

Seafood

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International

Wild cod
comeback

Boston show
preview

Farmed
salmon's
future



Making a choice

Which eco-label is right
for your products?

NORWEGIAN FISHERMEN AT WORK: The country's cod quota is up 17.2% for 2009.

"I've been involved in the retail side of the fish business for the past 15 years or so and I have to say this is the most difficult period that I've ever experienced."

Jeremy Langley, Waitrose

agreement in November and ratified by EU fisheries ministers at the European Council meeting in December.

"We'd been conscious of the progress in the fishery for some time," said Rilatt, "with signs of the results emerging a couple of years ago when the resource had stopped declining and, additionally, from the ICES [International Council for Exploration of the Seas] advice of 2008, which confirmed the beginnings of stock recovery.

"Coupled with the conservation schemes and the initiative of the fishermen involved, we made the decision to come back into the fishery. We're not coming back in any great quantity – this is very much a small-scale step – but we feel that becoming involved gives us the opportunity not only to participate in the debate, but to try and make sure that fishermen who are doing things well are rewarded and can have access to the market through us."

Waiting game

When it comes to the impact of a resurgent North Sea stock at a consumer level, other leading U.K. players are more circumspect. For Jeremy Langley, specialist fish buyer for premium retailer Waitrose, which in 1999 ceased buying North Sea cod and switched to Icelandic supplies, there is little incentive to rekindle an old flame.

"We're taking a precautionary approach; we will wait to see how the fishery develops and whether quotas continue to rise, and whether stock assessments continue to be positive," he said.

"However, an important issue for us in terms of our overall sustainability policy is fishing methods. We're looking for methods that minimize fuel costs, and at the moment line-caught fishing is where we are. I'm not aware of any line-fishing boats in the United Kingdom at the moment fishing for cod, but one never knows what might happen in future. It's a challenge I've laid on certain people's doorsteps before: if you can come up with some line-caught fish,

we'd most certainly consider it."

Waitrose's Icelandic Prime Cod Loins are its No. 1 selling cod line, Langley said, and demand is as strong as ever. However, he said predicting the future of the market in 2009 has never been more complex.

"I've been involved in the retail side of the fish business for the past 15 years or so and I have to say this is the most difficult period that I've ever experienced. We're getting so many different financial factors coming into play at the same time, and that makes it even more challenging, and more exciting, too, of course."

Room for maneuvers

In 2009, suppliers certainly will see more raw material available and landed in the Barents Sea, home of the North-East Arctic cod stock, the largest in the world.

"The Norwegian cod quota is up 17.2 percent for 2009, from 237,100 metric tons to 241,996 metric tons," said Karin Olsen, Norwegian Seafood Export Council (NSEC) market director.

"We will certainly be fishing more cod in 2009, and it will be very interesting to see how the market will react to that."

Price and volume reduction in 2008 for

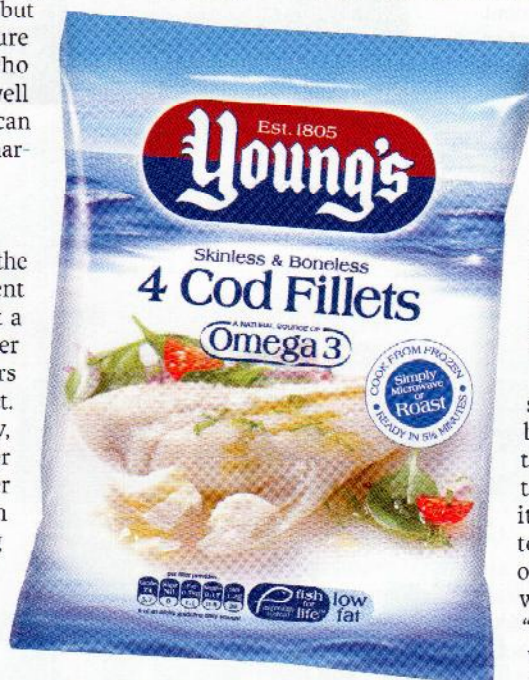
most Norwegian cod products resulted in the total value of codfish dropping from 2007, Olsen said, but Klaus Hatlebrette, financial analyst at Norwegian bank DnB NOR, believes 2009 could see the beginnings of a turnaround.

"While I'm not sure that 2009 will be a better 2008 in terms of price, in terms of total value it's definitely going to be higher because of the higher volumes we will see," he said.

"In 2008, the overall wild cod catch, including the Barents Sea catch, the North Sea catch and other local landings, was 710,000 metric tons,

but we wouldn't be surprised to see it go to 790,000 metric tons round weight this year, which is a big increase.

"What we have noted is that more expensive products have fallen in price, with consumers looking toward cheaper products – we saw this especially in the second half of 2008 for cod – and this is one of the main challenges facing the industry. In addition, credit issues certainly contributed to the sizeable price cuts in December 2008, and while this trend will continue for a while, when the financial crisis improves we should see buyers becoming more willing."



BACK ON THE SHELF: Young's lifted its moratorium on North Sea cod purchases, saying the stock's status has improved.

PHOTO: JEAN GAUJAY

addressed. Throughout the last two or three years there have been concerted efforts to reduce the amount of IUU in the Barents Sea, and in the Baltic Sea, albeit to a lesser extent, and we are now beginning to see evidence of stock recovery in the North Sea, too.

"In the whole area of compliance there's been a huge improvement, and that means that from the point of view of selling cod, we have much more confidence now about supplying fish that the consumer doesn't have to worry about," he said.

In December, Young's, in characteristically forthright fashion, lifted its moratorium on purchases of cod from the North Sea in recognition of recent industry initiatives – such as the Scottish Conservation Credits scheme – to improve fishing practices.

The announcement coincided with the headline news of a 30 percent increase in the North Sea and eastern channel cod quota for 2009, rising from 22,152 metric tons to 28,797 metric tons, as decided by an EU-Norway fisheries



CUTTING THROUGH THE CONFUSION: The modern consumer is confronted by a magnificent array of fish and seafood, but how does he know he's buying sustainably? Popularity suggests the simplest route to a conscience-free purchase is the eco-label.

choosing the appropriate eco-label for many has turned into a perilous pursuit.

On the surface, it appears there's a plethora of labels available to the well-intentioned business, and while each offers something "green," picking the one that best caters to a long-term corporate strategy is neither an easy nor cheap decision.

Of those available, the more recognized and more reputable labels include Friend of the Sea (FOS), an international certification scheme for products originating from sustainable fisheries and aquaculture; Naturland, which promotes organic production and processing; Dolphin-

friendly, whereby the Earth Island Institute controls and verifies dolphins are not killed in tuna fisheries; the Best Aquaculture Practices (BAP) retail certification mark, a trademark of the Global Aquaculture Alliance (GAA) that is licensed to the Aquaculture Certification Council (ACC) for use by BAP-certified facilities; and the Marine Stewardship Council's (MSC) international fishery certification program and seafood eco-label, which recognizes and rewards sustainable fisheries.

Their ranks are swelled by several country- and species-specific labels. However, there is a common belief while governments have an

important role to play in encouraging sustainability, no country is likely to accept an eco-labeling scheme developed by another nation's government.

The MSC seal is probably the most recognized eco-label currently; the group has been developing its program for more than a decade. Worldwide, more than 1,600 products worth around \$1 billion (€734 million) now qualify to bear its blue tick.

Its position on the front of the grid was confirmed with the announcement three years ago by Wal-Mart, the world's largest retail seller of seafood, that all wild-caught fresh



cost of MSC certification is high and the process can be “complex”, its acceptance was more widespread than the competition, it said.

While consumer response has been good to own-brand eco-labels from French retailers, these do not constitute a proper eco-label, said the report.

Supermarkets Scapechc, Casino, Auchan and Carrefour have introduced their own sustainable labels, but these “create confusion and blur the message” of an eco-label, it said.

It does accept such policies show a “general strategic vision” in keeping with the way the European market is moving. But they are not compliant with the U.N. Food and Agriculture Organization’s (FAO) guidelines on eco-labels and are “more subject to marketing” than to an actual commitment to sustainability, the report said.

For its part, MSC’s board now stipulates certification should take 12 months or less.

“We have made considerable improvements in recent years,” said Howes. “We have been bringing down the time frame, and some recently-certified fisheries have only taken eight or nine months.”

The costs, meanwhile, have to be held against the benefits of having MSC and the access to certain markets that it gives, he said.

Healthy competition

So what are MSC’s and FOS’s stances on the too many thought there are eco-labels?



ECO-LABELS: The main players

<p>Marine Stewardship Council</p> <p>FOUNDED: 1997 by Unilever and WWF. Independent in 1999.</p> <p>INTERNATIONAL USE/ COVERAGE: Yes</p> <p>WILD CATCH: Yes</p> <p>AQUACULTURE: No</p> <p>COSTS: Anything between \$10,000 and \$250,000 per fishery.</p>	<p>KRAV</p> <p>FOUNDED: Unknown</p> <p>INTERNATIONAL USE/ COVERAGE: Yes</p> <p>WILD CATCH: Occasionally.</p> <p>AQUACULTURE: Yes. Primarily known as an organic certifier.</p> <p>COSTS: Unknown.</p>	<p>Best Aquaculture Practices</p> <p>FOUNDED: 2003</p> <p>INTERNATIONAL USE/ COVERAGE: Yes</p> <p>WILD CATCH: No</p> <p>AQUACULTURE: Yes. The BAP retail certificate is the GAA trademark.</p> <p>COSTS: \$500 application fee. \$3,000 hatchery/farm inspection/ re-inspection fee. \$5,000 for processing plants.</p>	
<p>Naturland</p> <p>FOUNDED: 1981</p> <p>INTERNATIONAL USE/ COVERAGE: Yes</p> <p>WILD CATCH: No</p> <p>AQUACULTURE: Yes. Promotes organic production and processing.</p> <p>COSTS: €500 annual membership.</p>	<p>Freedom Food</p> <p>FOUNDED: 1994</p> <p>INTERNATIONAL USE/ COVERAGE: No. United Kingdom only.</p> <p>WILD CATCH: No</p> <p>AQUACULTURE: Yes. Animals must be reared according to RSPCA welfare standards.</p> <p>COSTS: Unknown.</p>	<p>Iceland Responsible Fisheries</p> <p>FOUNDED: 2008</p> <p>INTERNATIONAL USE/ COVERAGE: To be used to promote Icelandic seafood overseas.</p> <p>WILD CATCH: Yes</p> <p>AQUACULTURE: Unknown</p> <p>COSTS: Unknown</p>	<p>Friend of the Sea</p> <p>FOUNDED: 2005</p> <p>INTERNATIONAL USE/ COVERAGE: Yes</p> <p>WILD CATCH: Yes</p> <p>AQUACULTURE: Yes</p> <p>COSTS: €4,000 per assessment. €2,000 per product standard yearly fee.</p>
<p>Soil Association</p> <p>FOUNDED: 1946</p> <p>INTERNATIONAL USE/ COVERAGE: Mainly United Kingdom.</p> <p>WILD CATCH: No</p> <p>AQUACULTURE: Campaigning and certification organisation for organic food and farming.</p> <p>COSTS: Unknown.</p>	<p>Fair-Fish</p> <p>FOUNDED: 2000</p> <p>INTERNATIONAL USE/ COVERAGE: Yes</p> <p>WILD CATCH: Yes. Geared to giving fishermen in developing nations access to European consumers.</p> <p>AQUACULTURE: No</p> <p>COSTS: Unknown.</p>	<p>Marine Ecolabel Japan</p> <p>FOUNDED: 2007</p> <p>INTERNATIONAL USE/ COVERAGE: No. Japan only.</p> <p>Aimed to assure supermarket shoppers they are buying sustainably-caught fish.</p> <p>WILD CATCH: Yes</p> <p>AQUACULTURE: Unknown</p> <p>COSTS: Unknown</p>	<p>IFQC – Seafood Trust</p> <p>FOUNDED: 1997</p> <p>INTERNATIONAL USE/ COVERAGE: Yes</p> <p>WILD CATCH: Is looking at the possibility.</p> <p>AQUACULTURE: Yes.</p> <p>COSTS: Unknown.</p> <p>Based on inspection and certification days.</p>

MSC's Howes said it's a popular misconception but when you boil down the whole eco-label scene and the credibility of each participating player there isn't a huge choice.

"The commercial sector wants a global label. But if you think of primary traded seafood and international coverage, there's only really two – MSC and Friend of the Sea.

"More than one credible label is good for the market. It creates competition, which keeps us all on our toes," he said.

Bray concurs, and said while there are several national labels, his theory is they will not gather momentum.

"They are geared more toward the responsible conduct of fisheries and not their sustainability. We also feel they won't travel internationally."

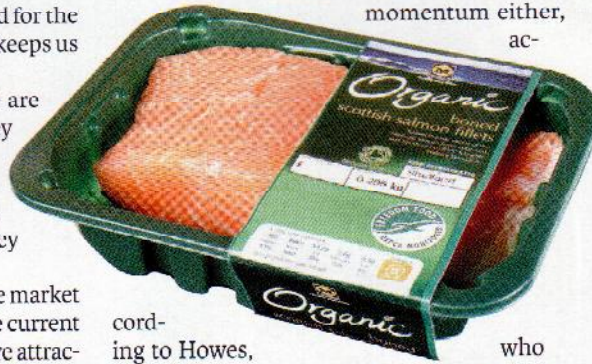
He thinks there's enough room in the market for both FOS and MSC and suggests the current economic turmoil could make FOS more attractive to potential label carriers because of the cost involved in gaining certification.

"With the high fuel prices and companies going bankrupt we don't expect to see that many fisheries spending their resources seeking certification.

"However, it's widely hoped the Obama administration will breathe new life into the whole sustainability movement. In which case, we believe the eco-label trend will not slow down. It should, in fact, increase – probably through aquaculture," said Bray.

"Companies are still contacting us with increasing regularity and hopefully they will adopt Friend of the Sea. It's up to us to show we are credible, reliable, we work according to FAO guidelines and we want to fulfill our mission of creating sustainably managed fisheries as a non-profit-making NGO."

MSC hasn't noticed any dip in its momentum either, ac-



According to Howes, who added the market will decide the direction and number of eco-labels.

"The world is undoubtedly in recession. The only questions are how long will it last, and how deep will it go? MSC is taking this very seriously. We know we have to be prudent and think very carefully about what we're doing."

Bray feels there must be a stronger drive from all labels in making consumers more aware of their existence and their work.

FOS has a strategy for addressing this but Bray admitted a lot hinges on how companies that

successfully complete the certification process promote their achievement to consumers.

Supermarket collaboration will also be paramount in this drive, he said, as will be the continued competition with MSC.

"Otherwise Friend of the Sea and MSC won't evolve or progress as we should. "Hopefully, one day we'll share common ideals and work together. Our mission is conservation and so we are open to some form of cooperation."

Sound advice

As for those enterprises looking to embrace a certification program, the important thing to remember when assessing which scheme to follow seems to be balancing the credibility they desire with the overall cost and effort it will require. A bit of homework can go a long way, said a source currently seeking certification.

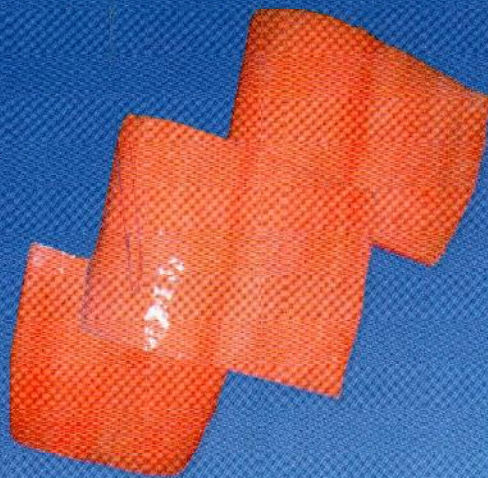
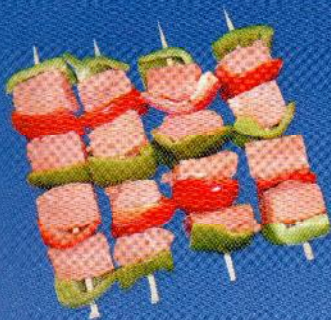
"A careful seafood business should first visualize where it wants to be positioned in the market and who it wants to sell to and then backtrack its [future] route to where it is now in order to see how much it will have to remodel its business."

In some cases, it's worth going the extra mile, while in others it could be an unnecessary use of time, said the source, especially if the business believes its green credentials stack up to close scrutiny and its customers are fully aware of them.

Careful evaluation now, it seems, could save a lot of heartache.

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ECONOMICS

Kyokuyo: prices to fall

Head of Japanese firm Kyokuyo says 2009 will be a year of consolidation and lower prices as the economic meltdown continues to spread.

IntraFish Media

President Kiyokazu Fukui is warning 2009 will have to be a year of precautionary measures to ride out the effects of the economic downturn.

"It is expected to be a year of safety and lower prices next year," the Kyokuyo chief said. "Yet, we will continue our backbone policy of purchasing the appropriate amounts at proper times, advancing our global business strategies and processing strategies."

Fukui, at the company's annual meeting, said 2008 had been a challenging year for the business.

"A slump in domestic consumption caused by the worldwide financial meltdown and stronger pressure to lower prices as a result of the dearer-yen-giveback sales at the end market indicated extreme



PHOTO: THE SUISAN TIMES

KIYOKAZU FUKUI: A tough year ahead for the seafood industry.

differences in business environment between the first and last half [of 2008]," he said.

Furthermore, safety scares in Asia were not helping to improve consumer trust, said Fukui.

"Misconducts by the industry, such as the Chinese frozen pot-sticker scandal, happened one after the other [last year], deepening consumers' concerns over food safety," he said.

SALMON

Pacific treaty is renewed

Canada and the United States have ratified an agreement on changes to five chapters of the Pacific Salmon Treaty (PST), which expired at the end of 2008.

The renewed chapters, which took effect Jan. 1, help ensure the long-term sustainability of Pacific salmon stocks while supporting an economically viable fishing industry on both sides of the border between Canada and the United States, said Canadian Fisheries Minister Gail Shea.

"Conservation and the long-term sustainability of Pacific salmon are the key objectives being pursued through the Pacific Salmon Treaty," she said.

"This is a crucial agreement that will help people on both sides of the border benefit from sustainable fishing opportunities for years to come.

"The agreement will also promote increased cooperation between our countries as we manage our shared salmon stocks."

With the ratification of the agreement by both governments, the renewed chapters will be in effect for the 2009 fishing season and remain in place through 2018.

The 10-year agreement places strong emphasis on conservation, stability of access for harvesters, and the sustainability of the Pacific salmon resource.

Pacific salmon are highly migratory species and, over the course of their life-cycle, salmon originating in the rivers of one country are often subject to the fisheries of another.

To support conservation, a significant amount of bilateral cooperation is required. The treaty was first signed by Canada and the U.S. in 1985 to provide the framework through which the two countries work together to manage Pacific salmon.

CERTIFICATION

Carbon footprint added to eco-scheme

Sustainable certification program Friend of the Sea is to include significant carbon footprint reductions as part of its audit requirements.

The scheme's technical committee approved the introduction of a mandatory yearly reduction of at least 20 percent of the carbon footprint created by the audited production.

Organizations must now have their carbon footprint assessed by an accredited third-party within a year of being granted certification.

Friend of the Sea's yearly surveillance audit will verify if the organization is offsetting or reducing its product's carbon

footprint by the minimum 20 percent every year.

"Friend of the Sea had already implemented a similar requirement as recommendation. In fact several certified companies, such as Omega Proteins Inc., Clean Seas and Frinsa, had already put in place a constant energy consumption reduction program, in some cases as part of their ISO 14001 certification," explained Paolo Bray, Friend of the Sea director.

20%

Friend of the Sea's carbon footprint reduction target

"We have now gone a step further and made this footprint reduction mandatory for Friend of the Sea certification".

"It will motivate others to lower their environmental impact," added Bray.

The Friend of the Sea Technical Committee is an open, independent body, representing stakeholders from all continents: governmental organizations, non-government groups, research institutes, the commercial industry and retailers.

It is the only committee which can propose and vote changes to Friend of the Sea criteria, in line with the United Nations' FAO guidelines.

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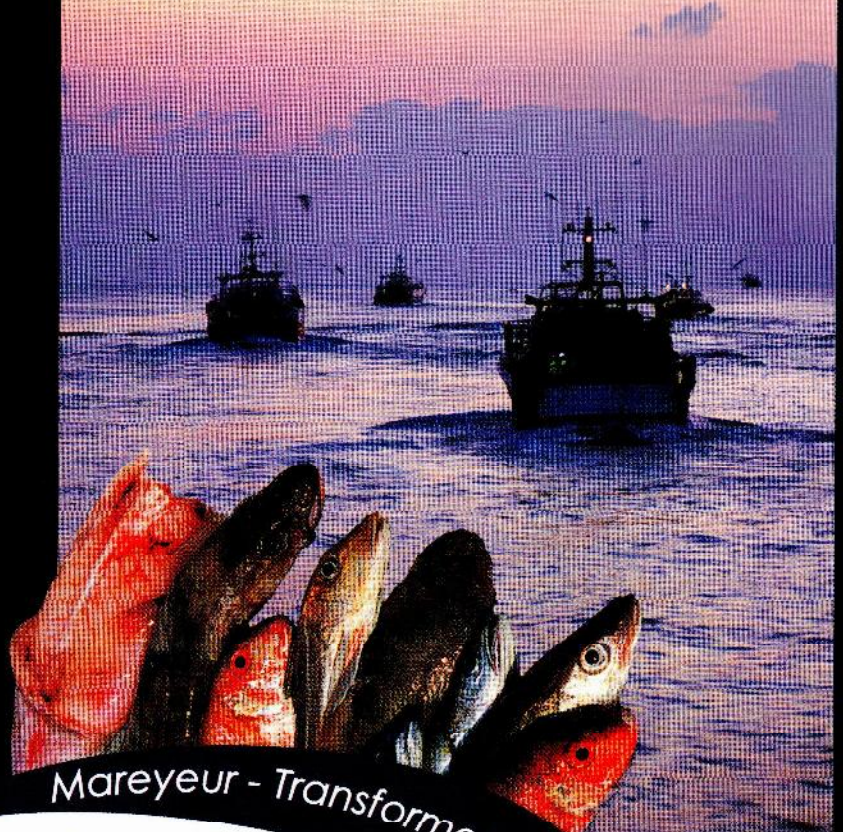
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Or, leur valeur marchande est bien plus élevée que leurs cousins d'eau douce herbivores. L'approche est donc très différente si l'on veut valoriser farines et huiles de poisson en espèces fines ou si on cherche à satisfaire les besoins alimentaires face à la croissance démographique mondiale.

Dominés par Skretting (Nutreco), Ewos et Biomar pour le poisson ou par des groupes thaïlandais pour la crevette, les fabricants mondiaux répondent partiellement aux attentes en optimisant la formulation et la digestibilité de leurs granulés. L'amélioration des indices de consommation (ou de conversion) (2) se vérifie avec bon nombre

d'espèces, en particulier les salmonidés. Cela est vrai moins pour les poissons marins comme le bar, la dorade, le turbot ou le cabillaud. L'un des progrès les plus importants de l'alimentation aquacole est la substitution des protéines et des lipides marins par des sources végétales. Pour la carpe, les poissons-chats, le tilapia et la truite-arc-en-ciel, il est possible de substituer d'autres protéines à 100 %. Même très carnivore, le saumon peut être nourri avec 25 % de farine de poisson et 10 % d'huile de poisson, sans compromettre les performances.

Malgré ces avancées, l'aquaculture disposera-t-elle d'assez de protéines et de lipides d'origine marine ? L'*International fish meal & fish oil organization* (Iffo) qui représente les 2/3 de l'offre mondiale, estime que les disponibilités en farine de poisson devraient suffire.

Ce n'est pas le cas, en revanche, pour l'huile de poisson dont la substitution par des huiles végétales a des limites. Car les poissons marins ne peuvent se passer totalement d'oméga 3, en particulier ceux à longue chaîne (EPA et DHA). Pour Jérôme Lazard, « la pénurie d'huile de poisson est imminente ». L'intensification de l'aquaculture chinoise de poissons pèse déjà sur les besoins. « Cela aboutit à une surconsommation aberrante de protéines marines par des espèces herbivores comme la carpe avec des aliments à 30 % de farine de poisson et 10 % d'huile de poisson ! »

Le sort des animaux domestiques va parfois contre-nature. Alors qu'on finit au grain des poulets nourris aux farines de poisson, un salmonidé alimenté en protéines végétales goûtera seulement aux huiles de poisson durant ses derniers mois d'existence... Les consommateurs occidentaux, c'est vrai, voient les produits aquacoles comme une source privilégiée d'oméga 3. D'où l'importance de la formulation des granulés aquacoles, à la fois pour garantir la santé du poisson et la qualité nutritionnelle de sa chair. Les acheteurs de poisson frais, verraient en effet d'un mauvais œil se dégrader le bénéfice santé d'une protéine traditionnellement plus chère que la viande.

Bruno VAUDOUR

(1) Centre de coopération internationale en recherche agronomique pour le développement
(2) Quantité d'aliment consommé pour 1 kg de poisson obtenu.



Le cabillaud (ici avant l'abattage) est très gourmand en protéines marines.

VOUS AVEZ DIT DURABLE ?

L'un des défis majeurs pour l'aquaculture est celui de l'alimentation artificielle. L'efficacité des granulés pour poisson conditionne beaucoup le niveau futur de la production aquacole. Comparé aux bovins, au porc ou à la volaille, le poisson transforme nettement mieux l'aliment, bien que sa croissance soit plus lente (voir le schéma page 58). Du coup, il captera une part croissante des protéines marines disponibles mais limitées. Les prévisions FAO d'utilisation des farines et huiles de poisson par l'aquaculture dépassaient déjà en 2004 celles de 2010. La situation est d'autant plus précaire que la demande alimentaire mondiale de produits aquatiques devrait atteindre 130 millions de tonnes en 2020. Niveau que la

pêche et l'élevage réunis ne pourraient satisfaire que si la croissance aquacole est suffisante. Pour Jérôme Lazard, chercheur au Cirad (1), « l'expansion annuelle à deux chiffres de l'aquaculture est pourtant terminée. Il y a donc un risque de pénurie... durable de poisson. »

Parallèlement, l'écolabélisation des produits aquatiques revient comme un leitmotiv. À ce titre, les fabricants d'aliments - comme les autres industriels du poisson - sont sollicités par leurs clients. « L'aquaculture responsable et durable a besoin de mettre en avant des pro-

téines marines certifiées pour ses aliments. Aujourd'hui, nous sommes certifiés *Friens of the Sea* » signale Dominique Corlay, directeur du Gouessant Aquaculture et président du Syndicat professionnel des producteurs d'aliments aquacoles (SPPA). Austral (Norvège) Omega Proteins (USA) ainsi que les sociétés Sovapec et Maromega (groupe marocain Kabbage Group) ont également obtenu la certification *Friend of the sea* pour leur farines et huiles de poisson. Par ailleurs, les cahiers des charges européens de l'aquaculture biologique reconnaissent implicitement la durabilité des pêcheries de poissons fourrage sous quotas, pour l'instant.

B.V.

