



The MSC/ WWF-SASSI Sustainable Seafood Symposium

Annual Overview

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1 March 2017

The River Club, Observatory, Cape Town

The 5th annual Marine Stewardship Council (MSC)/ WWF Southern African Sustainable Seafood Initiative (SASSI) Sustainable Seafood Symposium was held on Wednesday 1st March at The River Club in Observatory. Seventy-five people attended, including seafood market leaders, government representatives, media contacts, fishing industry representatives, academics and marine scientists.

The event was opened by the senior manager of the WWF-SA Marine Programme, John Duncan, who challenged the audience to consider how they as individuals could also assist the seafood industry in overcoming some of the challenges faced.

First Session: chaired by Pavs Pillay, WWF-SASSI Programme Manager

The importance of seafood and the plan to address its sustainable future

Mkhululi Silandela, Programme Manager: Smallholder Farmers – WWF-SA Sustainable Agriculture Programme, spoke on seafood as a food security issue and the vital need for food security across all sectors. According to the Global Hunger Index (GHI) which categorises countries according to hunger severity, South Africa falls under the moderate category with up to 20% of South African households being food insecure. Seafood plays a vital role in global food security making up 17% of all the protein consumed in the world and it provides more than 3.1 billion people with at least 20% of their animal protein and fatty acids requirements.

Michael Marriott, MSC Southern Africa Manager presented an insight into the MSC's strategic priorities to 2020. The 2017-2020 strategic plan will take effect from April this year and will focus on fisheries where changes can make a significant contribution to global environmental performance. Whilst driving markets and working with certified fisheries will remain a core area of work for the MSC, the new plan will help to guide proactive engagements based on factors such as the biological importance of the Large Marine Ecosystems in which fishing activities are based, accessibility for Developing World fisheries, relative representation of species groups within the MSC programme and contribution to market demand. The South Africa office will continue to work with local supply chain companies and retailers to increase demand and presence of ecolabelled products available to consumers.

Stephanie Rainier, WWF-SASSI Retail Engagement Officer spoke on the future of WWF-SASSI's engagement with retailers, restaurants and their suppliers. There is a long road to sustainability in the seafood supply chain but WWF-SA have set some significant goals for 2025 focusing on procurement that creates change in fisheries. Addressing transparency and traceability will remain a key focus through collaboration and sharing the journey with consumers who want to know where their seafood comes from. The formation of a "Sustainable Seafood Alliance" independent of the WWF-SASSI programme was also highlighted as an end goal.

Open mic session

The symposium format took a slightly different approach this year as members of the audience were invited to briefly share their experiences, challenges and successes. Key discussion points included:

- **SADSTIA:** Highlighted the value and successes of the SA hake trawl fishery and challenges faced in the WWF-SASSI species assessment of bycatch species as the assessment criteria does not work for all species and problems persist with transparency in scoring.
- **Two Oceans Aquarium:** Noted challenges regarding the training of restaurant staff and offered suggestions on how to overcome these.
- **Independent:** Raised challenges around bycatch issues in the long line tuna fishery and feels that the use of the ecosystems based approach is not inclusive of all involved in the fishery i.e. the fishermen.
- **CapMarine:** Spoke of the success of the FCP in the hake longline fishery which resulted in a green-listing of the species. The FCP was based on a pre-assessment using the MSC standard as a benchmark which serves as a baseline for sustainability.
- **Independent:** Suggested a guide book be developed on how to address Illegal, unregulated, unreported (IUU) issues within the supply chain as well as the use of traceability software which is now available.
- **GreenFish:** Suggested more emphasis be placed in changing the trends in the demand for seafood, citing the popularity of farmed salmon as an example, which would in turn create a change in the supply change to a more sustainable basis.

Second session: chaired by Angela McQueen, MSC Southern Africa Communications Manager
Linking sustainable fisheries to the market

The key note address, *“Investing in Sustainability”*, was delivered by **Brett Wallington**, Senior Manager of Sustainability at Standard Bank Group, based in Johannesburg. Brett offered a refreshing view on how Standard Bank is taking on the sustainability challenge. He said that general sustainability strategies very often are seen as a means to greenwash and have no real grassroots impact or outcome at the end of the day. Brett and his team have set out to change that. Their plan is to start from the bottom and to get staff on board to analyse which projects or sectors the bank is financing and the outcomes thereof using a new “shared value” concept, while at the same time aligning activities with the UN sustainable development goals. A framework of values based on social, environmental and economic (SEE) impacts has helped Standard Bank take on a more holistic view, measuring their values beyond financial outcomes.

Dr Kevern Cochrane, Research Fellow at Rhodes University, gave a detailed report on the state of South African fisheries in 2017 – *“Current trends in South African fisheries: what role can the supply chain play?”* He spoke on the current trends, successes and challenges faced in the South African context and the important role government and supply chain can play. Dr Cochrane emphasised the need for steps to be taken in order to improve the current status of certain key fisheries. For government this includes staying firmly within the goals and requirements of the South African constitution, increasing compliance, and managing for maintenance and recovery of stocks. For fishers and the fishing industry, there is the need to collaborate with DAFF. For retailers and consumers it included supporting small scale fisheries and local, sustainably harvested fish.

Dr Cochrane also noted the challenges facing South Africa’s line fisheries which support around 30 000 subsistence fishers of which 85% are harvesting linefish. The estimated gross annual income of small-scale fisherman is estimated to be under R16 000 and he highlighted the need for more value to be given to local species.

He also explored the benefits of MSC certification and ecolabelling to the supply chain and the possibility of having more South African fisheries certified to the MSC standard. He noted that MSC certification not only resulted in improved social and economic benefits for the South African hake trawl fishery, but has also driven important improvements in management, particularly but not only, in the area of an ecosystem approach to fisheries. He also acknowledged WWF-SASSI's role in providing a mechanism for informing consumers and thereby providing an incentive for ensuring responsible and sustainable fisheries and a disincentive for failure.

Discussion session

Following these presentations, **Michael Cohen**, a Market Outreach Associate for the International Sustainable Seafood Foundation (ISSF), facilitated an open audience discussion. Many points were raised during this facilitated session, among them:

- *The importance of the role of government regarding transformation in the sector needing to be clearly defined and directed.*
This includes the importance of setting criteria before the rights allocation process and more transparency regarding how the set process is to be followed. A charter is needed that will help guide the industry. Problems are also caused due to a lack of understanding of the value of fisheries even though economic studies have been conducted). There was a suggestion to hold a fisheries indaba and resurrect the conversation on some key issues that have been ignored or faded over recent years.
- *West Coast rock lobster and abalone have a strong criminal link.*
The focus needs to be on eradicating poaching and we need to separate the issues around poaching for subsistence (those who poach to feed their families) and poaching in the context of organised crime.
- *With a focus on the difficulties faced by small-scale fishers, a question was raised as to how the MSC intend to work with small scale fisheries and if it would be possible to certify a fishery which may include threatened species.* The MSC's first phase to certification is to map existing fisheries and identify the unit of certification and how a fishery could potentially benefit. A MSC pre-assessment would be conducted to identify gaps and the actions which need to be implemented.
- *Suggestion for WWF-SASSI to consider the human component when a species WWF-SASSI assessment outcome changes.*
- *There fears that progress is not being made in South African fisheries due to trust issues between government, industry and NGO's.*
- *General agreement/ tone suggesting that all stakeholders need to work together and perhaps look at also introducing a more community based approach to lead to responsibly managed fisheries.*
- *Suggestion that people outside this industry need to come to the table.* The problems equate to a socio-economic issue with resources dwindling even in the event of solving the poaching problem. Therefore it's up to us to come up with innovative approaches to helping communities – it's becoming a massive problem that goes further than fisheries.

Closing

Michael Marriott thanked the attendees and emphasised the general tone of the event which supported the notion of closer working relationships and the importance to focus on what we can do as an industry collaboratively and what each individual can bring to the table.

2 March 2016

Welbeloond Boutique Wine Farm

The annual MSC/ WWF-SASSI Sustainable Seafood Symposium was held on Wednesday 2 March at Welbeloond Boutique Wine Farm in Durbanville – this was the fourth time the event was held at this venue. Various stakeholders from all aspects of the seafood supply chain were invited and over 70 people were in attendance, including seafood market leaders, government representatives, media contacts, fishing industry representatives, academics and marine scientists.

The event was opened by the Head of the MSC Developing World Programme, Dr Oluyemisi Oloruntuyi, who provided a brief overview of how seafood market incentives have ultimately led to positive changes in certain fisheries. The first session of the event was then chaired by Michael Marriott, the MSC South Africa Manager.

Jess Schulschenk, a Director at the Sustainability Institute, then gave the key note address, which focussed on the “Future Fit idea” – a concept that highlights the need for environmental sustainability and social responsibility in businesses as a necessary consideration to create the stability required for business to flourish. She also introduced the idea of “co-opetition”, which is defined as *“collaboration between business competitors, in the hope of achieving mutually beneficial results”*.

The WWF-SA Seafood Market Transformation team collaboratively presented highlights from the programme over the previous year, including the 2015 #SASSIstories consumer campaign – key outcomes and lessons learned (presented by Pavs Pillay, the WWF-SASSI Programme Manager), the launch of “Waves of Change” report - the second WWF-SASSI Retailer/ Supplier Participation Scheme Report (presented by Stephanie Rainier, the WWF-SASSI Retail Engagement Officer) and the impact of WWF-SASSI at the fisheries level – specifically in the hake longline fishery as well as the offshore and inshore demersal hake trawl fisheries (presented by Jessica Greenstone, the WWF-SA Marine Science & Policy Lead). This was concluded by Chris Kastern, the WWF-SA Seafood Market Transformation Manager, providing an overview of the WWF-SA Marine Programme vision for 2025.

For the first time at the symposium, a number of WWF-SASSI Retailer/ Supplier Participation Scheme participating companies took part in a panel discussion that was facilitated by the WWF-SA Market Transformation Programme Manager, Tatjana von Bormann. The panellists were Adiel Fortune (International Business Development Manager at I&J), Andre Nel (Head of Sustainability at Pick n Pay), Justin Smith (Head of Sustainability: The Good Business Journey at Woolworths), Roelof Brink (Head of Strategic Sourcing at Ocean Basket) and Dean Stacey (Business Development Director at Breco Seafoods). The focus of the panel was to discuss the benefits and challenges experienced in transforming the individual company’s seafood operations. Major benefits that were noted included the increased collaboration between companies throughout the seafood supply chain as well as the platforms that internal seafood sustainability initiatives created for addressing issues in other major commodities. The challenges varied across the participants from sourcing sustainable alternatives to correct labelling to the fact that many imported species are not MSC certified or are “Not-assessed” by WWF-SASSI., However, a key

challenged that was mentioned by all the panellists was the apparent increased cost of supplying sustainable seafood and the impact that this can have on their businesses. It was also noted by the participants that pressure needs to be placed on key competitors in their sectors (national retailer chains, major restaurant franchises and large seafood importers/processors/ distributors) to start actively and openly work towards improving sustainability in their seafood operations, this was seen as critical in achieving comprehensive market transformation and thereby creating a level playing field in the market.

After a short break, the second session of the event was opened by the chair for this part of the symposium, Pavs Pillay. Dr Oluyemisi Oloruntuyi then gave a comprehensive overview of the work that the MSC is doing in the developing world context, including the increasing number of fisheries that are being certified to the MSC Fishery Standard or that are involved in Fishery Improvement Projects (FIPs). She also highlighted the plans for the future, which will focus on increasing capacity and outreach as well as revising the MSC standard and process to make it more accessible to developing world fisheries.

The MSC Southern Africa Communications and Office Manager, Angela McQueen, introduced the MSC traceability campaign, which is due to launch on 16 March. She noted the importance of the initiative, highlighting that, at a global level, up to 30% of all seafood is misrepresented or mislabelled. The aim of this campaign is to recognise the importance of being able to trace a seafood product back to source and inspire people to purchase seafood with the MSC ecolabel on the consumer facing packaging.

Following these presentations, Michael Cohen, a Market Outreach Associate for the International Sustainable Seafood Foundation (ISSF), hosted an open audience discussion. Many points were raised during this facilitated session, some of which have been highlighted below:

- The idea of incorporating a mechanism that supports with the MSC's engagement with fisheries with little data - such as many developing world fisheries - to take a risk based approach to becoming certified was debated.
- The commercial implications of the increased costs associated with access to MSC certified products was discussed, especially if it pertained to key commodities for the South African market such as hake. Conversely, the opportunities for MSC or ASC certification of other key commodities with environmental sustainability concerns, such as salmon and shrimp, were noted.
- Ensuring an inclusive WWF-SASSI assessment process that does not advantage or disadvantage either small-scale, commercial, local or foreign fisheries was interrogated by attendees. WWF-SA noted the mechanisms and processes in place to ensure consistency across all assessments as well as the efforts have been, and continue to be, underway to engage government, scientists and industry in the assessment process.
- Increasing collaboration between government and industry, especially the retail sector, to address key challenges in ensuring adequate traceability in seafood supply chains was suggested. There was also discussion on cross-sectoral efforts required to embed sustainable seafood procurement practices comprehensively in the South African market, especially in the major seafood vendors that are currently not actively addressing seafood sustainability. Furthermore, the

relevance of implementing transparent and consistent seafood product labelling for both local and imported seafood products was highlighted.

- Concerns that need to be addressed, such as the gaps between small-scales fishers and access to the formal market, were raised. Linked to this was a discussion on the role of the market in creating alternative livelihood opportunities for coastal communities that rely on harvesting marine resources that are currently over-exploited or collapsed.
- There were also calls for alignment between the South African Marine Living Resources Act and the transitory actions required to progress towards sustainable utilisation of marine resources in South Africa. It was suggested that the MSC and WWF South Africa prioritise the incorporation of social aspects into the MSC standard as well as the WWF-SASSI assessment process.

The closing was provided by Theresa Frantz, the head of the Environmental Programmes at WWF-SA. She thanked the presenters and panellists for their robust questions and discussions at the symposium. Theresa then provided an overview of the event highlighting the importance of traceability, and noting many of the struggles that are faced are across the seafood sector and therefore collaboration is key, especially since each stakeholder plays a different role in the solution.

INTRODUCTION

Sustainability is drawing increasing attention from businesses and consumers alike. With the success of environmental awareness programmes around the world, certification and eco-labelling are increasingly being recognised as a useful tool to bring about more effective management in fisheries. Evidence is also growing that real environmental and economic benefits can result from these market based initiatives. Despite this, engagement from small-scale and developing world fisheries, relatively slow.

The 3rd Annual MSC/WWF-SASSI symposium focused on consumer trends and the business case for sustainability, bringing 64 delegates from across the seafood supply chain, including representatives from fisheries, seafood industry and retail and NGO and government stakeholders. As well as looking at certification, delegates discussed the role of Fisheries Improvement Projects (FIP) in helping fisheries to address specific challenges.

PRESENTATIONS

Session 1

1. *Sustainability in Business* – Michael Marriott (MSC)
2. *Ten Years of being SASSI* – Janine Basson (WWF-SASSI)
3. *Sea Change Report 2014* – Stephanie Rainier (WWF-SASSI)
4. *Doing Good is Good Business* – Cindy Jenkins (Pick n Pay)
5. *Analysis of Economic Benefits of MSC Certification for the SA Hake Fishery* – Philippe Lallemand (OLRAC)
6. *Sustainable Seafood: Saving Seabirds* – Angela McQueen (MSC)

Session 2

7. *SKA Involvement in the WWF Small-Scale FIP Benchmarking* – Marthane Swart (Sandra Kruger & Associates)
8. *MSC Overview of FIPS in the Developing World* – Martin Purves (MSC)
9. *Woolworths & FIPs* – Hezron Joseph (Woolworths)
10. *Hake Long Line Fishery Conservation Project* – Clyde Bodenham (SAHLLA) & Victor Ngcongco (CAPFISH)

SUMMARY OF DISCUSSIONS

- 1) Retailers were highlighted as playing a potentially important role in moving local fisheries towards more sustainable practices. As in many countries, a number of retailers in South Africa have made sustainability commitments. Whilst these should encourage more local fisheries to engage in FIPs or to enter assessment against the MSC standard, retailers could do more by giving more focus to import substitution in their product development plans.

Suppliers increasingly recognise sustainability as an important consideration when dealing with retailers and it was noted that most are willing to engage with sustainability programmes. Retailers across the world are asking similar questions in relation to the sustainability and traceability of the seafood they buy and, although there are some ongoing challenges in communicating the requirements of certification programmes, especially in respect to language barriers, it was generally felt that there is a global momentum shift.

- 2) Participants expressed a concern at the lack of alignment between SASSI assessments for species caught as bycatch and the scoring and conditions that have been satisfied as part of MSC certification. There is some sense that SASSI assessments bias against trawl fishing, even though recent research suggests impacts may not be as severe as many believe.

In response it was pointed out that SASSI is taking an increasing interest in trawl fisheries. Also, whilst SASSI presents a 'snap-shot' of the current situation, MSC certification is a long term process, which, in terms of market recognition, only applies to species that have been assessed as target species (under the MSC's Principal 1, which measures performance of the fish stock). It was noted that bycatch can be assessed as target species under Principal 1. There is also the option to engage in Fisheries Improvement Projects (FIP) for select species – granting some level of market recognition whilst moving towards certification.

- 3) The certified SA hake trawl fishery has received much attention and international colleagues have been impressed with the developments and partnerships that have formed to address specific certification conditions. The economic benefits of certification, which have enabled penetration into new markets and securing existing markets, have now also been well documented. Participants queried the accessibility of MSC certification for other local fisheries, however, with specific challenges such as poaching, corruption and lack of organisation identified as major hurdles. Industry also questioned WWF's relationship with MSC, observing that they do not promote other wild-capture eco-labelling schemes.

WWF expressed the view that sustainability is one thing, regardless of fishery scale. In many small-scale and developing world fisheries there is a lack of data and management and these are the main challenges in moving towards MSC certification. Unless the bar is lowered, other schemes would face similar challenges. Whilst a number of certification and eco-labelling schemes do exist for wild-caught seafood, WWF commissioned research has shown MSC to be the only one that is consistent with UN FAO guidelines on fisheries eco-labelling. It is therefore seen as the 'gold' standard and where a fishery is MSC certified it complies with WWF's mission. WWF will however recognise non-certified fisheries if there are other means of verifying sustainability and this is one of the primary reasons for the development of FIPs.

There is general acknowledgement that not all fisheries could benefit immediately from certification, but the MSC standard also plays an important role in helping to develop FIP action plans and has proved to be a useful tool for FIP providers. The MSC standard also allows for certification of data poor fisheries through a Risk Based assessment.

- 4) Market recognition is an important incentive to improvements, both for FIPs and for fisheries looking at certification. Participants were unclear on the continued incentive to progress to full certification if there was equal recognition for FIPs. The definition of a FIP was also questioned – i.e. whether WWF's definition includes an ultimate goal of MSC certification.

For many fisheries it is not possible to chart a strategy that will definitely lead to certification. WWF's focus is to work with the fishery in a step-wise approach that is based on the MSC Standard. As such, the outcome should ultimately be compliance with, but not necessarily certification against the MSC standard.

For FIPs it was noted that Internal Control Systems will be integral to long term improvements in most fisheries and these need to include establishment of committees that can work with DAFF and the legal authorities. It is important too that fisher communities are involved in discussions from an early stage.

The MSC is looking at how/whether to give recognition to small-scale fisheries in FIPs (would not apply to industrial fisheries that do not progress to certification). Also, whilst being in a FIP fulfils the requirements of most retail commitments in SA, it does not influence a fishery's SASSI colour rating and to remain in a FIP a fishery must demonstrate continued improvement against a defined action plan. Consequently, a FIP on its own will not merit ongoing market recognition.