

Minutes: Sustainable Seafood Coalition Feed Working Group

3rd September, 14:00-16:00.

17 Participants (11 FWG members, 5 NGO representatives, 1 Secretariat).

SUMMARY OF NEXT STEPS:

- Secretariat to amend Objectives and Activities document in line with member feedback and invite Feed Working Group to provide final feedback and/or sign-off over email (Discussion 2.2).
- FWG members to identify preferences for the next session, between inviting either a) non-seafood stakeholders or b) policymakers and experts in fields relating to aquaculture feed ingredients (Discussion 2.2.1).
- Secretariat to collate all identified potential activities from previous FWG meetings and share with members for consideration.
- At the next meeting, FWG members to discuss & prioritise that range of potential activities.

1. PRESENTATIONS FROM NGOS

1.1 The Secretariat reminded attendees of the three broad objectives for the FWG. They explained that the first objective is to gather information & perspectives from a broad range of stakeholders, the second is to develop internal guidance for SSC members, and the third is to collectively influence external stakeholders towards collective progress on responsibly-fed aquaculture.

1.2 The first presenter began by explaining their organisations' focus on marine ingredients. Their primary focus is on ensuring the responsible management of fisheries, regardless of end use. They do not take a position on how fisheries products are used after harvesting. They recommended that buyers adopt policies requiring marine ingredients to be certified or in a credible FIP, and recognised the ASC feed standard as a useful roadmap for strengthening requirements over time. They suggested that the MarinTrust is being underutilised for products such as pet food, surimi and nutraceuticals. They outlined their own organisations tools, which provide ratings and enable public disclosures. When assessing feed, their focus is on transparency and information. They suggested that SSC members could make public disclosures an ask of their feed suppliers. The presenter gave advice on how to risk assess a wide range of ingredients, emphasising the importance of demanding transparency, identifying highest risks (based on company priorities, volumes and ingredients), and supporting pre-competitive platforms such as Supply Chain Roundtables. They mentioned that a Global Marine Ingredients Roundtable is scheduled to launch in October 2021. The presenter suggested that novel fishmeal alternatives deserve investigation, but that most have not been tested at scale and many have environmental tradeoffs (e.g. GHG emissions, energy use, freshwater and marine ecotoxicity, ozone depletion, land use and acidification potential), without clear benefits to fisheries.

1.3 A member suggested that carefully considered public commitments are important for raising awareness and catalysing progress. Another queried why the aquaculture ratings provided by the first presenter only take account of the marine ingredients included in the feed for that source. The presenter recognised that their platform has a fisheries focus, but that their organisation might be open to a more holistic approach to ingredient assessment if there was a clear demand for this from industry. Another member asked about the ethics of feeding wild-caught fish to farmed fish, to which the presenter responded that local conditions must be taken into account, especially where the species used for feed would otherwise be sold for human consumption.

1.4 A second presenter outlined their methodology for risk assessing feed within their seafood ratings programme. They explained that their feed assessment is currently under review, and that they welcome stakeholder questions and feedback on the proposed changes. This presenter shared the concerns of the previous speaker that alternative feed ingredients must be carefully assessed for unintended environmental impacts, and that marine protein is important for the health & welfare of farmed carnivorous fish. However, they also asserted that the growth of aquaculture will require the increase in feed production and that not all of this can come from fisheries. The presenter explained the details of proposed changes to their ratings methodology and the questions asked about a

source within the ratings process. The ratings programme's Unit of Assessment combines: country/region, production method, species and certification status. It is not at a farm level. The presentation focussed on 'feed resources and use', which was last reviewed in 2018. These changes will be opened to consultation and external review.

1.5 Representatives from a third NGO outlined their feed risk assessment methodology. Their methodology is driven by four basic principles: low reliance on wild fish; fish meal and oil sourced from sustainable sources; feed protein efficiently converted into whole fish protein; and low greenhouse gas (GHG) and land use change (LUC) conversion into whole fish. This ratings programme usually assesses at a country or region level, but the feed methodology can be applied at farm level. In the feed context, the programme uses 'sustainable' to mean sourcing sustainable feed ingredients and converting them efficiently with net protein gains. The presenters explained some of the evidence sources which underpin their scoring outcomes, including the Global Feed Lifecycle Institute which hosts a database of life cycle assessment data for feed ingredients.

1.6 A FWG member asked the third NGO about the appetite amongst north American brands and retailers for advocacy, collaboration and proactive engagement with the sustainable seafood movement and particularly with responsible feed initiatives. The presenters explained that their programme has a business engagement team and that they would pass on this interest from the SSC. Another member asked about the specific feed composition data used by the ratings programme, to which the presenter explained that they use their relationships with major feed manufacturers to understand the compositions used and how these might vary over seasons and years.

2. FWG MEMBER DISCUSSION

2.1 Members reflected on the presentations and considered how the perspectives heard might affect the work of the FWG. Overall, members found the overview of presentations very helpful. They were encouraged by the degree of alignment between the direction being taken by the FWG and the recommendations of the presenters.

2.1.1 A member reminded the group that there are NGOs which take the position that marine protein should not play a role in feed supply chains. Another raised the topic of 'sustainable diets', and asked whether responsible retailers should aim to sell more 'low-impact' foods (described as wild-caught using low-impact gear) and less 'high-impact' foods (e.g. farmed carnivorous fish). Another suggested that their volumes are driven by demand, and that the FWG's focus should be on components within their control, for example by setting ambitious targets for aquaculture which might be replicated in other sectors. The group discussed the comparative efficiency of fish at converting feed, making comparisons to terrestrial protein sources (e.g. pork & poultry). A member suggested that we focus on the indicators which can be measured consistently across food production systems in order not to unfairly prejudice risk assessments against aquaculture.

2.1.2 One found it helpful to learn the metrics being measured by the ratings programmes, and particularly the areas with which they have had difficulty accessing data. It was suggested that a FWG activity could involve compiling feed ingredient risk metrics into a table, in a similar style to an existing metrics table for Tuna RFMOs. One member highlighted that they have started doing this work internally, and would be in a position to share it.

2.1.3 A member raised concerns about a widely-used ratings programme whose feed scores are based solely on the reduction fisheries used to source the marine content of feed, noting that this ignores the environmental impacts of alternative feed sources. The group considered its ability to influence this practice.

2.2 Members discussed the FWG's Objectives & Activities document.

2.2.1 For Objective 1 (Knowledge Building), a member suggested inviting representatives from non-aquaculture sectors that use feed ingredients to understand their perspectives. Another countered that aquaculture has developed the responsible feed discussion furthest, particularly in salmon. One pointed to the NFU's net zero target, another to progress in deforestation and land conversion in pig feed and another towards the ongoing revision of the FEMAS standards. Another reminded the group of a disproportionate focus on salmon and on European feedmills and supply chains. A member also highlighted the need to hear from policy makers.

2.2.2 For Objectives 2 and 3, the group agreed to provide feedback and sign-off over email.