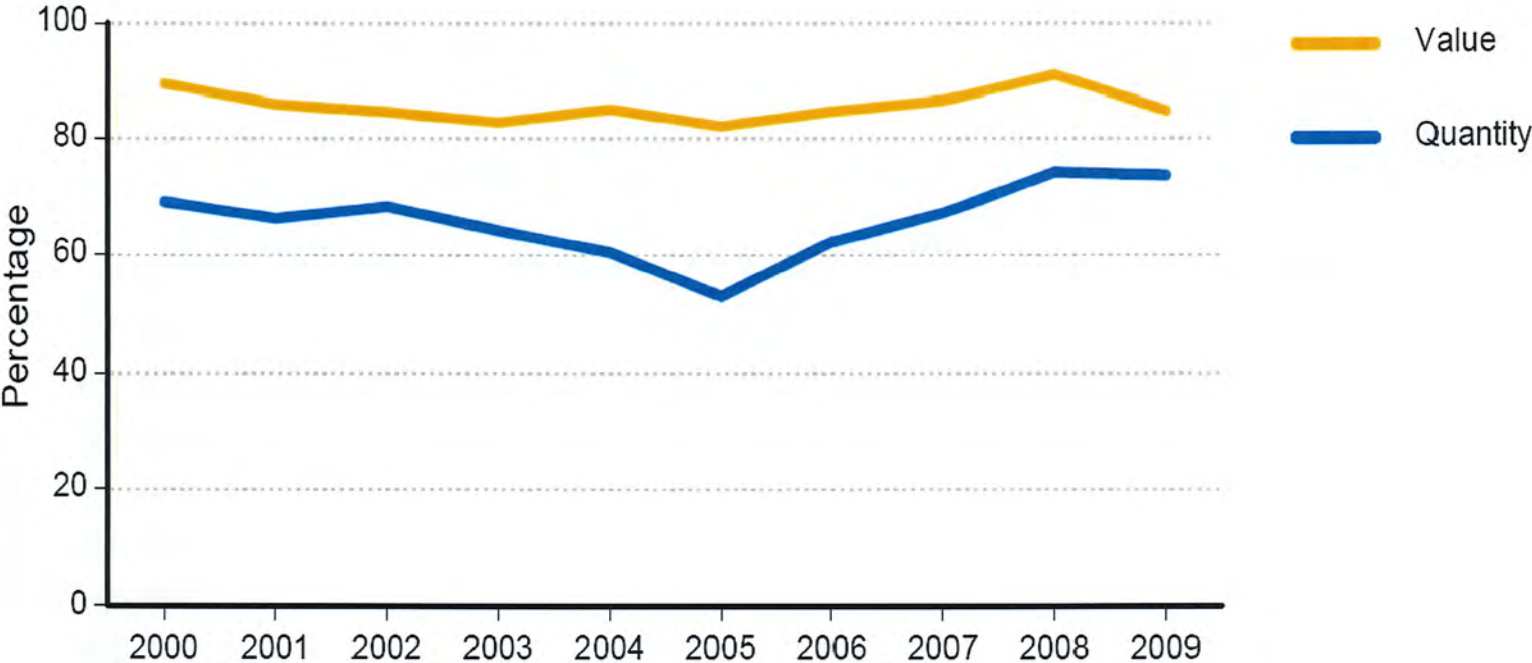


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Proportion of UK landings into the UK from sustainable sources: 2000 - 2009



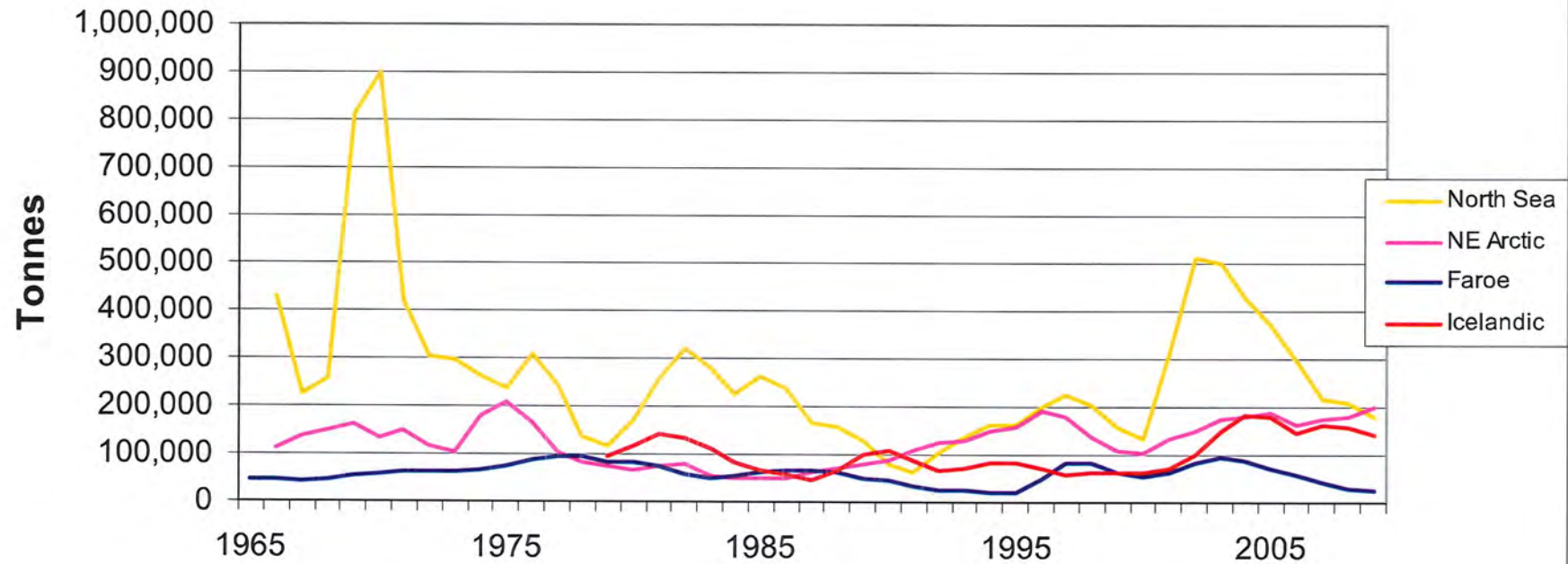
(source: MMO 2010)



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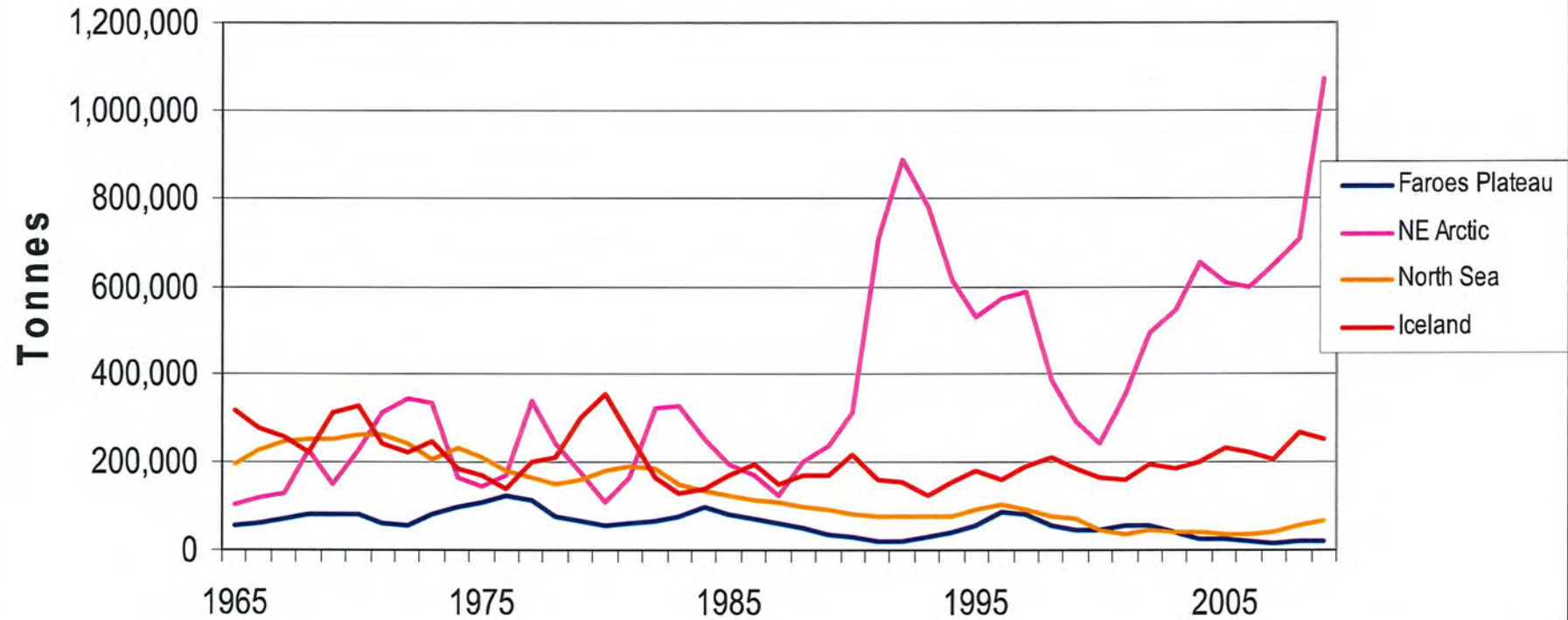
Haddock - spawning stock biomass 1965-2009

(data: ICES 2010)

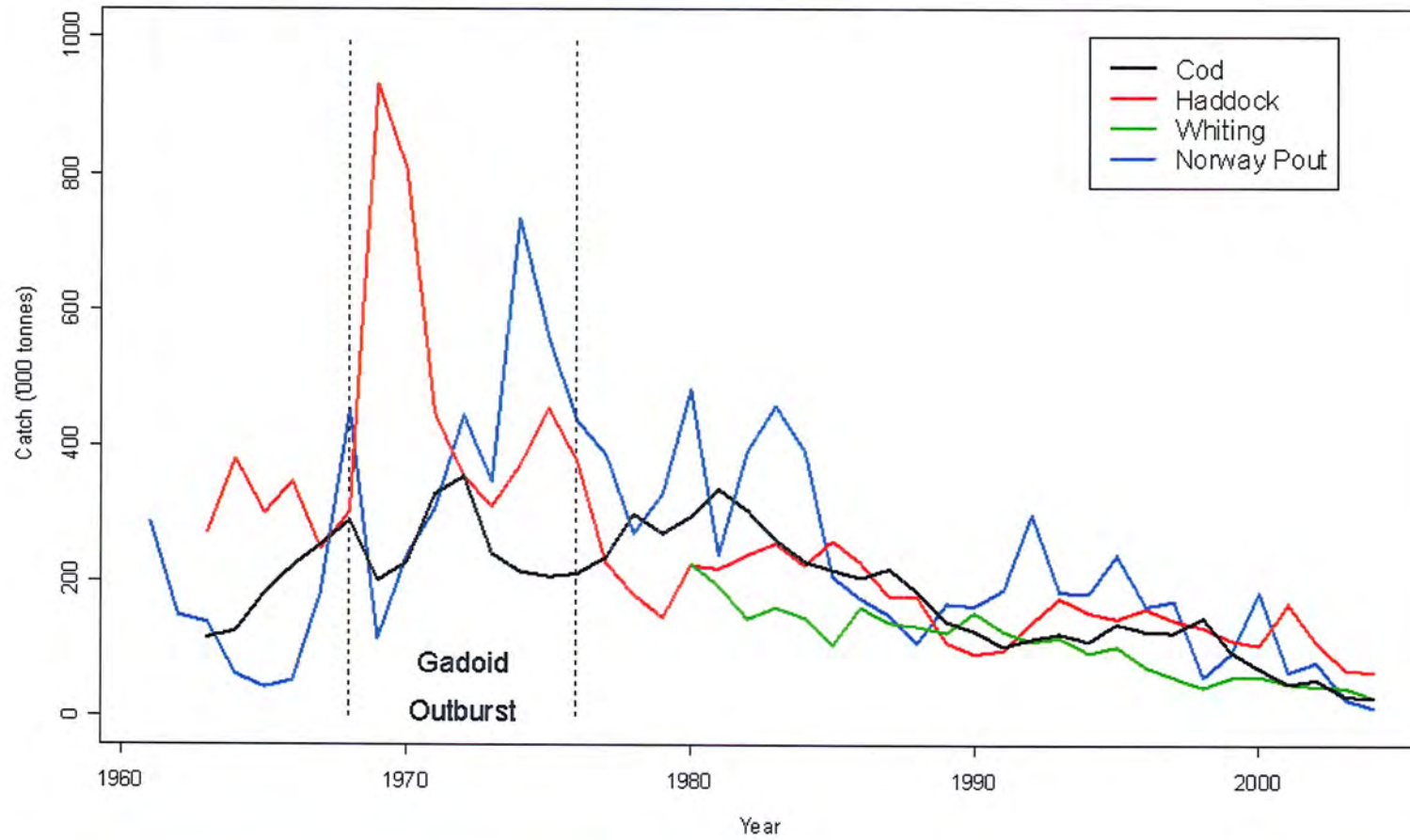


Cod - spawning stock biomass 1965-2009

(data: ICES 2010)



The Great Gadoid Outburst: N Sea spawning stock



UK foodie mantra:

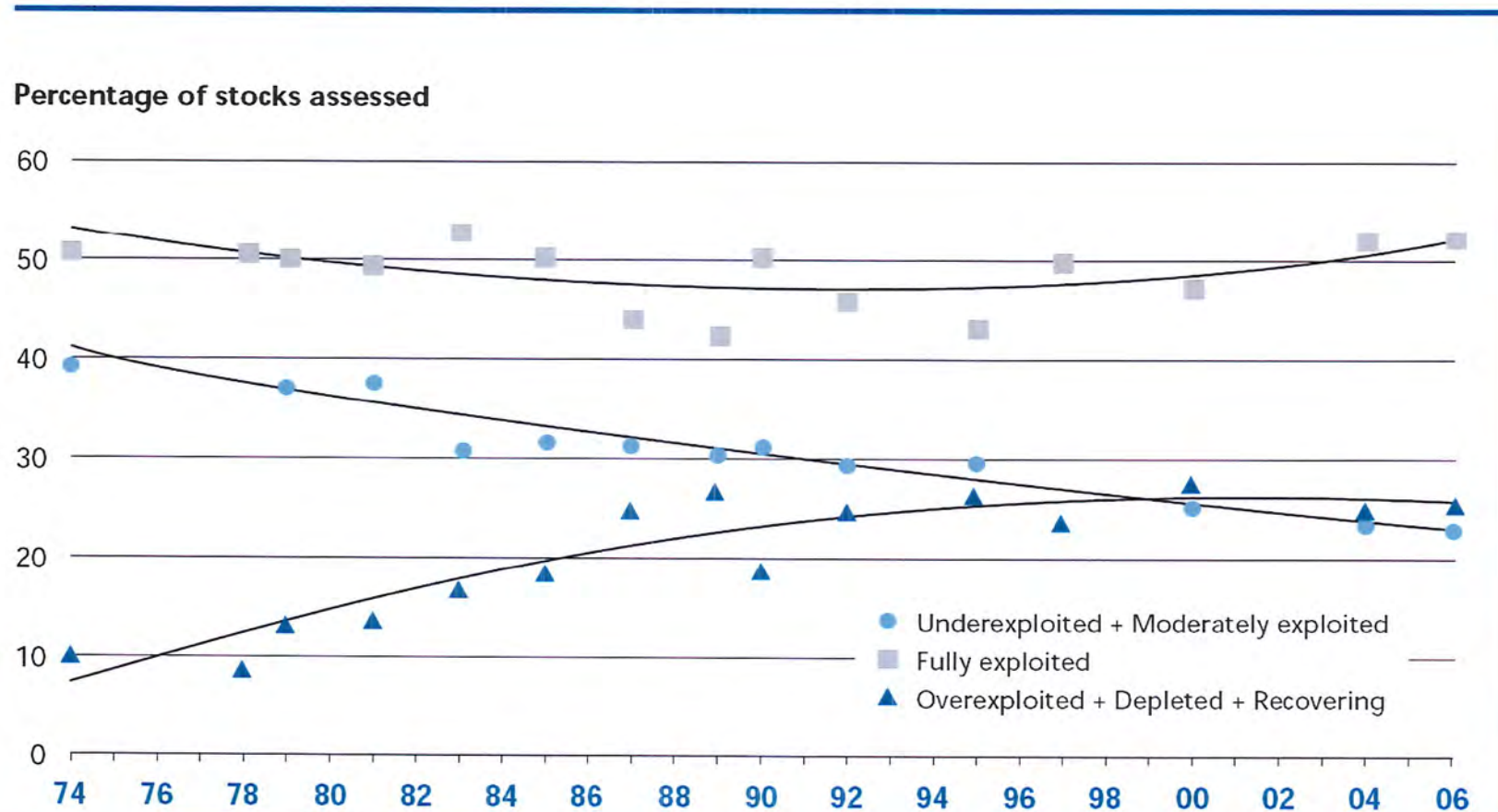
‘...of course I’d never eat cod these days...’

(advice from ‘expert on seafood sustainability’, Times newspaper [UK], 2010)



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Global trends in world marine stocks since 1974 (FAO 2006)



where are we now?

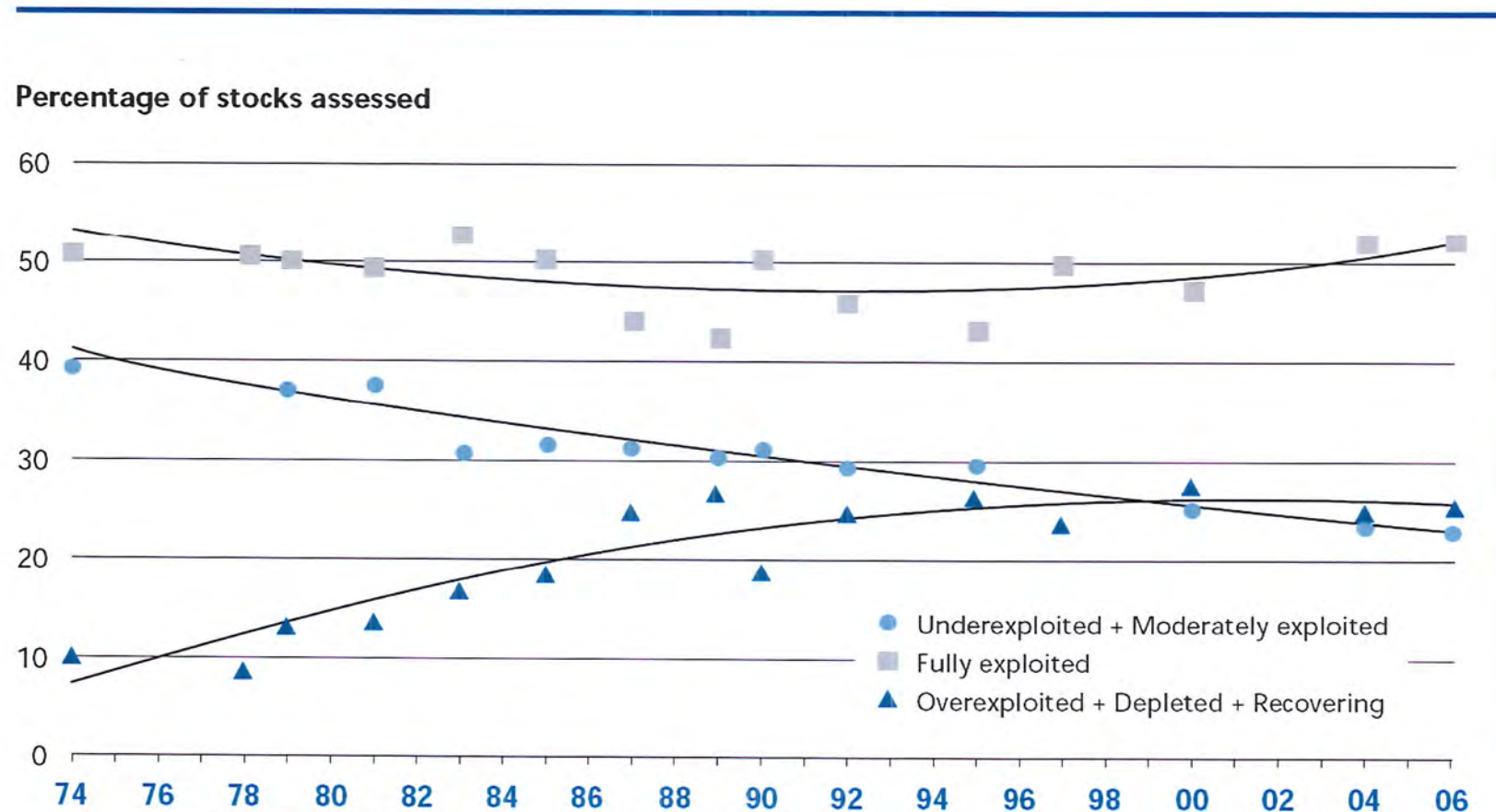
stocks & supply (version 2)

“Over-fishing is emptying the seas - today's industrialised fishing practices exceed nature's ability to replenish the ocean's fish stocks. According to the United Nations, 71-78 per cent of the world's fisheries are 'fully exploited', 'over exploited' or 'significantly depleted'. Some species have already been fished to commercial extinction; many more are on the verge.” (Greenpeace 2008)

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Global trends in world marine stocks since 1974 (FAO 2006)



Tilapia production (aquaculture)

~7% increase 2004 – 05

>2 million tonnes/\$2.5 billion



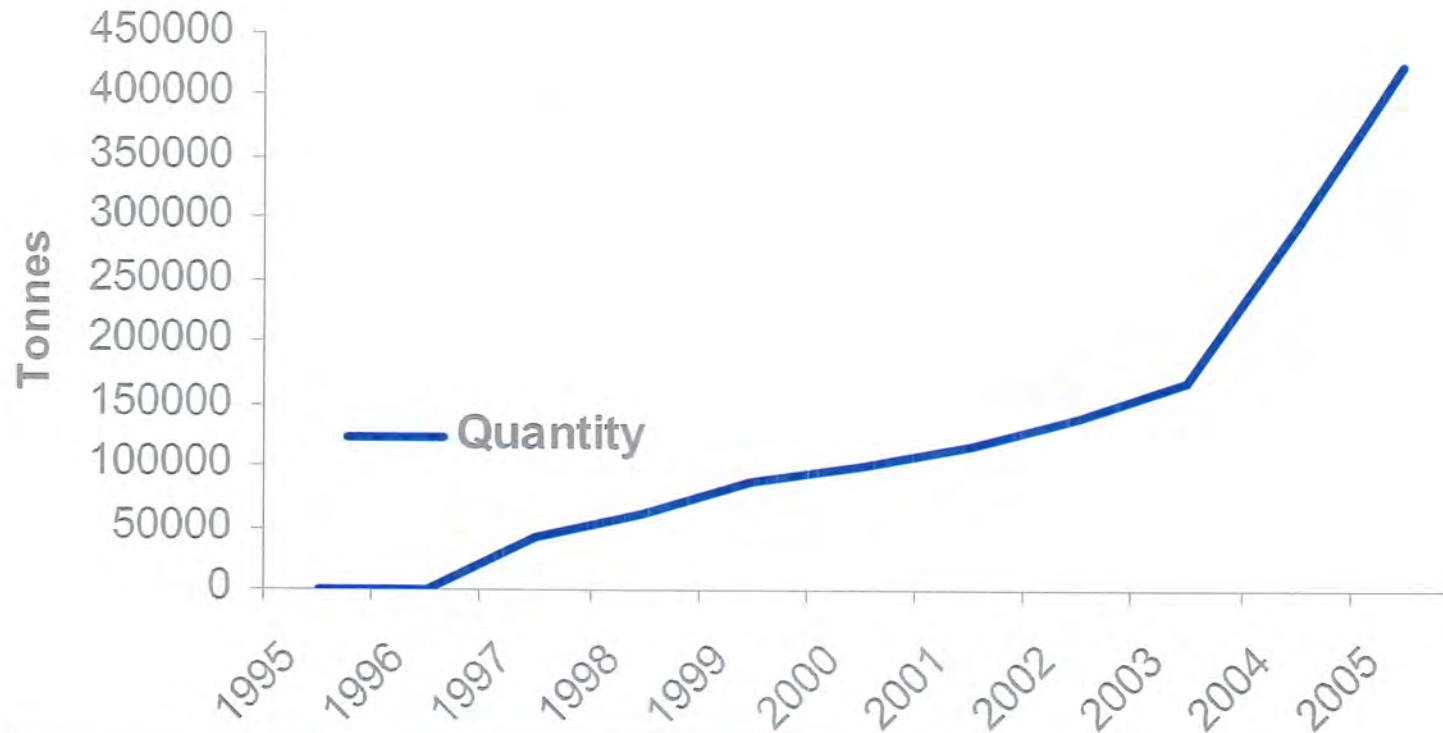
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Pangasius (Basa) production (aquaculture)

~ 45% increase 2004 – 05

~425,000 tonnes/\$623 million in 2005

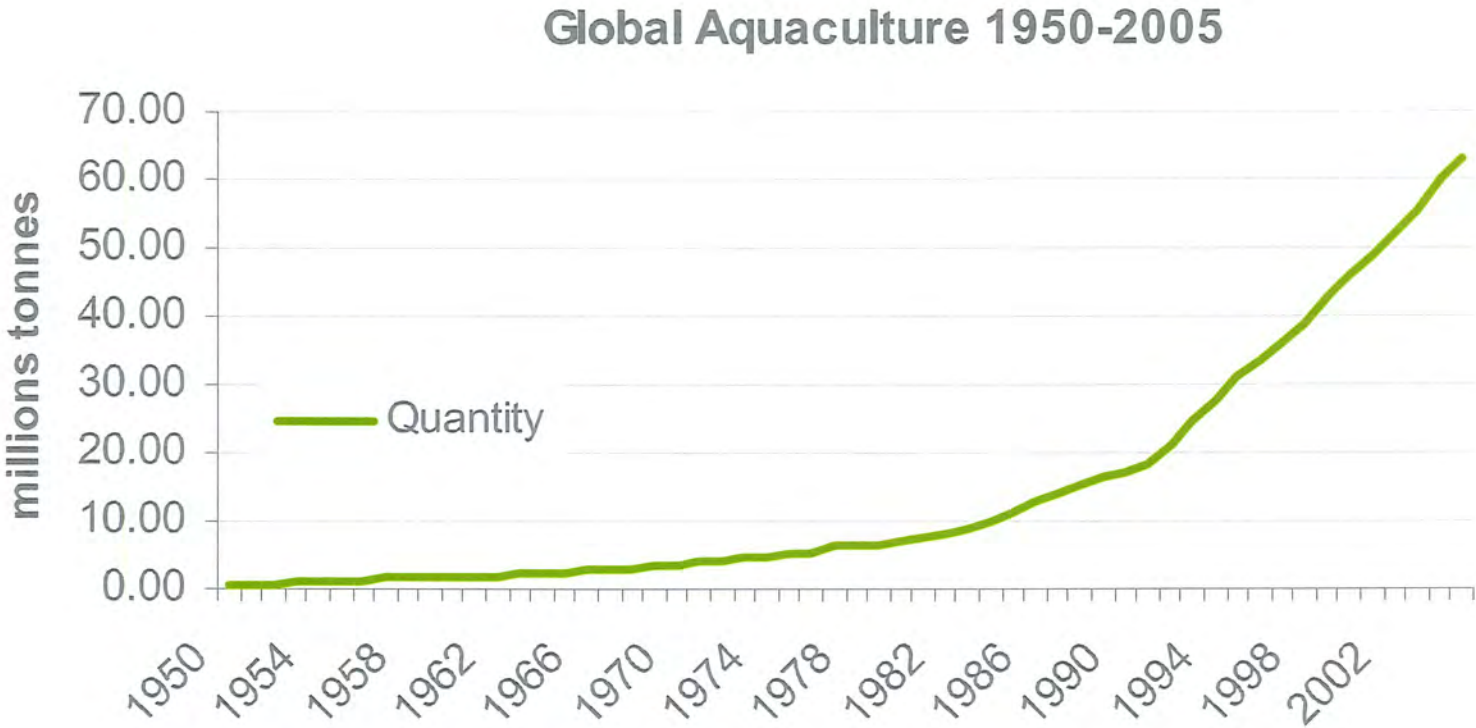
Farmed pangasius 1990-2005



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Global Aquaculture 1950-2005

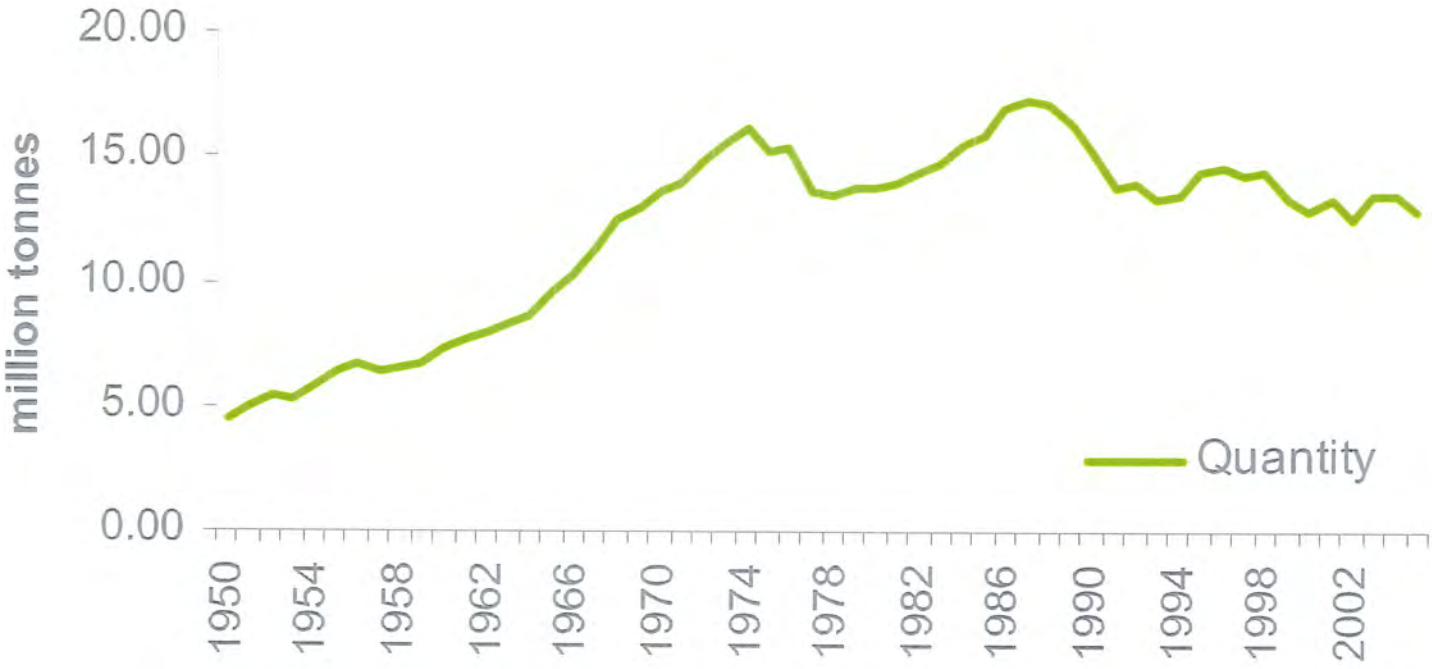
~70% increase in ~10 years



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Global white fish capture (source FAO 2006)

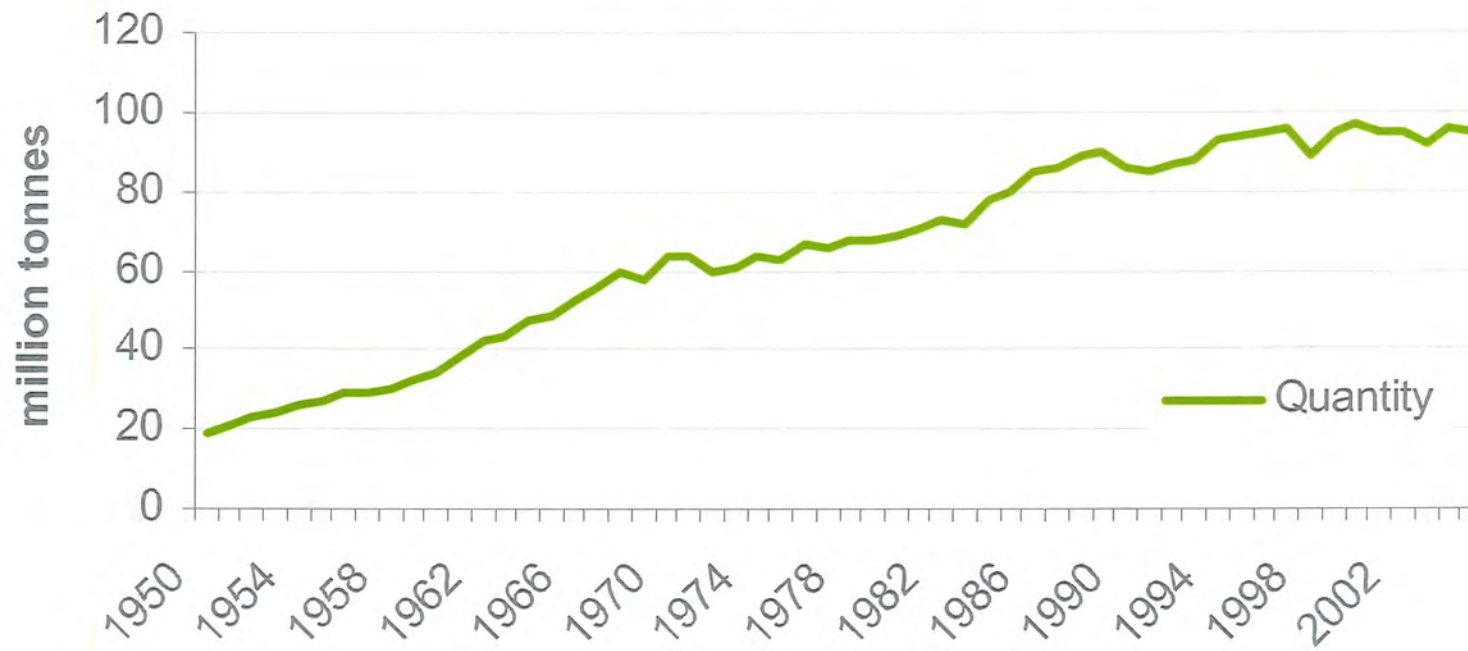
Global white fish capture



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Global capture (source FAO 2006)

Global Capture 1950-2005



where are we now?

stocks & supply (version 1)

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who can we believe . . . ?

FISH

WILL STOCKS LAST?

defending OCEANS
GREENPEACE

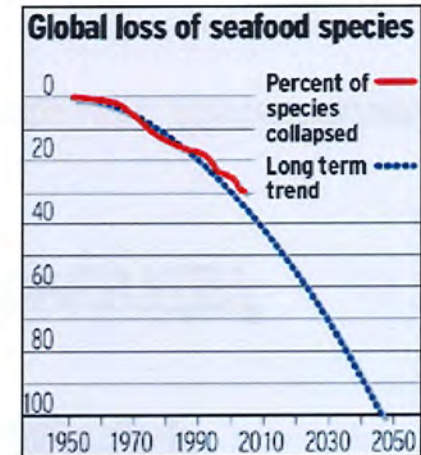
No.1
worst fish
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More reasons NOT to shop at



Morrisons trash the oceans to fill their shelves

GREENPEACE



No more fish to eat in 40 years

Study warns that all seafood stocks will have collapsed by 2048

By Richard Black
Environment correspondent, BBC News website

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who are the ~~the~~ 'legitimate' stakeholders?

anyone who can influence events!

(keep your friends close...)

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line-caught?



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Line-caught?

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Salmon?



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where do consumers place their trust?

*I don't understand
what I could do.*

*The
supermarkets
must check
these things*



*Surely it
wouldn't be on
the shelf if it
wasn't ok to
buy*

*Why should I worry
about it?*

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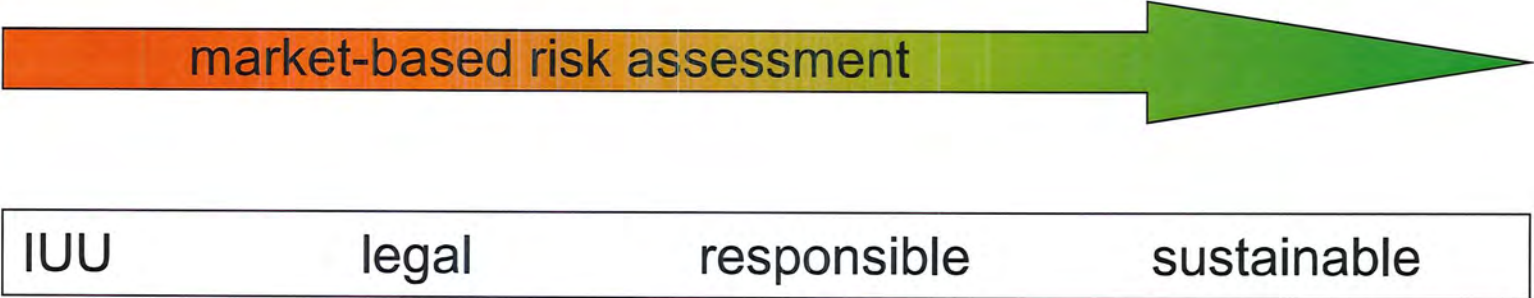
changing times



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changing times



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changing times



supporting the seafood industry for a sustainable, profitable future

changing times

supply led



demand led

closed sector



multi-stakeholder

prescription



hybrid systems

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changing times

supply led



demand led

closed sector



multi-stakeholder

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changing times

supply led



demand led

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keeping 'the industry' in 'the fishing industry':

who are the 'legitimate' stakeholders?

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Management advice

scientific process

- national institutions/labs
- fishery independent data (scientific surveys)
- fishery dependent data
- collation, analysis and advice by ICES (under contract)
 - time scales & confidence?

political process

- EU 'relative stability', 'allocation keys' & bi-laterals
- EU STECF
- Commission advice
- need for certainty
- Council of Ministers (27)
- European Parliament
- TACs → national allocations

Legislative obligations

(a partial list of hard law)

EU marine strategy framework directive

EU maritime strategy directive

EU water quality framework directive

EU marine spatial planning directive

EU fisheries control regulation

EU fisheries data collection and management regulation

EU IUU fishing regulation

EU common fisheries policy

UK marine act

UK habitats, etc regulations

UK wildlife & countryside act

UK countryside & rights of way act

UK registration of buyers and sellers act



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Commitments

(a partial list of soft stuff)

Convention on biological diversity

CITES

Migratory species *securing the future*

Wetlands

MARPOL

UNCLOS

Kyoto

OSPAR

UN Millennium Goals

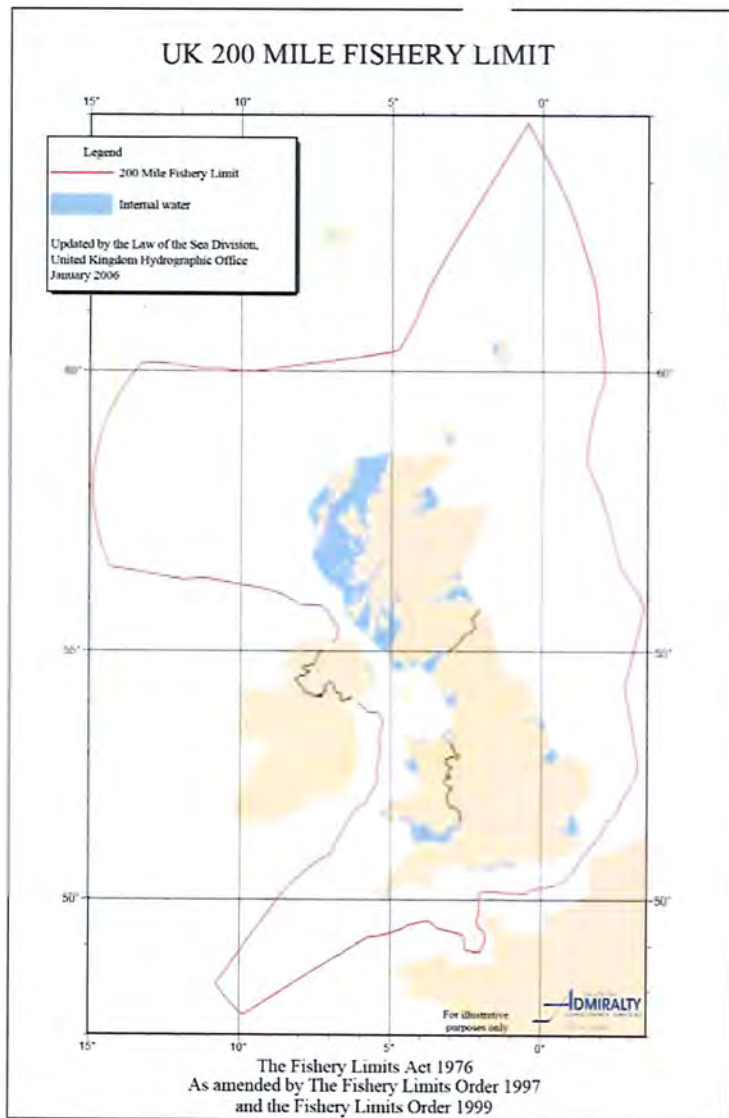
UN Environment Programme

Natura 2000

IUU fishing



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- 3, 6 & 12 mile limits
- devolved administrations
- inshore, national & UK regulations
- over-riding & over-arching EU legislation
- EU Commission
- EU Council of Ministers & Parliament
- micro-management
- reviewing the CFP
- expecting regionalisation

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Management competence



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UK seafood economy

multiple retail sector

£2.85bn/87% of total retail

foodservice

£2.8bn – fish & chips = 1/3 total

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UK seafood economy

Over 30,000 direct jobs

- Catching – 12,500
- Processing – 15,000
- Fish farming – 2,500

plus ~15,000 depending indirectly on
seafood

= 45,000 people, plus families, etc



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UK seafood economy

fleet of ~ 6,500 boats

- most >10m
- 10m-12m sector very significant
- catch of 600,000mt/£630m
- export 475,000mt/£1.15bn

imports of ~720,000mt/£2.2bn

supporting the seafood industry for a sustainable, profitable future

Our focus now is on

- Working consultatively with industry
- Working in three key areas
 1. Responsible sourcing
 2. Increasing sales revenue
 3. Reducing costs

supporting the seafood industry for a sustainable, profitable future



Statement of environmental policy

Seafish is committed to the efficient and sustainable harvesting of those resources on which the UK seafood industry depends and the protection of marine ecosystems

Seafish is committed to the development of marine aquaculture based on sustainable resource use and best environmental practice

(Seafish statement from 1996)

supporting the seafood industry for a sustainable, profitable future



Seafish is

- NOT a representative body as such
- an advocate for all sectors
- a strategic advisor
- a useful interface
- an R&D agent

- ***FUNDED BY A LEVY***



supporting the seafood industry for a sustainable, profitable future

Seafish is:

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***Seafish* is the UK authority that works with everyone in the seafood industry, from the catchers at sea to the retailers on land, to help them sell more seafood and keep consumers happy**



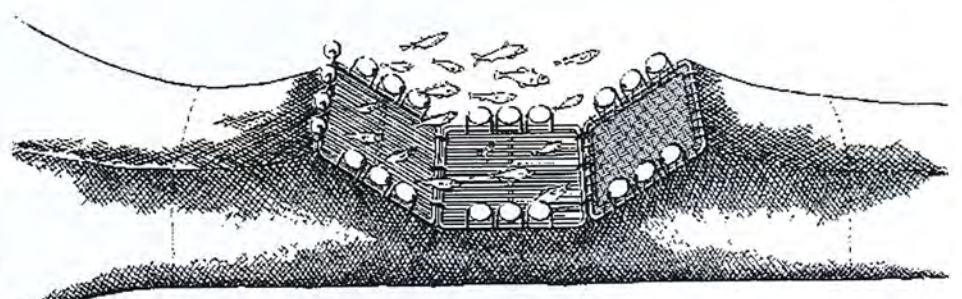
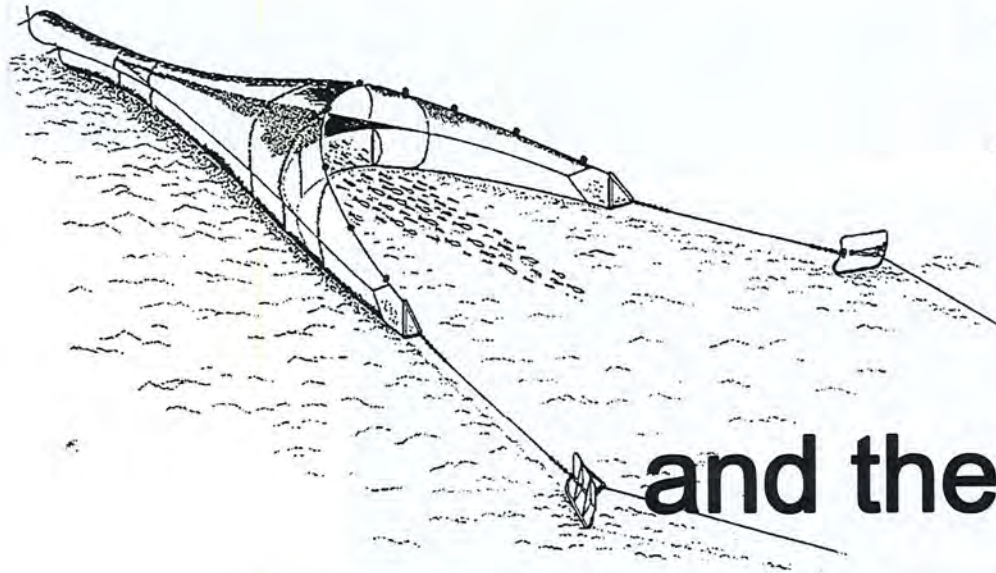
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the Sea Fish Industry Authority – statutory duties under the Sea Fisheries Act 1981

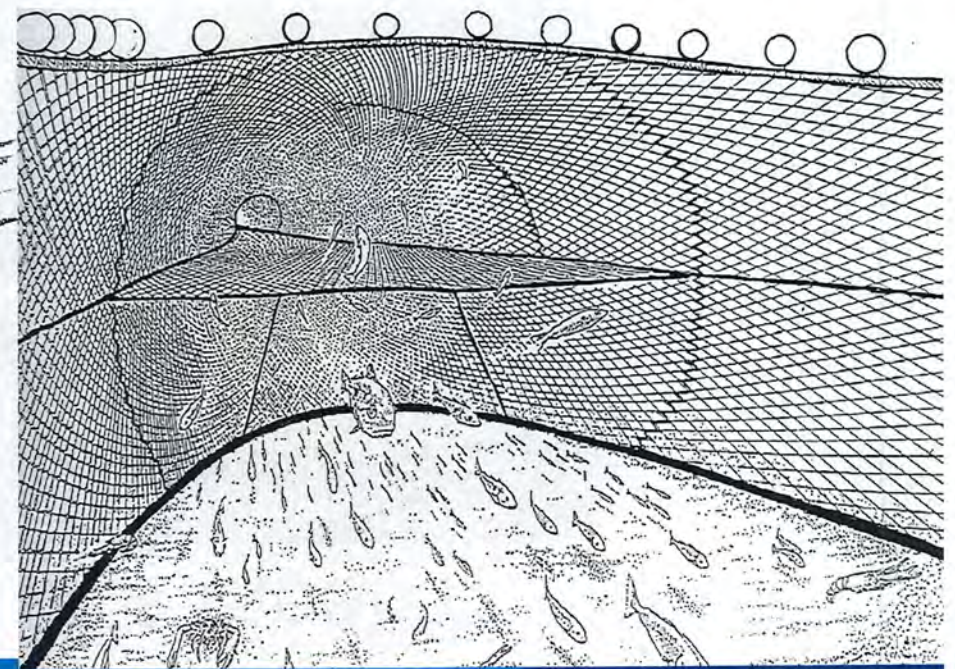
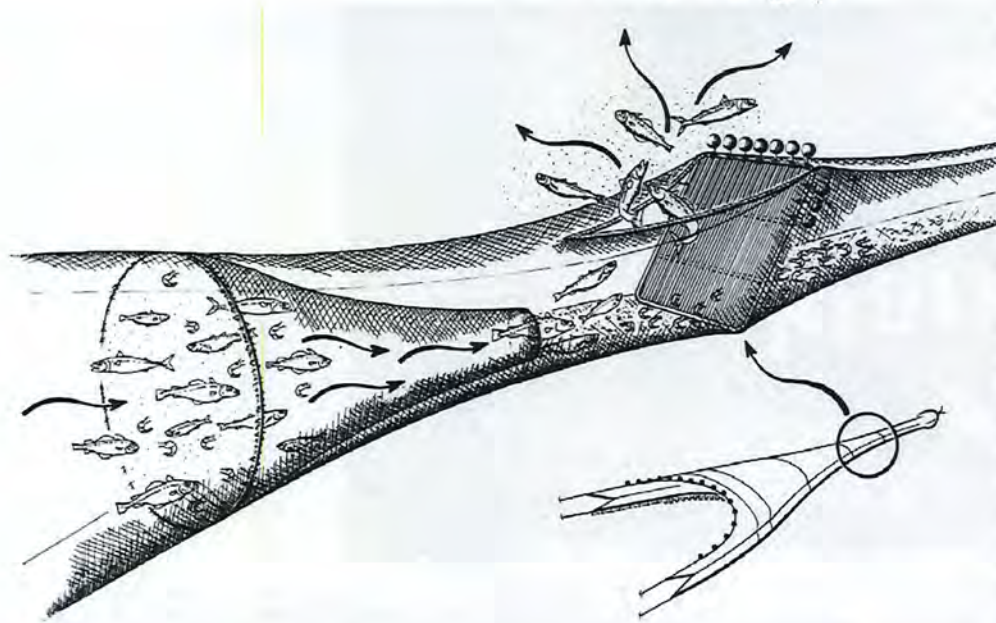
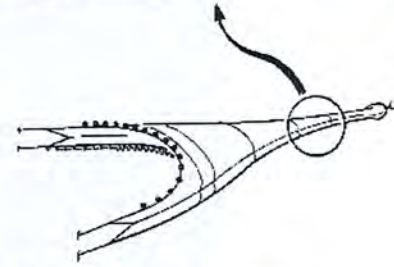
To promote the efficiency of the sea fish industry so as to serve the interests of that industry and have regard to the interests of consumers of sea fish and sea fish products.

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and then...



First ever reports on square mesh?

Buckland, 1876

&

Holt, 1886

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SEAFISH
the authority on seafood

First ever reports on square mesh?



first used in legislation in 1986

The benefits?

- poor data on fishing mortality
- over-complex management
- some of the worst stock levels in the world
- little incentive to use better technology
- continuing waste from discarding
- industry under pressure from all sides
- uncertainty over the future

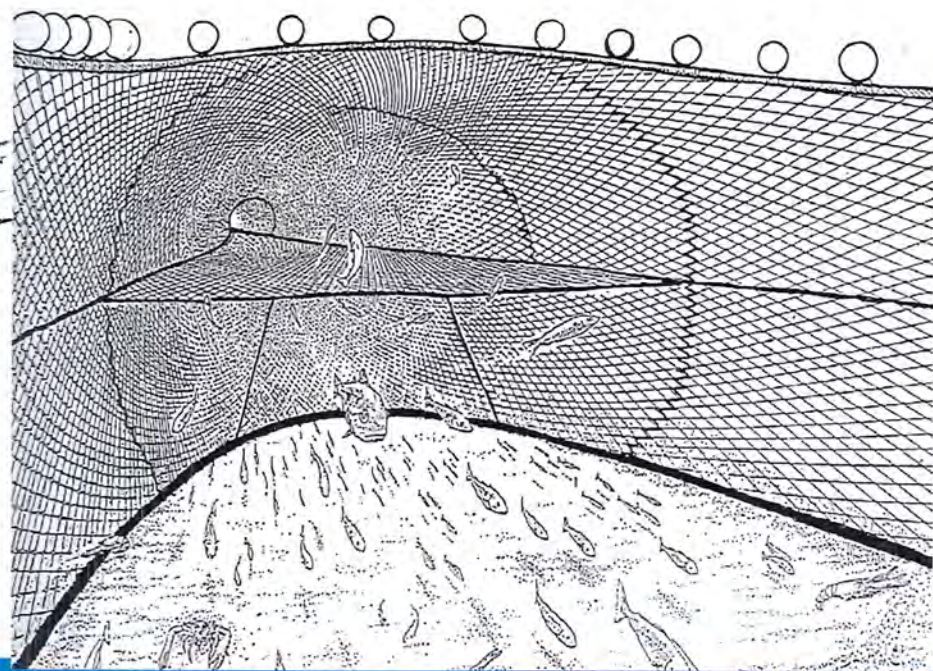
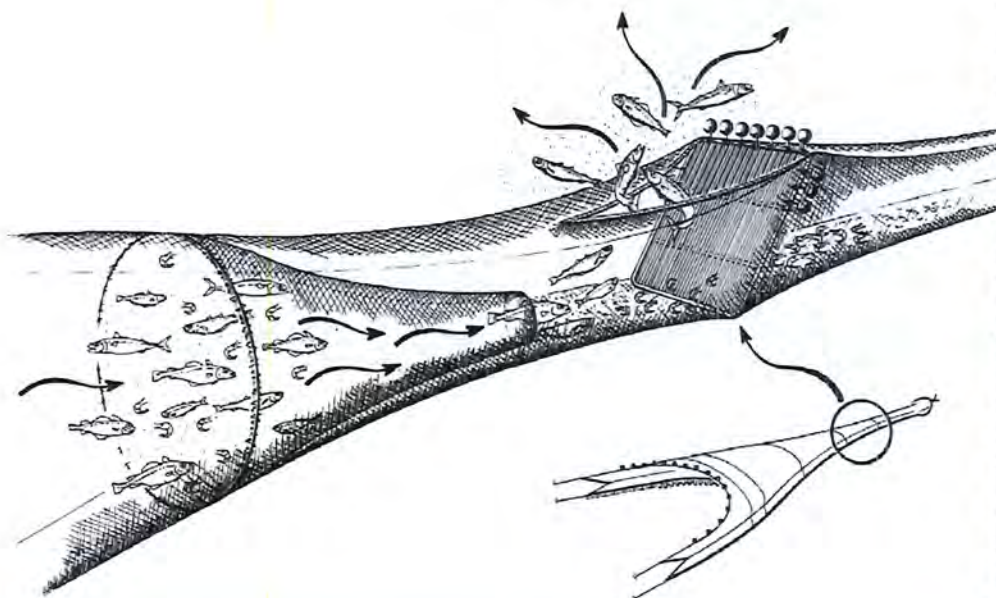
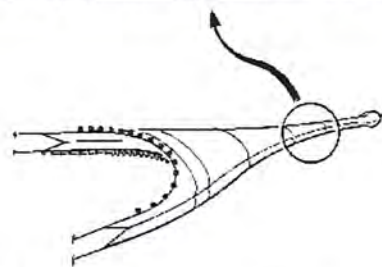
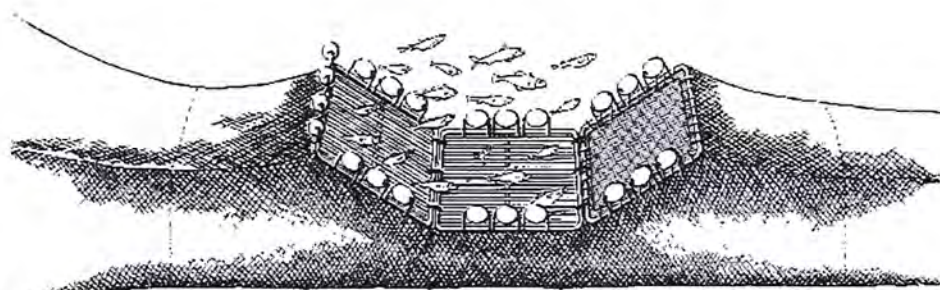
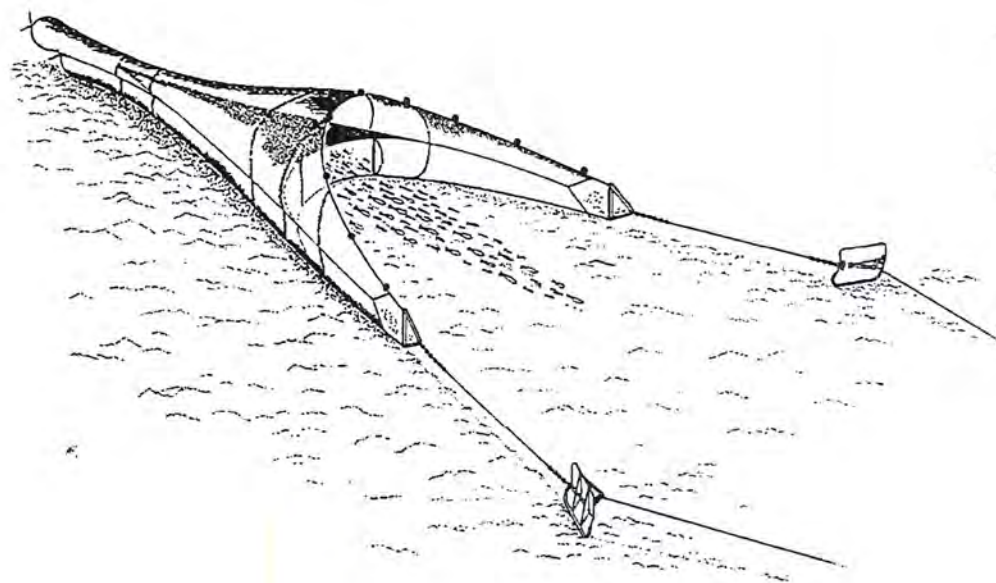
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What we had then (c 1990)

- Longest tradition of sophisticated fishery management in the world
- 25-30 years' research into more selective gears



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supporting the seafood industry for a sustainable, profitable future

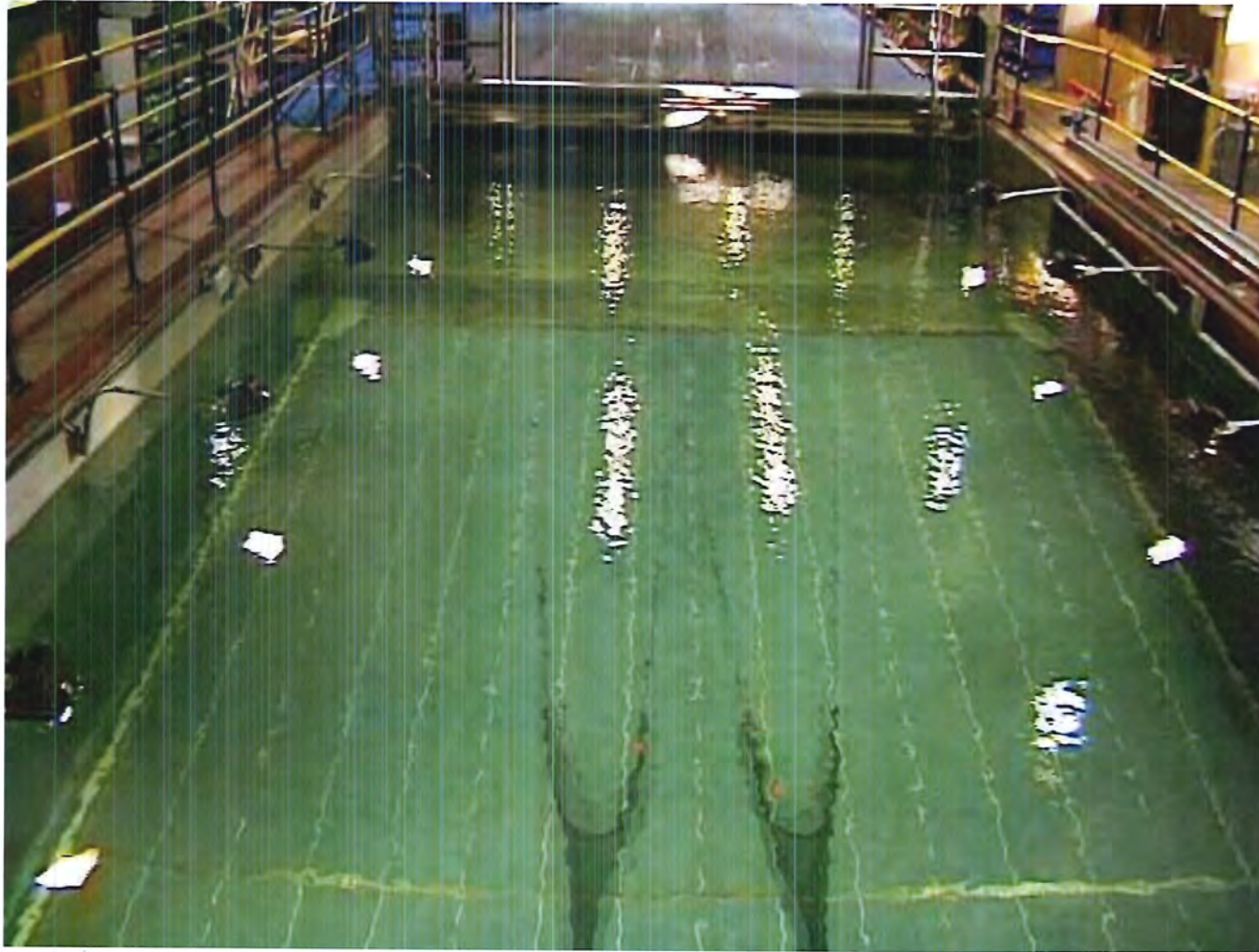
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Engineering sea trials



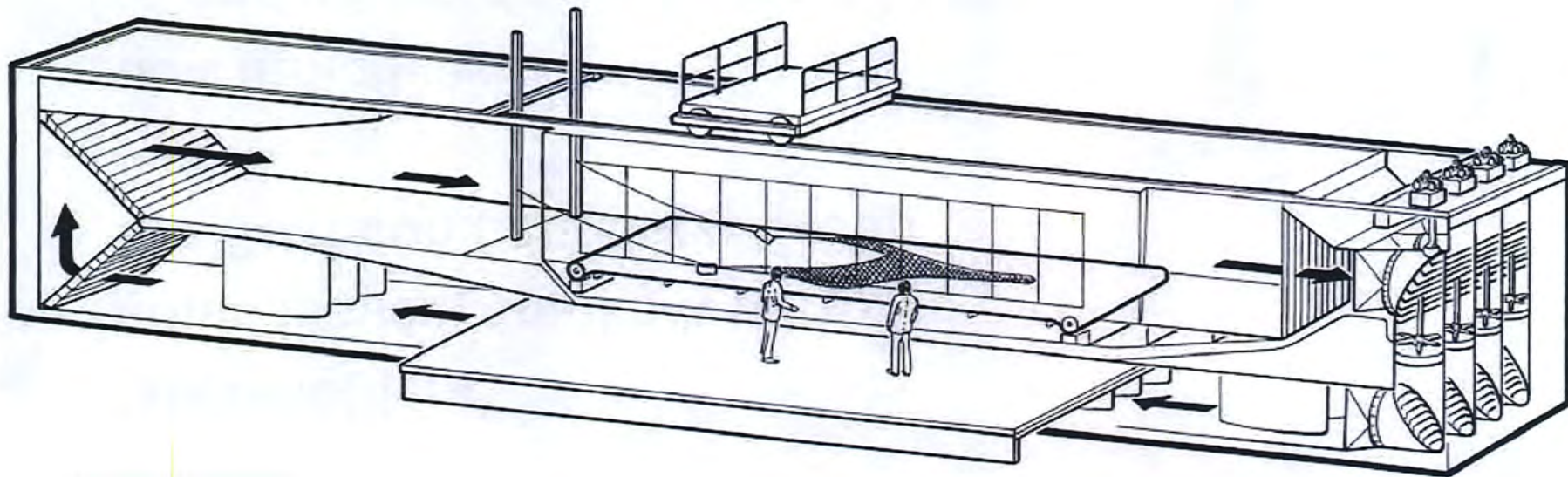
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Covering:

- **Seafish**
- **the UK seafood industry**
- **UK & European policy**

- **'stakeholders'**
- **some issues, smoke & mirrors**
- **the Common Language Group**

- **new initiatives**
 - **and where do we go from here?**



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Philip MacMullen
Head of Environment

....building the consensus

supporting the seafood industry for a sustainable, profitable future



Philip MacMullen
Head of Environment

What a long strange trip it's been....

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Australian Government
Fisheries Research and
Development Corporation



Proudly Hosted The
**SEAFOOD SERVICES AUSTRALIA
NETWORK MEETING**

Wednesday, 18 May 2011
Exhibition Room, Level 1, Sydney Fish Market,
Bank Street, Pyrmont

POSITIVE INTERACTION ON ENVIRONMENTAL ISSUES

Notes

Welcome

Ted Loveday, Managing Director of SSA, welcomed all to the open invitation SSA Network meeting.

**Sustainability and the Australian Seafood Industry – Dr Patrick Hone,
Executive Director of Fisheries Research and Development Corporation
(FRDC)**

Dr Patrick Hone, Executive Director of FRDC welcomed all and gave an overview of proceedings. Sustainability is the core plank on which we all work.

**Introduction – Grahame Turk, Managing Director Sydney Fish Market Pty Ltd
(SFM)**

Good fisheries management strives for sustainable harvests. Australian fisheries are managed sustainably; however there is a need for Australian fisheries managers to promote that fact.

Although other food commodities do not seem to require ecolabels; the promotion of ecolabels for fisheries and aquaculture by various organisations around the world is causing consumers to become confused.

Even though there are good definitions of sustainability such as those promoted by the UN and the FAO, the organisations promoting ecolabels do not agree on sustainability criteria. Ecolabels are a major impediment to consumers purchasing sustainable seafood. Some environmental NGOs are making unscientific claims that are befuddling consumers, and leading to grocery chains taking actions that are not based on the science.

Sustainability is critical to SFM and the Australian fishing industry – we need agreed sustainability criteria that are publicly accepted, audited and acted upon. We should only need one label 'Australian Seafood' to know that the seafood is harvested sustainably.

SFM has undertaken a number of marketing initiatives to address the issue of the public perception of Australian seafood's sustainability; however, the Australian seafood industry has to be more proactive in this area.

(Refer attached presentation.)

Rebuilding public support for commercial fishing in NSW: not so simple, not so hard - Duncan Leadbitter, Fish Matter Pty Ltd

Duncan's current project (referenced in the title to this talk) is on how industry manages public perception. Fisheries are a public resource, and public opinion is critical to maintaining access to the resource. Because past surveys of public opinion have been limited in their scope and sporadic, they are of limited use with respect to commercial fishing.

General concern about the environment and the management of natural resources has grown over the last few years; along with access to vast amounts of information. People appear to have lost faith in resource management agencies - environment agencies and scientists have more credibility than fisheries agencies. A partnership approach is the way forward.

Access restrictions and reallocations have been around for many years, but have accelerated in recent years. Industry's voice has not been strong due to lack of organisation, unwillingness to allocate funds to the issues, inability to engage customers beyond traditional factors, inability to make information available to interested parties in accessible ways, and an inability to form strategic alliances. Efforts to engage customers (voters) have been sporadic in time and space, and disconnected. There have been lots of missed opportunities.

The main elements of a strategy for moving forward are around building TRUST:

- Creating and maintaining networks
- working with local communities, NGOs and the recreational fishing community
- Ensuring that credible and accurate information is up to date and easily accessible by the community
- Transparency and openness – engaging people
- Credibility – avoiding greenwash
- Capitalising on success

It is all about building a wider community dialogue.

Not so simple:

- Maintaining and funding independent organisations
- Cultural transitions – acknowledging and working with the new norms
- Transparency and acting on management needs
- Collaboration and seeing the big picture
- Earning support not assuming it

Not so hard:

- People love their seafood, it can carry messages
- A lot of information is available – needs to be made accessible and up to date
- Networking and relationship building costs very little. Commitment and patience are free
- Existing systems are underutilised

(Refer attached presentation).

What is sustainable? A scientific perspective - Professor Robert Kearney, University of Canberra

Sustainability is not well defined, despite Wikipedia's definition that 'sustainability is the capacity to endure'. This ambiguity suits some stakeholders.

Only one species of fish has gone extinct in Australia, and this was not from fishing. Compare this result with Australia's on-land record: there are over 27 species extinct, with many more species heading in the same direction. Worldwide, there has not been one fishery recorded as extinct. In Australia the grey nurse shark in NSW is seriously depleted, and a lot has been done to address this problem. But what has been done may not be enough and the need to be truly cautious where real problems are identified must be acknowledged. It is critical that we do not disguise the truth. Currently the public is being told not to eat orange roughy which has only ever been fished in 12% of its distribution. In the fished area there are a 100 million orange roughy. It is unquestionable that the species is sustainable.

Yellow fin tuna is another example – found over all the world's tropical oceans. Australia's stock of yellowfin tuna is extremely lightly fished, but again we are being told not to eat because it is threatened. An irresponsibly incorrect assertion. You could not fish out this fishery with known technology. A study of prawn trawling in Clarence River study could not find any impact on the bottom. By contrast, agriculture starts with clearing the land, fertilising and introducing non-native plants and animals and preventing any native animal or plant from making a comeback. Of the 104 NSW fished species, only 4 are listed as overfished and it is most unlikely any of these four are under serious threat from fishing. Fisheries in Australia are sustainable; and recovery programs for overfished species have been proven to be very successful. Fisheries management in Australia is in its infancy. Improvements in fisheries management are happening very quickly.

Fisheries Management is not difficult. Some Australian fisheries still have problems in the areas of bycatch, habitat impacts and overcapitalisation, and these must be addressed. Industry must be careful and its actions must be based on science.

The demand for seafood in Australia is accelerating – people are demanding more seafood for health and lifestyle reasons. Australia imports 70% of the seafood consumed here. India and China are becoming more affluent, and they are prepared to pay more for quality product. Australia will need to have more fisheries fully fished and preferably none overfished. Terminology is a huge problem for this industry. Overfished – does not mean for all time. Australia's fisheries are not overfished.

Correct and accurate labelling of species as sustainable is expensive – those paying for it believe it delivers an advantage in the marketplace. Those products not labelled as sustainable are incorrectly being assumed to be unsustainable. Certification is expensive and not necessary in countries where the fisheries are generally very well managed and approved by governments as sustainable. Listing species as sustainable is inappropriate in Australia; it is not necessary and actually counter-productive. If something is found to be unsustainable, fix it. For example in NSW of the 104 species that have been assessed only 4 were considered 'overfished'. It would be more than 20 times cheaper to certify the overfished species than the well managed ones and the Government already does the assessments. It is a no-brainer: list the few fisheries that are unsustainable as unsustainable; nothing else needs to be labelled. If fish are being sold legally in Australia they are sustainable. EPBC Act on top of numerous fisheries management acts and generally good fisheries management ensures this.

Threats to access are big issues – not just to the catching sector but also to consumers. Activists campaigning against all forms of fishing, and the selfish short term focus of some people in the industry are threats. We need to ensure that short term interests of some individuals in the catching sector do not detract from long-term seafood security.

FRDC VISITING EXPERT: Mr Phil MacMullen, Head of Environmental Responsibility, Sea Fish Industry Authority in the UK

UK Seafish was established under legislation promulgated in 1981. UK Seafish is:

- NOT a representative body
- an advocate for all sectors
- a strategic advisor
- a useful interface
- a R&D agent
- Funded by a levy

Around 1990 the UK fishing industry had the longest tradition of sophisticated fishery management in the world; underpinned by 25-30 years' research into selective fishing gear. However, the legacy of that heritage was:

- poor data on fishing mortality
- over-complex management
- some of the worst stock levels in the world
- little incentive to use better technology
- continuing waste from discarding
- industry under pressure from all sides (“walls of death” depiction of the fishing industry)
- uncertainty over the future

In the face of mounting negative public sentiment UK Seafish saw the need to build consensus between disparate groups; with a supply chain approach being the key.

It started with a statement of its environmental policy: *Seafish is committed to the efficient and sustainable harvesting of those resources on which the UK seafood industry depends and the protection of marine ecosystems.* Recognising that legitimate stakeholders include anyone who can influence events, UK Seafish set up the “Common Language Group” that:

- is made up of fishers, merchants, processors, wholesalers, retailers, foodservice, NGOs, regulators
- is issue-based:
 - seafood scoring systems
 - discards
 - beam trawling & seabed impacts
 - IUU fishing
 - fish meal
- demands accountability
- identifies highest common denominator
- builds understanding
- develops consensus positions
- results in supply chain confidence

- is involved in the following activities:
 - Responsible Sourcing Guides
 - Seafish 'guides to....'
 - Skate & Ray Group
 - Discard Action Group
 - Certification & advice schemes
 - Responsible Fishing Scheme
 - Marine Conservation Society
- For a given issue may typically take the following approach:
 - identifies that 'it's not that simple'
 - convenes 'supply chain' forum
 - untangles issues
 - discusses possible solutions
 - reaches consensus and resolution
 - safeguards significant jobs
 - builds new relations and confidence

The Common Language Group builds consensus between disparate groups to ensure supply chain sustainability; by using knowledge, communication, traceability and consensus to build supply chain confidence.

A proliferation of fish sustainability schemes has been accompanied by:

- increasing consumer confusion
- industry concern
- retailer guardedness
- a reduction in confidence

resulting from inconsistent approaches and contradictory advice.

In response, UK Seafish established the Fish Sustainability Information Group whose report identified seven key attributes (aligning with FAO guidance) that all schemes must address in order to mitigate these problems:

- Scope;
- Accuracy;
- Independence;
- Precision;
- Transparency;
- Standardisation; and
- Cost-effectiveness.

UK Seafish is also working consultatively within industry using the Responsible Fishing Scheme, which unlike MSC accreditation, is a low cost option for fishers. It provides an independent, audited assessment of the application of good practice by a vessel skipper and crew in their fishing operations. The scheme is:

- FAO-based
- BSI-mediated
- generic and vessel specific
- NOT an indication of 'sustainability' (cf MSC)
- recognises best practice
- raises awareness
- offers fishery-specific 'add-ons'
- becomes a condition of supply

The fishing industry is gradually

- becoming 'givers', not just 'takers', through stewardship
- accepting monitoring
- providing compliance evidence
- monitoring activity
- monitoring status
- generating data
- becoming co-managers
- learning to live together

(Refer attached presentation; and www.seafish.org.uk .)

PANEL DISCUSSION: 'The way forward', facilitated by Dr Patrick Hone

Philip MacMullen, Seafish
 Professor Robert Kearney, Uni of Canberra
 Professor Colin Buxton Uni Tasmania
 Duncan Leadbitter, Fish Matter Pty Ltd
 Grahame Turk, SFM

Workshop an Action Plan for the Australian industry

Common language

Need clear understanding of all terms - fully fished, over fished etc. Few fishers, and even less of the public, know what the terms mean – need a common language known by industry and public. Bob Kearney suggests changing terminology entirely to be more commonly accepted, eg finance terms. A well managed fishery is balanced; an overfished fishery is in deficit, an underfished one is in surplus. The goal in most Australian fisheries is to fish the initial biomass down at a level of between 20% and 40% at which point the productivity of the population is maximised. It is generally accepted that at 30% of original biomass the fishery is well managed.

Significant amount of time explaining to journalists what the definitions actually mean. After explaining, stories don't get in the paper because the journalists are confused or they accept that there is not a problem and therefore no story. Industry needs to get consistent message out.

Governments spend a lot to get the message out when it suits, but not when it doesn't. Is this on purpose? Duncan believes governments deliver messages in a really boring way. Public need to know how to look for information and interpret large and technical amounts of information. Victoria and Queensland actively promoted fisheries that went through EPBC accreditation. UK government position is defensive and communication not seen as role of government.

Developing effective alliances

Michael Harte of WWF was asked his thoughts on alliances. He advised that WWF want to work with industry with those parts that want to work well. Main mechanism of making things happen. A partnership such as UK would be welcome. Stakeholders should be able to move from group to group – government, NGO and industry.

Lowri Pryce of OceanWatch asked, Can you see parallels between UK and our work in Australia? Phil MacMullen advised that Seafish deals with practitioners, as well as representatives of organisations – need to get base population to uptake. Need to bring along grass root and generically promote fish.

Chris Smyth of Australian Conservation Foundation (ACF) advised that one of the issues why governments are not getting information out is they are nervous about interpretation. Partnerships and common language would be welcome.

Recent announcements about WWF and Coles about a species of shark that Coles no longer sells were made with no consultation with industry. Need to include industry.

Do we need to create an institution to handle this issue, like Seafish? Duncan Leadbitter thinks it is more about outcomes and building a system that meets the criteria. Colin Buxton believes we need a seafood industry peak body that is an industry champion, working in support of all sectors of the industry. Grahame Turk advised that there is a lot of confusion out there and NGOs can influence fishing practices etc. Good to hear ACF and WWF are happy to work together with industry.

Phil MacMullen advised that there is currently an OECD program investigating how MSC influence policy. If governments are discharging responsibilities effectively OK but need to check influence. At OCED FAO conference, one message was they won't be supporting philanthropic schemes that indirectly try to dictate policy.

David Thomason, Australian CRC, with history in meat and livestock, is pessimistic about role of philanthropic organisations – it is about what consumers want. Effective is heart foundation tick. He thinks there needs to be a standard to which seafood industry is able to certify sustainability.

Geoff Gorrie advised that forestry industry has only two certification schemes in the world - in fisheries there are 50 schemes. Too difficult to operate in multitude of markets. Idea of common language group is great. It would be delightful if industry could have one single voice in these matters.

Michael Gardner, QSIA believes working through a common language group would ease political uncertainty. Recent situation in Queensland where RIS had to deal with the issue of over-fished snapper, Minister enforced a closure, recreational fishers did not accept the closure and Minister lost portfolio.

Geoff Blackburn, Oceanwatch Director and fisher believes the Australian seafood industry is struggling for answers and the issue comes down to funding. Reality is fishermen do not come to these forums as they lose money. It does not improve the fisherman's income. We are failing in communicating to our stakeholders. How is the levy collected, by who and how is it accounted for? Phil MacMullen advised that a team of 4 levy accountants are appointed who have the power to check any company's books to ensure Seafish is getting correct levy by weight. The UK market is dominated by big supermarkets. The people who pay levy cannot always pass on the cost to consumers. But they do get value for money. There is a UK government will to support the seafood industry.

Patrick Caleo of MSC advised the forum to listen to your customers. If you don't like schemes like MSC, see what has made them successful. David Pollard noted that Patrick had a point. Who is there to talk to? If we ask supermarkets what they want, we might get a different answer.

Malcolm McLaughlin advised that his business gets asked a lot about sustainability of species. The answer is of course it is sustainable, that's why we sell it. Scientists setting quota and management should be promoting the industry's sustainability.

Trixi Madon of Commonwealth Fisheries Assoc noted that the driver is within industry marketing itself. There is an international standard for advertising environmental claims which requires third party audit.

Renata Brooks, FRDC Director advised that the organics labeling issue was only resolved by industry getting an Australian standard which defined organic. That might be an avenue worth pursuing.

Geoff Gorrie believes we could make much more of EPBC accreditation and that is one basis to move forward.

David Carter, Austral Fisheries noted that two major supermarkets are ready to declare their commitment to sustainable fisheries. It is about a supply chain. Eco labels have already left the station – the strong will survive and time will tell.

Next steps forward

Peter Dundas-Smith believes Australian seafood industry has two organisations that together capture the roles of Seafish: Oceanwatch and SSA. Look at what we want those two organisations to take up as a result of this workshop. Both are under resourced.

Ted Loveday supported the concept of an Australian standard and tie in with common language issue. SSA is an SDO with expertise. An Australian Standard for Sustainability would clarify most definitions. Sustainability must be quantifiable. FRDC has invested heavily into sustainability models, ESD etc. A quantifiable Australian standard is now needed and will capitalize on these past FRDC investments.

Bryan Skepper asked how are we going to fund this? Would the seafood promotions levy be a mechanism into the future. The meeting agreed that attempting the levy will not happen in the short term.

Grahame Turk acknowledged that all organisations have been struggling for money. We need to do something now. A couple of major players could perhaps put their hands up and get on with it. Grahame believes seafood is too cheap and consumers can pay more. 1% of SFM turnover would raise \$1 million. Catching sector is price takers, not price setters. We are talking about the seafood industry, not just the fishing industry. We include chain retailers, importers, NGOs – all valid players in this industry. We should be talking about common things, not the differences. He pointed out that Austral Fishing can afford MSC accreditation but a large portion of seafood industry cannot afford MSC. These ecolabels push cost up the chain and on to the consumer.

Colin Buxton believes the image problem the catching sector has is linked to information. NGO and some science information is not positive. Industry needs to make itself heard and push positive messages. Fisheries management and fisheries scientists are neither speaking up or being heard in the debate.

Bob Kearney believes we need to take a partnership approach to government and seek promotion of EPBC Act as the basis of a certification scheme.

Duncan Leadbitter noted a lot of goodwill between NGOs and others to come to common vision. We need to understand what the various players in the chain want to assist the communication aspect. A lot of information needs to be put together in a readily digestible format and made more accessible.

Patrick Hone summed up that industry has a great message and today was about how. We need dialogue to progress things with industry embracing partnership responsibility. Need to get a common language forum established with consensus approaches. It is beholden on industry to get their act together to attain get minimum agreement. He believes all industry needs to contribute to this process. Industry organisations need to discuss with their members and come back with a plan including funding. He noted that SSA funding stops on 30 June 2012. Patrick thanked the panel members for participation.

Overview of main speakers points:

- language and terminology;
- develop effective alliances within and between stakeholders – willingness to work with industry is main mechanism for change. Transparency in engagement.
- Work across supply chain;
- Secure resourcing / funding
- Take ownership / responsibility
- Ensure information – trusted sources – open and transparent.

Grahame Turk expressed appreciation to FRDC for bursary, and to SSA for organising, to Philip MacMullen for the trek and Mark Boulter for the initial idea. Challenge is for SSA to continue the role of coordinating and getting the gaggle together. This will continue at Seafood Directions 23-25 October at Gold Coast www.seafooddirections2011.com.au.

Geoff Gorrie thanked all for their participation. The next Network will be held in conjunction with Seafood Directions on 26 October. The SSA Board has determined the theme of 'social licence to operate' and continuation of today's discussions for that meeting. SSA hopes to be here post 2012.

National Round Up of Industry Development Activities

Sydney Fish Market / NSW Seafood Industry Council – Bryan Skepper

- Industry licence to operate and sustainability debate most pressing issues.
- NSW reviewing FRAB process with the objective of industry assuming responsibility for the administration of the FRAB, encouraging industry to take more interest in its research agenda.
- Marine park issue, when they did GBR they fishers were encouraged to divulge information on vital fishing areas but this trust was abused and vital fishing grounds were closed to commercial fishing. In the more recent SW Marine Park it has been claimed that a similar situation has occurred. The trawl industry nationally has to be on notice.

Queensland Seafood Industry Assoc (Michael Gardner)

Michael gave an overview of recent activities.

Northern Territory Seafood Council / NSIA (Katherine Sarneckis)

- Recent research with consumers is showing that there is confusion when the word "local" is used on menu's. NTSC is working with restaurants to alert them to labelling opportunities to promote NT seafood.

- Caring for our Country project is underway jointly with OceanWatch SeaNet officer – improving fishing practices of which the review of EMSs has a strong emphasis on public perception and licence to operate.
- NSIA – Coles/Woolworths/WWF policies which came out earlier this year NSIA is engaging with the organisations to investigate if there are opportunities.
- NSIA – working closely with SEWPaC on Marine Bioregional Planning to try and minimise impacts on industry. SW plan came out three weeks ago. It is expected that the NW, N and E draft plans will have completed their consultation period by the end of 2011.

Tasmanian Seafood Industry Council (Neil Stump)

- The Tasmanian State government doing it tough – progressing an economic development plan EDP. Neil is on the Food Industry Advisory Committee. All food industries have some things in common. One of the key actions flowing from the EDP is an audit of regulation on an industry by industry basis. One other proposed action linked to the EDP is an audit of branding across Tasmania, including the food industries.
- The maintenance of Tasmanian's biosecurity status also remains a high priority of for industry.
- The government is supporting a major expansion of the Salmon industry in Macquarie Harbour on the west coast. All the major industry players are working collaboratively on the major issues associated with the expansion.
- As part of a national approach to food safety the Tasmanian Government has released draft food safety legislation for public comment – For the seafood industry the major concern is that the legislation will simply add another layer of regulation with more fees and without delivering improved food safety outcomes.
- Review of rock lobster rules – The review of the management plan for rock lobster is being conducted (as mandated in the principle legislation) in a period where the rock lobster TAC has been cut by a third over last 3 years due to recruitment issues. There is general agreement that there has been a decline in recruitment to the fishery, particularly on the east coast. These are difficult times for the industry and the review of the management plan is just another issue industry has to grapple with.
- TAFI the principle fisheries research agency in Tasmanian for the last 12 years has been absorbed within a new, larger research body at UTAS, IMAS – The key task for industry is to ensure industry requirements are delivered in relation to research outcomes and outputs are still effectively delivered by the new institute and that the focus is not purely on "blue sky" research.
- Industry infrastructure – Management of marine infrastructure remains fragmented. However the two major service providers Marine & Safety Tasmania (MAST) and TasPorts are working together trying to establish one cost centre which will assist in the reduction of duplication and wastage.
- The training landscape is fragmented – even well resourced companies are finding the training landscape confusing. Industry is hopeful that some of the increase funding for training in regional Australia announced in the federal budget will flow through to the seafood industry.

Seafood Industry Victoria (Ross McGowan)

- Announcement that Australian Conservation Foundation sustainable seafood project had successfully judged Port Phillip Bay and Corner Inlet southern calamari and King George Whiting as sustainable products. Easter media coverage as a result was good. Snapper is currently undergoing the same process.
- NSIA – Ross attended FRDC research providers network significant work by research providers for university capacity to provide research activities in certain areas. Priority setting process.

- National Extension and adoption strategy for seafood industry extremely complex across the nation – work in progress.
- Melbourne Fish Market is leaving existing premises – will result in two fish markets with split by major operators.
- Victorian FRAB has formally been restructured and is now hosted by SIV.
- Ran successful industry awards with new Minister for Primary Industries, Food Security and Water.
- Rock lobster, giant crab and abalone – stock-assessments of stocks. Work being undertaken to standardise catch rates for Rock Lobster fishery – hugely complex task.

Western Australian Fishing Industry (Angus Callander)

- CEO Anna Cronin has resigned and has taken up a new position as an Advisor to the Victorian Premier.
- Rock lobster industry is showing signs of recovery, after some better than expected Peurlis data in the past few months.
- Peak body funded by industry levy – change with new Minister – looking at strategic planning meeting soon to move forward perhaps as seafood representative body.
- Recent announcement of south West Marine Park with 90 day consultation period. Outcome disappointing as areas gazetted for Multi Use and Special Use were not discussed during the negotiation stage with industry.
- WAFIC is in the process of strategically reviewing the Organisation where the focus will be to broaden the remit to include a much greater focus on aquaculture and post harvest activities.
- Developing Strategic Plan as peak body for seafood in WA (broader than just producer).
- Lobster output control system (quota) now showing good results. Discussion ongoing to full quota next season
- Labour shortage – mining boom Mark II – training will become an issue.
- Acknowledge that WA attended climate change symposium in Brisbane in March with good outcomes.
- National harmonisation of labour.
- How to unify – undoubtedly have to put hand in pocket to become significant and relevant – need national body.
- SSA is extremely important to bring the seafood industry together.

Wildcatch Fisheries SA (Jonas Woolford)

- State marine park process is a big issue at present. Road shows where fishers and businesses talk about socio economic impact. Hopefully come up with something much more agreeable to industry.
- Indigenous issues not progressing.
- Worksafe SA under review.
- Review new Fisheries Act – provide more licence security (10 year issue instead of annually).
- Wildcatch SA – since amalgamation of wild fishery sectors – not attracting a lot of funding – no major projects
- We have a project through cost recovery process for things identified in strategic plan.
- PIRSA and Aquaculture have amalgamated again – savings in that.
- Snapper fishery in marine scale is going to go quota.

WINSC (Julii Tyson)

Julii gave an overview of recent activities.

OceanWatch (Lowri Pryce)

Lowri gave an overview of recent activities.

SEA (Angus Callander)

- WAFIC has EMDG approved body status and participated in 2011 European Seafood Exposition in Brussels. Over 1500 exhibitors.

CFA (Trixi Madon)

Trixi gave an overview of recent activities.

SSA Update (Ted Loveday)

- Over last 12 months we have had many reviews – FRDC mid term review, Board-commissioned communication and ID study and SSA prospectus. Prospectus maps out where SSA sees the future. Out of Prospectus we are developing FRDC project expressions of interest.
- FRDC Board has made it clear they will not fund on a business plan basis. They want project by project approach. We are working through this process. Also working on a project to provide some core funding and other project applications for FRDC Board consideration.
- One project is Trade and Market Access (which works very successfully with cooperation from Lynda Feazey, AQIS). Need to work with industry to understand it is not about companies selling fish but access issue for whole of industry.
- Our Network meetings will be themed in future and applications submitted on a case by case basis.
- The success of SSA applications to FRDC are dependent on industry support for the proposed activities. Let FRDC know if you want to support SSA. Email FRDC and pass on your support.
- Join SSA as a member.
- Australian seafood brand should be available at the end of year.

In response to request, SSA can provide names and emails of those registered on website who attended today's meeting.