



REBYC-II CTI project

REPORT OF THE PRIVATE SECTOR ROUNDTABLE MEETING

30 April 2012

Jasmine Executive Suites Hotel, Bangkok, Thailand

Background and introductory session

The Private Sector Roundtable meeting was hosted jointly by SEAFDEC, FAO, IFFO and SPF. It was organized in conjunction with the REBYC-II CTI project inception workshop in order to provide inputs into the project planning process with regard to private sector collaboration. More specifically, the objectives of the meeting were to discuss how the industry can engage in the project (at the local, national and regional levels), what the needs of the private sector are, what a successful project would look like and where to go from here.

The meeting was opened by Dr Chumnarn Pongsri, Secretary-General of SEAFDEC, who stressed the importance of the REBYC-II CTI project and its great interest to the private sector.

Mr Petri Suuronen (FAO) gave an overview of the project, its objectives and expected outcomes. He explained that the project explores strategies and measures in trawl fisheries management for ensuring that the benefits are enhanced whilst the risks are reduced. The overarching goal of the project is the sustainable use of fisheries resources and healthier marine ecosystems in the project region.

The 6 main outcomes expected to be delivered by the project include:

- Agreed trawl management plans for the pilot areas
- Improved measures and techniques to reduce problematic bycatch
- Better use of residual bycatch
- Critical barriers for executing responsible fishing by private sector addressed
- Effective incentives identified for trawl operators
- Institutional arrangements and processes for public and private sector partnership.

The project is funded by the Global Environmental Facility (GEF) and the governments of Indonesia, Philippines, Thailand, Vietnam, Papua New Guinea, SEAFDEC, FAO and by various other stakeholders. The project will be run in 2012-2015 in Southeast Asia. SEAFDEC is the Regional Project Facilitator Unit and FAO is the GEF agency for the project.

Presentations

Sustainable Fisheries Partnership (SFP)

Mr Duncan Leadbitter, Technical Director Sustainable Fisheries Partnership (SFP), provided an overview of the story and progress of the SFP, the “fish meal roundtable” and its relationship to the REBYC-II CTI. The SFP is an NGO that was established in 2006 to work with the fishing industry (capture and postharvest sectors) on improving fisheries management. It helps disseminate publically available information (via www.fishsource.com), assists private bodies/companies to implement sustainable policies and encourages stakeholders to consider sustainability. SFP partners with the fishing industry (catching, processing) and retailers globally and also has fisheries improvement partnerships established with companies in South East Asia.

In 2011, several meetings were held in Bangkok with fish feed and meal producers (from Thailand, Vietnam, Malaysia and Indonesia), some European farmed fish/shrimp importers and the International Fishmeal and Fish Oil Organisation (IFFO). Their common interests included the sources of fish meal in South East Asia (trash fish) from trawling and the need for better fisheries management.

It was noted that there is a need for co-management that involves users (in the downstream sub-sector, e.g. meal producers) – not only catchers – in the management processes. If reasonable user needs are not addressed, there is no incentive for industry to comply with rules. Moreover, companies that buy fish have useful data that can assist research and management. Certification schemes may provide both opportunities and requirements that need to be understood (they are increasing in importance in Europe but also in, for example, Japan).

Products from trawl fisheries do not only go into meal but also into other products such as surimi, other processed seafood products and frozen fish and this Private Sector Roundtable meeting could hence be relevant to a wider audience than the earlier Bangkok meetings. Industry support to REBYC-II CTI project will ensure that project results will become beneficial also after project completion.

IFFO's Responsible Supply (RS) Improvers Scheme

Mr Andrew Jackson, Technical Director, IFFO's Responsible Supply (RS) Improvers Scheme, explained how, in recent years, the fishmeal and fish oil industry has faced considerable criticism over the sustainability of its raw materials and the purity and safety of its products. In 2008, this development prompted the industry trade body IFFO to decide to work with a multi-stakeholder group to produce a Global Standard for Responsible Supply for fishmeal and fish oil (RS standard). Working with fishmeal producers, traders, fish feed producers, fish farmers, standard setters, fish processors, retailers and environmental NGO's, IFFO launched its RS standard in late 2009. The RS is an ISO 65 compliant business-to-business standard which certifies fishmeal and fish oil factories as being producers of responsible products following extensive third-part auditing. In order to meet the standard, the factory must be able to demonstrate that it sources any whole fish from fisheries that are managed under the key principles of the FAO Code of Conduct for Responsible Fisheries, that it does not process any illegal, unreported or unregulated (IUU) fish and that any fisheries by-products, in addition to not coming from

IUU, are not from any endangered species. In addition, the factory must demonstrate that it is well managed with a robust quality management system ensuring product purity and safety.

Over 30 percent of world fish meal production is now from factories that have been certified under the RS standard, with around 90 factories having been approved. A number of aquaculture standards, including those from the Global Aquaculture Alliance and some of those from the Aquaculture Stewardship Council, have adopted IFFO-RS as a means of demonstrating the responsible procurement of marine feed ingredients. However, despite having a rapidly growing aquaculture industry, there is currently no IFFO-RS certified material being produced in Asia. This therefore means that any such certified material has to be imported. One of the reasons for this is that much of the fishmeal produced in the area makes use of fish from fisheries that do not have sufficient information to be able to demonstrate that they are being well managed. To help overcome this problem IFFO, working with others, including the SFP, has produced an Improvers' Programme. This Improvers' Programme is designed to allow a factory to demonstrate that over an agreed period of time, and working with others including government, a Fisheries and Factory Improvement Plan will be implemented, at the end of which the factory will be able to meet the RS standard.

It has been recognized that much of the fishmeal in South East Asia does not come from single species pelagic fisheries, which lend themselves to evaluation under the FAO code. For this reason and working with FAO and SFP, IFFO is keen to see the development of a methodology to evaluate the management of mixed species trawling in tropical waters. If such a methodology were available, IFFO could look to have it adopted into its RS standard which would open up the opportunity for locally produced fishmeal to be certified as responsible or at least get on the Improvers Programme for future certification. The REBYC-II CTI project, working as it does with low value fish produced from tropical trawling often destined for fishmeal production, is of great interest to IFFO and it is keen to provide whatever support and encouragement it can to ensure useful outcomes from the project.

What is success?

Mr Bundit Chokesanguan, Head of Information and Training Division SEAFDEC, made a presentation on how to define success and what indicators could be used. He suggested that collaboration could be identified by looking at the number of agencies/institutions/organisations that were involved and the activities carried out. The involvement of stakeholders – number of trawlers, fishermen, crew, fish markets etc – would also illustrate the extent of collaboration. Indicators for *successful* collaboration were similar to those of an overall successful project and could include changes in laws and regulations, increases in fishery resources, improved understanding of bycatch and fisheries management issues on behalf of stakeholders, and the level of government support. During discussions that followed Mr Chokesanguan's presentation, it was also suggested that the number of management plans (developed and/or under implementation), policy changes with regard to sustainable fisheries and the share of regional sources of traceable fishmeal (how imports and regional production evolve) could also be considered useful indicators. It was noted that baselines will be needed to be able to track progress but that there is a general lack of information, e.g. data on how much of trawl catches are converted into fishmeal are generally not available in the different project countries. The same is true for other

indicators relevant to the project: when attempting to limit catches of juveniles and of vulnerable species, it would be important to know the current situation in order to have a baseline against which project impact can be measured.

The discussion also considered other factors (in addition to collaboration) that will influence the success of the project. It was noted that many countries have plans to increase aquaculture production but there is no indication of where fishmeal/feed for this will come from. A strong demand for feed may influence the possibilities of the project to change behavior and attitudes.

It was also noted that the use of wet feed in aquaculture is generally a destructive practice – both the sourcing/fishing and the feeding itself - and it would be desirable to reduce the amount of wet fish as feed (but there is again a lack of baseline information). Collaboration with the Network for Aquacultures Centres in Asia (NACA) could be useful in this respect (development of pelleted feed to avoid use of wet fish feed) but so far NACA has not been involved in the project. There is also an issue with regard to fishmeal quality as the way fish is kept on the vessel will influence the quality of the final fish meal product.

Different stakeholders may have different views on what success of the project means. It is also often difficult to understand what successes a project is responsible for because there are always other factors playing in. Industry tends to be interested in how project activities may influence profits. Project management needs to consider compromises between project objectives and industry wishes, seeking a balance and win-win solutions. Fishers may be happy to make changes but would probably not accept a reduction of profits – then compensation may be required. To get the fishmeal/feed industry to collaborate with the project, the project should emphasize that it will promote a reduction in use of wet fish feed.

Discussions

Mr Dan Fegan, Regional Technical Manager Cargill, facilitated a discussion on how the industry can engage with the REBYC-II CTI project at the local, national and regional levels. Practical solutions have to be found that are acceptable to industry and market, and economic realities have to be considered. There are four different sub-sectors that the project could consult with: the fishing (capture) sector, the fish processors, the fish meal and fish oil producers, and the aquafeed producers. There is a need to identify existing national and regional arrangements. There are probably different networks among trawl fishers organisations, private sector and fishery government agencies in each country that could be useful to project collaborative efforts.

With regard to the private *capture sector*, the meeting noted that an agreement to cooperate with pilot initiatives would contribute to reducing the unwanted and undesirable components of the catch, including juveniles of commercial species and vulnerable species, and reduce destructive impact on habitats. However, this is only going to happen if industry sees incentives to introduce different practices.

The *postharvest sector* could play several important roles. It could, for example, work with the IFFO Improvers Programme, cooperate in pilot areas, work towards improved incentives, encourage cooperation between fishmeal suppliers and feed manufacturers on sustainable aquaculture feed, and assist in communication.

In the continuation of the discussion, a wide variety of comments was received and could be categorized as follows:

1. Gear related questions

- What is meant by trawling? Does the project need to define what type of trawling is covered?
- Multi-species trawling – originally meant to be bottom-trawling (shrimp trawling) but could be broader.
- In the first phase of REBYC project, gear modifications were the focus but now wider management issues and need to look at sector as a whole – including pelagic catch – are recognized.
- Categorization of small-scale and large-scale fisheries is important but how to do this?
- (Small-scale) bottom-trawlers operate especially in inshore areas; large-scale offshore trawlers can change gear and engine power, and can operate over wider areas.
- Another issue to be considered is push-net fishing (widely used practice in SE Asia and banned in some countries).

2. Who is catching what?

- Small scale fishers are common in the region and small-scale trawling is a widely used fishing method. The issues dealing with in the small-scale (trawl) sector are not necessarily the same as in the large-scale. It is important for project to look at the role of small scale trawlers and to encourage small-scale fisheries involvement.
- Small-scale fishing is important for local communities.
- Small-scale fishers are often operating in nursery grounds and are catching large numbers of juveniles – with less value of catch. However, there may be more trash fish (per unit of effort) from large trawlers.
- More bycatch is likely in the near-shore fishing mainly because of large numbers of boats and amount of overall catch.
- Small-scale fishing uses whole catch while large-scale may discard.
- The “bycatch” in small-scale fisheries is important to livelihoods.
- Impact of (small-scale) trawling on other small-scale fishing and competition between different gear users. We may need to include also other categories of fishers in the project.
- How to measure fishing effort/catch and compare over time/between countries if changing/different gear/engine powers?
- There are different problems in different areas of the fisheries/fishing zone.
- Most countries have inshore non-trawling zones but trawling may take place anyway – project needs to address this (illegal) fishing and the competition between different gear users.

- Because of changing markets (more demand for aquaculture feeds) and increasing fuel prices, more bycatch is being landed and has increased catch value in this sense.
- A large part of trash fish is coming from pair trawlers because they are using larger gear and high towing speed; this is generating low quality fish that is not used for human consumption. Small-scale trawlers tend to land higher quality products.

3. Catch characterization

- Project should look at multi-species inshore bottom-trawling creating competition/conflicts and ecosystem damage - this should probably be one of the focus. In offshore “single species” (pelagic) trawling, there may be issues of some bycatch (e.g. turtles) but bycatch is likely to be less of a problem.
- Important to improve quality of catch to increase its value.
- Little is still known about the species composition of trashfish. What species are we talking about? Could be important to identify what species are involved to assess the scope of the problems. This should be part of initial project assessments.
- What are the estimated shares of juveniles and small sized fish in trashfish?
- The amount of trash fish in total catch depends of area. Countries may have data on how much is trashfish out of total catch.
- Note that trash fish catch generally is not considered bycatch. Avoid the use of the term ‘bycatch’, better to use ‘catch’.
- In Philippines, 15-25% of bycatch represent commercially important species.
- With regard to trash fish, how to define juveniles and small sized fish, and how to avoid catching juveniles?
- In SEAFDEC trials, up to 15 species with high share of juveniles.
- Could also be good to release small-sized fish because they would enter the food chain.
- Collaboration needed by SEAFDEC, projects and private sector on promoting fisheries data collection.

4. Market aspects

- Need to ensure that economic drivers are understood. Difficult to make management work if there are strong financial pressures in the way.
- In aquaculture, producers (pangaseus, tilapia etc) are looking for certification and hence looking for sources of fishmeal that are sustainable. Now only possible to use fishmeal from byproducts or import from countries (e.g. Latin America) that have certified fisheries for meal production.
- In the near future (in 2015), there will be a need to also certify source of byproducts. It will be expensive and logistically difficult to import; important to look into other solutions. Otherwise producers in the region may lose market shares.
- What are the risks that regional shrimp producers will lose market shares (to better organised producers elsewhere) in 2015?
- Already now importers in UK asking for origin/species for fishmeal and surimi. Industry is doing research on this. US also starting to have similar requirements but not the same as in Europe.
- Certification requirements are not imposed by governments but from buyers.

- Competition from Latin America likely to increase because more aquaculture certification.
- APFIC workshop 2005 noting competition human consumption and aquaculture and recommending increased conversion of trashfish into fish for human consumption.
- Recent review indicates that better disaggregation of catch and trashfish reduced – with a higher portion of edible fish – for production of surimi.
- How is bycatch/trashfish used in the areas identified for the project?
 - Philippines (Samar Sea): direct aquaculture feed
 - Thailand (Gulf of Thailand – selected provinces): direct aquaculture feed (10%); the rest fishmeal
 - Vietnam: direct aquaculture feed, fishmeal and fish sauce.
 - Indonesia (Arafura): surimi and fishmeal

5. Management aspects

- Two level question: what species are in trashfish and what are safe (sustainable) to use for fishmeal.
- Some seasons in some areas, more juveniles (Indian mackerel, trevally) than in other seasons and areas. Management plan with a mix of measures is needed!
- In Peru, in anchovy fishery, the fishery closes if the catch includes a certain percentage of juveniles.
- It should be noted that it tends to be difficult to enforce regulations if not enough engagement by fishers.
- In the project region, closed areas are often used because large number of boats and difficulties in monitoring
- Is it possible to identify the seasons and areas that would need to be enclosed? What are the possibilities for self enforcement? Awareness raising very important!
- In the project, the different components are linked where lessons learnt in component 2 should inform policy in component 1 and awareness raising in component 4.
- Also very important to work together with the sector to identify what measures should be put in place. The project is not a research project (for government research institutions) although its execution is aligned to scientific information; it should also be based on communication with private sector – only way to get information quickly enough.

Other feedback from the workshop participants covered the following aspects:

- To get inputs and promote collaboration with private industry, national project teams may want to visit a selected number of companies (4-5) rather than (only) call them to large meetings.
- Fishing operations often span several countries. Many trawl operators in the region and in REBYC-II CTI countries operate in joint venture with non-project country operators. Regional REBYC-II CTI activities may hence cover also other South East Asia countries and make links with other existing SEAFDEC projects (on responsible fishing). Also IFFO is involved in other countries in the region.
- The ILO/Thailand is interested in the trawl fishery to ensure decent employment conditions. It believes that the Project should contact national fishing and postharvest associations.

- The Thai Overseas Fishing Association represents companies that fish outside of Thai national waters. Some companies fish in the Arafura Sea for products such as surimi. Trash fish is being used but it is not generally known what species are included in that catch component. They would be willing to collaborate in the project.
- There are specific needs with regard to the fish meal sector and there is a lack of regulations at the moment with regard to sustainability in the production of fishmeal. The first step is to know what goes into fishmeal? Fishmeal producers need to communicate to project what are the species used for the project to work on this. This may well be a research question. It may not be possible for crew on trawlers to find out but project could put people onboard or at landing sites to find out the species. Maybe a lot of the trash fish are not juveniles but rather small species – need to know! Requires access to samples of landings.
- Sectors and sub sectors involved in the project: not only bottom trawl – some modified gear to include pelagic catches too. There is also an informal sector trading in trash fish. Project needs to include the informal sector.
- In 2015, certified aquaculture products will have to use feed that has been sourced sustainably.
- In order to ensure sustainable sourcing, traceability is important. Any initiatives for improving traceability in the region?
- The Thailand Fish Marketing Organisation (FMO) would like to be included in the project and put forward the following information (by Ms Supavadee Poolanan): *Our mission is providing service and facilities for fish marketing and fish unloading with appropriate standard. Thailand possesses the coastline along the Southern and Eastern side of the country. We can communicate to fishermen and entrepreneur about fishery and raise awareness in the sector, including post harvest, to reduce bycatch. FMO have fisheries promotion division activities and co-operates with SEAFDEC, Department of Fisheries and other involved institution. A potential province for the pilot project could be Ranong, Pattani, Huahin and Chumporn.*

Wrap-up and concluding session

Mr Leadbitter summarized the meeting and noted that industry engagement in the REBYC-II CTI project will be important for sustainability and long lasting changes. Without the private sector, it will be difficult to achieve much. It should be remembered that the private sector includes not only the large-scale fishing sector but also small-scale fishers and the processing and distribution sub-sectors.

The project needs to consider what the best way is to engage with the private sector. This would include identifying what the project has to offer the private sector (what are the value propositions that can be made). It will also be important to agree on project success indicators that can be understood by the private sector as well as by other partners (governments and NGOs).

This one-day meeting was just a start for the private sector collaboration and there is a need to establish mechanisms at both the national and regional levels. There may be a need for different types of communication mechanisms for different segments of the private sector – e.g. small-scale and large-scale operations, and for different products with different value chain patterns. Some suggestions with regard to cost effective communication channels included:

- Emails (low cost but not always effective).
- Roundtable discussions including both private sector and government.
- Websites, new letters etc.
- Project participation in private sector meetings.
- Regional networking among (private) associations (e.g., collaboration USAID project).

Links with other projects and initiatives – also outside the project geographical area – should be considered as well as cross-sectoral links with other products and value chains. There is also a need to know more about what species are being caught, where and when, and how this relates to fishery or ecological effects. By knowing more, the project can sharpen its focus on specific species, gear types and issues (e.g. juveniles) and from there better identify private sector partnership solutions.

Summary of meeting findings

- Industry involvement in the project is one of the key requirements to its success
- Different consultation and communications mechanisms for different sectors, e.g. small vs large scale, different products (fresh/frozen, surimi, fish meal etc)
- Day's workshop just the start – need to establish mechanisms at national and local levels.
- Define clearly what issues are the focus - gear type, species and issues (e.g. juveniles)
- Need to identify indicators of success and baseline conditions.
- What is the value proposition for the industry
- What collaboration and synergies with other projects?

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