

'Responsibly Fed Aquaculture': SSC meeting minutes

Zoom Meeting, 10-12 on 10 December 2020. Number of attendees: 24.

Summary of agreed points

- A Feed Working Group should be initiated to steer the SSC's work on responsibly fed aquaculture.
- 10 members present at the meeting have volunteered to participate in this Working Group. Members unable to attend this meeting will also be invited to participate, with a cap of 12 members.
- Members have proposed a range of next steps (listed below). These should be reviewed, prioritised and carried out as appropriate by the Feed Working Group.

Purpose of the meeting

To discuss responsible feed for aquaculture, and potential SSC activities to support members and prompt wider industry action on the responsible sourcing of fish feed. To learn from each other's perspectives, to start to define the scope of SSC activities in this area and to understand how our role intersects with those of other organisations and initiatives.

Secretariat introduction:

- The secretariat welcomed the group and explained the objectives for the meeting. There was recognition of the complexity of feed sourcing, and that this session could only be the beginning of an SSC dialogue.
- The secretariat presented the existing references to aquaculture feed in the SSC Codes and Guidance. These documents explain risk assessment expectations and traceability measures which should be in place for feed sources.
- The secretariat presented the feed-related findings of the recent SSC Implementation Report, conducted by the external consultancy Charmelien. This report found that:
 - Members understand that feed is within scope of the SSC Codes, and it is often referenced in their sourcing policies.
 - There is some confusion around aquaculture certification schemes and to what extent their assessment of feed sources is sufficient.

- Some members use the Marin Trust standard for assurance, whilst others hope that the Aquaculture Stewardship Council (ASC) feed standard, which is due for publication in 2021, will help to identify best practice.
- Consistency of feed assessment approaches across members is low, and this might be worsened by some ambiguities in the Codes and Guidance documents.

An open discussion followed, which can be grouped into the following themes: reasons to engage; existing initiatives; an aligned vision; cautions and caveats and potential areas for action. The below is a summary of the sentiments expressed under these themes.

Reasons to engage

Members considered the significance of feed in their supply chains, and considered the value of engaging in improvements and alignments.

- The sustainability of feed is a public and pre-competitive concern. When the Codes were first being written (2011), feed was discussed but the details were 'parked' due to complexity and a perceived knowledge gap. General understanding of the tools available to ensure responsible feed sourcing has developed since then.
- There would be great benefit in creating a widely-adopted, credible risk analysis process which helps to determine whether marine and non-marine ingredients meet the criteria for sustainability, as set by market-facing organisations. This is necessary in order to fulfil claims of responsibly sourced aquaculture products.
- The group is in a potentially powerful position to define and incentivise work towards sustainable feed ingredients.
- Feed has implications for the health of the farmed fish (e.g. growth, disease resistance), product quality and the environmental and human rights impacts of the operation. The aquaculture industry is projected to expand over coming decades and demand for sustainable feed ingredients will therefore increase.

Existing initiatives to monitor or engage with

In the interest of avoiding duplication and ensuring that the SSC is making a valuable contribution to the feed landscape, members shared information on existing initiatives.

- Major certification schemes are at very different stages with regard to progress on feed.
- A member explained that they have already been working with an NGO partner to initiate a pre-competitive dialogue on feed, which they hope to be able to announce publicly in February 2021. In scope of that work is: defining the 'sustainable pellet' by 2030; reducing the Forage Fish Dependency Ratio (FFDR) to <1; alignment around the use of alternative ingredients (insects and algae).
- Impressive work has been undertaken in palm and soy supply chains, supported by the 3Keel consultancy and several SSC members. This involves an annual questionnaire for traders of these commodities, developed in conjunction with a network of NGOs.

- The ASC takes a broad risk assessment approach to plant-based feed ingredients. The granularity in their feed standard focusses on land conversion risks associated with soy and palm.
- Several years ago, the Sustainable Fisheries Partnership (SFP) founded a feed roundtable with only the major feed manufacturers. Their policy is to not source anything with an SFP score lower than 6. This is seen to be a low bar.

The need for an aligned vision

A recurring theme was the value of using the SSC to develop a joint position on responsible feed sourcing. This could be used to inform internal processes as well as an advocacy tool to engage external organisations.

- Aligning SSC member expectations & aspirations for feed, and communicating these to feed producers and certification bodies could be the most effective function of the coalition. A collective SSC voice could successfully advocate for positive action from those actors.
- Some members noted that they are already having the relevant conversations, but only on a one-to-one commercial basis. They felt the conversation could benefit from being opened up within a pre-competitive collaboration platform. Another member suggested that the lack of an aligned vision (particularly from seafood buyers) has been a limiting factor in the scaled development of some aquafeed technologies and assessment methodologies.
- Many members reiterated the value of aligning SSC member strategies and definitions for responsible feed sourcing in order to engage with certification standard holders and feed manufacturers. One said "this is the only way to do this".
- Some feed manufacturers appear more willing than others to provide transparency and traceability data. Aligning the questions we ask these businesses (as has been done in palm and soy) would help improve transparency and reduce the burden on feed manufacturers.

Cautions and caveats

Given the scale and complexity of the challenges presented in feed supply chains, members shared the following notes of caution to inform any work on this topic.

- Defining the scope and the challenge at the start of this workstream will be crucial to developing a roadmap to success.
- One of the challenges is that feed is often several steps in the supply chain away from the influence of SSC members. Other supply chain actors will need to be included in this discussion (e.g. feed producers, certification standard holders).
- Concerns were raised about the inclusivity of any developments led by the SSC. One member stressed that any changes should consider how foodservice businesses will be able to adapt to new requirements. Another pointed out that smaller feed manufacturers within lesser-developed supply bases will need support to meet new expectations.

- A truly cross-functional group will be needed in order to understand the implications of any collective feed sourcing decisions or positions. SSC members themselves are not experts specifically in feed.
- Some members suggested that reviews to the SSC Codes & Guidance might not be necessary, and should only be undertaken if significant developments are made in our collective understanding of and alignment on feed sourcing. Others felt that the recommendations made by Charmelien to review these documents should be taken seriously.
- The aquaculture sector is further ahead than many agricultural sectors. Learning from other commodity markets will be helpful but they won't have all the answers.

Next steps for the Feed Working Group to consider

Throughout the discussion, members proposed practical actions which could be taken by the SSC. The Working Group will define its scope and therefore prioritise which of these to take forward:

- A session with 3Keel to understand the steps they have taken with palm and soy supply chains.
- Hearing presentations from the major certification standard holders on the feed elements of their programmes and their plans for development.
- Developing a questionnaire for feed manufacturers which covers priority metrics (e.g. carbon footprint, marine protein species, origins of soy). Share and discuss the output with SSC members, with a view to providing aligned feedback to those manufacturers. This feedback could improve feed businesses' understanding of how they perform against these metrics in comparison to their peers, and encourage progress where necessary.
- Come to an agreement on whether the SSC should focus only on marine ingredients, should also include major terrestrial ingredients, or should develop a sourcing approach for the whole feed ingredient basket. A consensus on this theme was not reached during the meeting. A suggestion was made that fishmeal, fish oil and feed conversion are the big issues which might need attention first.
- Conducting a gap analysis of the resources already available to businesses when risk assessing their feed sources. This could lead to a similar exercise to the SSC Risk Assessment resource sharing project carried out in 2018 but with a feed focus.
- As an initial prompt for action, develop a simple message for the supply base of feed manufacturers. This could stress that feed sustainability matters to buyers, and explain that the SSC is collaborating to identify and prioritise solutions.
- Develop a common SSC position on the use of marine ingredients and explore any unintended consequences of removing them from the feed basket.
- Review the need for updates to the SSC Codes in light of any progress made.