



FRIEND OF THE SEA

Sustainable Seafood

Friend of the Sea benchmarks scoring and recognitions

Independent Benchmarks - December 2012 Update

In the past years a number of benchmarks have been carried out to assess the validity and reliability of the requirements and activities of certification programs for sustainable or responsible fisheries and aquaculture.

This report has recorded only those benchmarks which can be considered 'independent'. A Benchmark can be deemed independent only if the organization carrying out or commissioning the assessment has no relation with the assessed schemes. For this reason the report published by WWF "Smart Fishing Initiative - Comparison of Wild Capture Fisheries Certification Schemes" and commissioned to a 12 years MSC consultant - Mr James Sullivan, could not be included in the study, in order to provide unbiased information. WWF is indeed founder and full supporter of MSC and creator of WWF Seafood Group, which presents itself as an alternative to Friend of the Sea.

Table 1 summarizes the outcome of the independent benchmarks carries out by some major Institutes, NGOs and professionals in Germany, USA, Canada. All scored Friend of the Sea as most reliable international certification program for aquaculture and fisheries. All scored Friend of the Sea better than MSC, ASC/WWF, IFFO, Freedom Food and much better than BAP, GAA, Global GAP, Naturland, Whole Foods and Marks & Spencer programs.

Fisheries Benchmark	FOS	MSC	ASC / WWF	IFFO	BAP	Freedom Food	Whole Foods	Naturland (Bio)	GAA	Global Gap	Marks & Spencer
Froese, Proelss	81% of FOS approved fisheries for which benchmark had data for were deemed Not Overexploited.	Only 61% of MSC certified fisheries for which benchmark had data for were deemed Not Overexploited.									
Food & Water Watch Europe - Fisheries	1st (First)	3rd (Last)		2nd							
Food & Water Watch Europe - Aquaculture	1st (First)		2nd		3rd (Last)	2nd					
Sea Ecology / Pew Environmental Group	1st		At the time only in draft				2nd	3rd	4th	5th	Last

Table 1.

To add up to the positive scores obtained by the mentioned benchmarks, Friend of the Sea has obtained a number of worldwide recognitions and awards. More details and evidence of the benchmarks and recognitions are provided in the next few pages. For more information, please feel free to contact info@friendofthesea.org.



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Froese R, Proelss A. Evaluation and legal assessment of certified seafood. Mar. Policy (2012) (<http://dx.doi.org/10.1016/j.marpol.2012.03.017>) Rainer Froese, GEOMAR, Kiel, Germany, Alexander Proelss, University of Trier, Trier, Germany

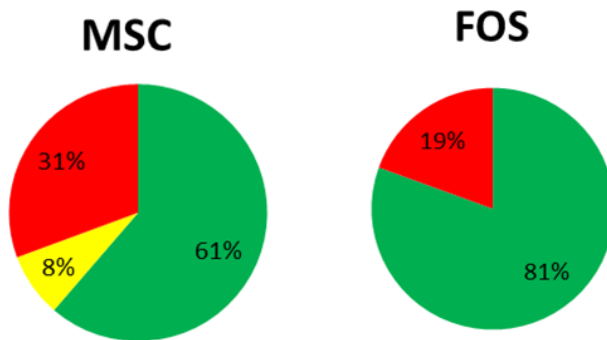


Figure 2.

German Research Foundation DFG funded study concludes consumers should buy FOS certified products. FOS more reliable with 81% Green Stocks

Geomar scientist Dr. Rainer Froese and Prof. Alexander Proelss of the German University of Trier, assessed the activity of certifying organizations like FOS and MSC and the reliability of their certification process in the study “Evaluation and Legal Assessment of Certified Seafood”. This study was supported in part by the Future Ocean Excellence Cluster 80, funded by the German Research Foundation on behalf of the German Federal State and State Governments.

The study concludes that it is reasonable to buy certified seafood, because the percentage of moderately exploited, healthy stocks is 3-4 times higher in certified than in non-certified seafood.

“By buying seafood from these healthy stocks, consumers support sustainable fisheries, meaning that they can eat their fish and have it, too. So, shall consumers shopping for seafood still buy certified products? Yes!”

The study also produces some suggestions for the good use of certification programs: “In the certification criteria, give more weight to the status of the stock and close any loopholes. Especially MSC would be well advised to drastically simplify their assessment procedure and prescribe much shorter, highly standardized assessment reports where status of the stocks and fishing pressure can be easily found and verified.”

According to the study assessment logics, some of the FOS fisheries approvals were not based on the most official and updated stock status data. The study also criticized the Marine Stewardship Council: “In the case of MSC, the assessors are for-profit companies which are chosen and paid by the fisheries to be assessed. After reading through over 100 assessments and related documents, we could not help the feeling that these assessors were biased towards bending the rules in favor of their clients. [...]. Also, it seemed to us that MSC itself, who may participate in the assessment process as one of the stakeholders, did not make efficient use of this opportunity to point out cases where their criteria were not applied correctly by the assessors.”



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FOOD AND WATER WATCH EUROPE - De-Coding Seafood Eco-Labels: How the European Commission Can Help Consumers Access Sustainable Seafood - April 2011 (www.fwwatch.org)

Food & Water Europe



Eco-Label Comparison and Breakdown

Table 1: Concerns Associated with Standards for Certifying Wild Fish, by Label

	MARINE STEWARDSHIP COUNCIL	FRIEND OF THE SEA (WILD CRITERIA)	INTERNATIONAL FISH MEAL AND FISH OIL ORGANIZATION
Prohibitive costs	⚠		
Ambiguous or non-transparent criteria	⚠	⚠	
Insufficient public input	⚠	⚠	⚠
Negative impact on marine animals	⚠	⚠	⚠
No carbon footprint standards	⚠		⚠
Certifies forage fisheries or their products	⚠	⚠	⚠
Free-rider problem	⚠		
Incongruent with FAO criteria	⚠	⚠	⚠

Table 2: Concerns Associated with Standards for Certifying Farmed Fish, by Label

	BEST AQUACULTURE PRACTICES	FRIEND OF THE SEA (FARMED CRITERIA)	AQUACULTURE STEWARDSHIP COUNCIL/WWF*	FREEDOM FOOD	TERRE ET SAVEUR
Prohibitive costs	⚠		TBD		N/A
Does not prohibit... GE	⚠				
antibiotics	⚠	⚠	⚠	⚠	Unknown
hormones	⚠		⚠		Unknown
Ambiguous or non-transparent criteria		⚠		⚠	⚠
Insufficient public input	⚠	⚠	⚠		⚠
Certify farms with negative impact on mangrove ecosystems	⚠		TBD	N/A	Unknown
No carbon footprint standards	⚠		⚠	⚠	Unknown
Insufficient FCR standards		⚠	TBD	⚠	Unknown
Free-rider problem			⚠		Unknown
Insufficient worker safety	⚠		TBD	⚠	Unknown

*Standards have only been completed for four (tilapia, pangasius, bivalve and abalone) out of the 12 categories being discussed in the Aquaculture Dialogues.¹⁴ Because each species or category of species is being discussed separately, not all violations will necessarily apply to all standards. Concerns listed here are associated with one or more of the completed sets of standards. No standards produced by the Aquaculture Dialogues yet have made reference to carbon footprint.

Food & Water Europe (FWE) NGO, in its "Decoding Seafood Eco-labels" paper, assessed fishery certification programs such as Friend of the Sea and MSC. FWE identifies only 4 concerns regarding Friend of the Sea standards compared to 8 concerns regarding MSC. FWE is particularly concerned about MSC's prohibitive costs, lack of carbon food print standards, and free-rider problem.

The 'Free rider' problem is explained by Food & Water as follows. "The fishery is given conditions for improvement, but unfortunately, this means that a fishery with significant flaws may still carry the MSC logo, indicating sustainability, before it has achieved any improvements. This creates what is known as the "free-rider" problem, in which fisheries that are flawed, yet certified, get to ride on the reputation of the more sustainable certified fisheries. Worse still, it risks seriously misleading consumers who may refer to the full standards and assume that certified products comply completely with all of them".

When comparing Friend of the Sea to other aquaculture certification programs, the superiority is even more striking as FOS beats all others. Food & Water Europe has identified 4 concerns for Friend of the Sea and 8 for Best Aquaculture Practices (BAP), 5 for ASC (with other 4 pending as they still have To Be Defined) and 5 for Freedom Food. The study highlights the differences between FOS and the other mentioned programs: prohibitive costs (BAP); no prohibition of GMOs (BAP); no prohibition of use of hormones (BAP and ASC); certification of farms with negative impact on mangrove ecosystems (BAP); no carbon footprint standards (BAP and ASC); free rider problem (ASC); insufficient workers safety (BAP).



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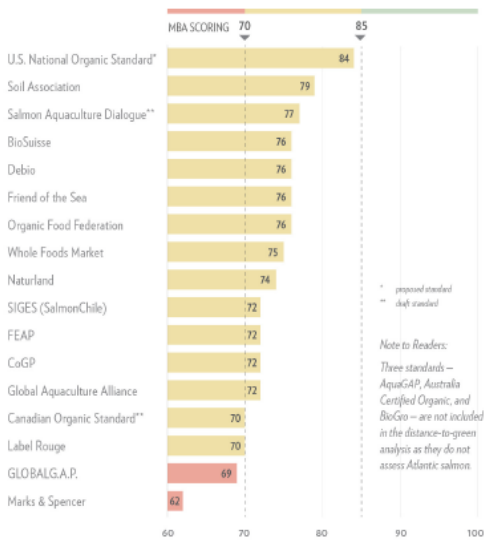
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SEA ECOLOGY / PEW ENVIRONMENTAL GROUP - How Green Is Your Eco-label? Comparing the Environmental Benefits of Marine Aquaculture Standards (December 2011 - University of Victoria, Seafood Ecology Research Group - Supported by the Pew Environment Group)

http://web.uvic.ca/~serg/papers/GAPI_Benchmarking_Report_2011.pdf

Figure IV: Distance to Green: MBA rating results (Absolute Performance Scores for Atlantic salmon)

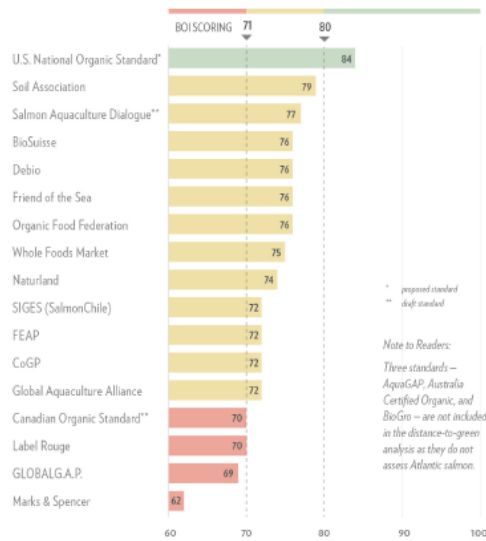
No standard achieves a green rating. Only one standard – the proposed U.S. National Organic Standard – comes close to a green ranking. Most standards fall in the yellow category and two in the red category.



10 How Green Is Your Eco-label? Executive Summary

Figure V: Distance to Green: BOI rating results (Absolute Performance Scores for Atlantic salmon)

The proposed U.S. National Organic Standard is also the only standard to achieve BOI's green rating. Similar to the MBA results, 12 of 17 standards fall into BOI's yellow category and four into its red category.



11 How Green Is Your Eco-label? Executive Summary

Seafood Ecology Research Group study confirms Friend of the Sea is the best international multispecies standard for sustainable aquaculture.

Friend of the Sea Absolute Performance Score, according to the study, was **better than all major sustainable aquaculture schemes operating at international level**: Global GAP, Global Aquaculture Alliance, AquaGAP and also better than some bio standards (Bio Suisse, Australia Certified Organic) and retailer standards (Whole Foods Market and Marks & Spencer). The study also concluded that Friend of the Sea's standards are driving more change than Naturland, BioSuisse, GAA, Label Rouge and Marks & Spencer. When all standards were compared according to their requirements for salmon aquaculture, Friend of the Sea scored second only to the bio Soil Association standard.

Very similar results were obtained when compared to Monterey Bay Aquarium criteria.



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Monterey Bay Aquarium / Seafood Watch benchmark of MSC and Friend of the Sea (preliminary results) fisheries.

The preliminary assessment carried out by the Monterey Bay Aquarium concludes that Friend of the Sea and MSC have the same level or reliability/credibility. When assessing the validity of FOS and MSC's assessment of fisheries with available stock status data, MBA concludes that FOS assessment is more valid (2,54 vs 2,35).

Friend of the Sea

score factor 1 stock status	2,64	2,16
score factor 2 impacts on other species	2,16	1,14
score factor 3: management	3,00	3,00
score factor 4: habitat and ecosystem	2,45	2,45
Resulting SW final score	2,54	1,92
Resulting	good alternative	avoid

OVERALL RANKING	MSC-FAM		MSC-RBF	
Final Score	2,54	Yellow (good alternative)	1,92	Red (Avoid)
Red Criteria	1		3	
Critical Criteria?	0		0	

Red	Mean = <2.199 3.1 or 3.2 is scored Poor (1) One critical criterion
Yellow	Mean = 2.2 to 3.199
Green	Mean > 3.2 No red criteria

MSC

score factor 1 stock status	3,05	2,16
score factor 2 impacts on other spi	2,29	1,62
score factor 3: management	3,00	3,00
score factor 4: habitat and ecosyst	1,94	1,94
Resulting SW final score	2,35	1,98
Resulting	good alternative	avoid

OVERALL RANKING	MSC-FAM		MSC-RBF	
Final Score	2,35	Yellow (good alternative)	1,98	Red (Avoid)
Red Criteria	1		3	
Critical Criteria?	0		0	

Red	Mean = <2.199 3.1 or 3.2 is scored Poor (1) One critical criterion
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RECOGNITION - EU mentions Friend of the Sea as one of the four labels consumers should look for when choosing sustainable fish.



Other mentioned labels include the Dolphin-Safe label, which is close partner of Friend of the Sea, via the Earth Island Institute. A requirement of certification of tuna as Friend of the Sea is that the fishery be also approved Dolphin-Safe by the Earth Island Institute.

The booklet produced by the EU 'How do you choose your fish' is translated in 30 and more languages, widely distributed to consumers and media and available on the EU Fisheries Commission's website.

- Management system: the fisheries must comply with the management measures laid down by law for the zone concerned.
- Impact on the ecosystem: the fishery must not have an adverse effect on the ecosystem.

Which are the main labels that certify sustainable fisheries?

- The Marine Stewardship Council (MSC), created in 1997, certifies a fishery or a fish stock. It operates worldwide, with the majority in developed countries, and applies multiple international standards including the UN FAO Code of Conduct for Responsible Fishing.
- The 'Friend of the Sea' (FOS), created in 2006. It certifies both farmed fish and fish caught at sea, in both developed and developing countries.
- The KRAV 'fisheries' label, created in 2004, is limited to Sweden and Norway.
- The 'Dolphin Safe', label focuses solely on by-catches of dolphins, but does not guarantee other conditions for sustainable fisheries.

Major retailing chains and other players have also organised their own labels, but consumers should get information about the true extent of these commitments.

Does size really matter?

It is important to take care to buy only fish that have reached adult size. Fish that are caught too young have not had a chance to reproduce and help renew stocks. Talk to your fishmonger and find

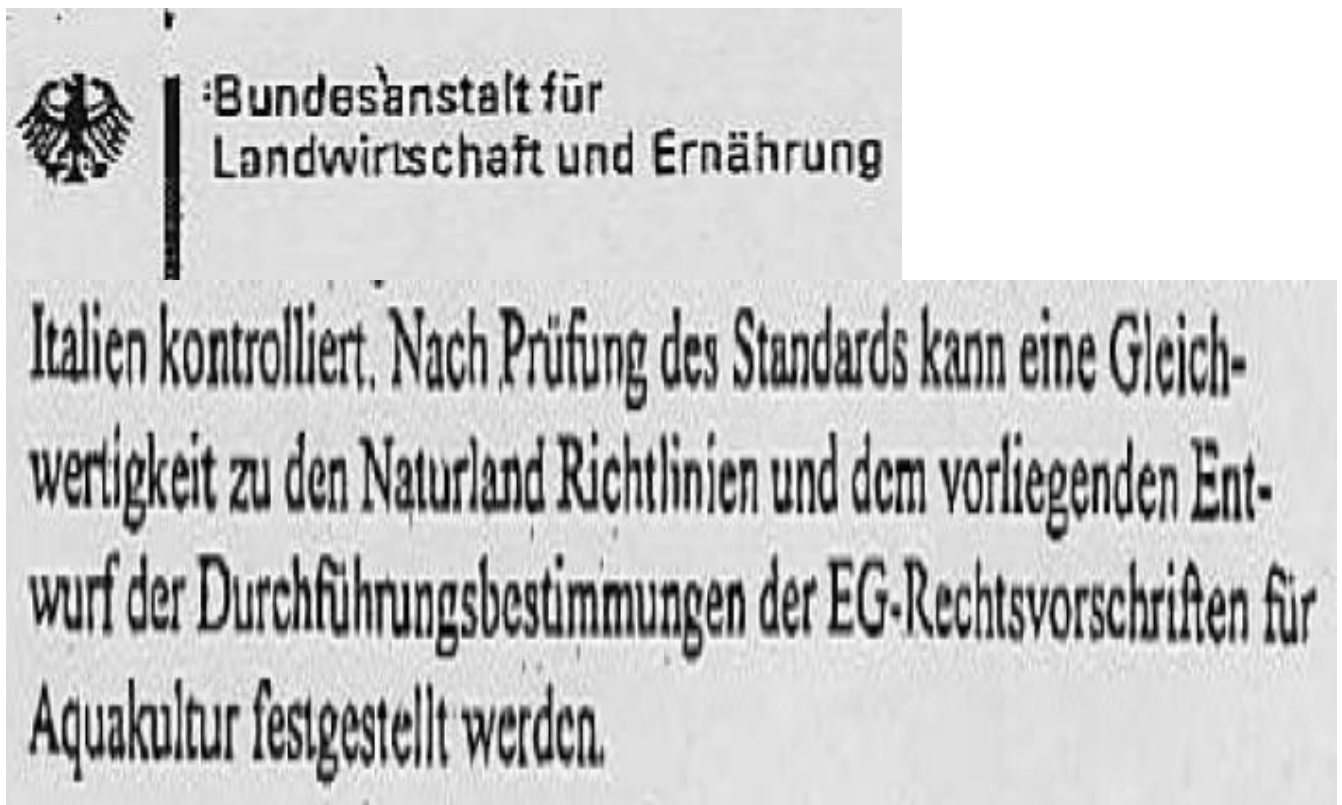


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RECOGNITION - Bundesanstalt für Landwirtschaft und Ernährung (Federal Agency for Agriculture and Food)

The German Federal Agency for Agriculture and Food, after examination of the Friend of the Sea standards has confirmed a direct equivalence with the rules of Naturland and the draft of EU organic Aquaculture regulation.





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RECOGNITION - Bundesverband Naturkost Naturwaren - Einzelhandel e.V. (Organization for Organic and Natural Products)

The German Organization for Organic and Natural Products has included Friend of the Sea in a list of reliable and valid natural certifications



Als geeignete Kontrolleinrichtungen/Zertifizierer im Sinne dieser Richtlinien zur Gewährleistung der Rückverfolgbarkeit gelten (Stand: August 2012):

- Naturland
- KRAV Ekonomisk Förening
- MSC (Marine Stewardship Council)
- ASMI (Alaska Seafood Marketing Institute)
- IRF (Iceland Responsible Fisheries)
- FOS (Friend of the Sea)

Sofern ein Hersteller bzw. Anbieter von Wildfischprodukten mit keinem der genannten Zertifizierer zusammenarbeiten will, obliegt es ihm, eine nachweislich fachkundige, unabhängige Institution mit der Überprüfung der Einhaltung der festgelegten Nachhaltigkeitskriterien zu beauftragen, deren Bericht und Befund seinen Abnehmern vorzulegen und diesen in Verbindung mit dem Produkt kenntlich zu machen.



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RECOGNITION - INFOSAMAK, the FAO branch in support of seafood producers in the Arab Countries, has selected Friend of the Sea to assess several fishermen's cooperatives in five Countries.

A first audit has been carried out and some species have been certified at Merja Zerga fishermen's cooperative in Morocco. The cooperative has consequently received a medal of merit from the FAO.

Friend of the Sea representatives are also regularly invited as speakers at major FAO international conferences, in consideration of the validity and credibility of the Friend of the Sea program.

