



The IFFO Improvers Programme – a means to encourage and demonstrate commitment to the responsible production of fishmeal for aquaculture

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IFFO

International Fishmeal and Fish Oil Organisation is the global trade association representing fishmeal and fish oil producers and related trades.

Represents two thirds of world production and 80% of trade in fishmeal and fish oil worldwide with producers in Europe, South America, Africa, USA, China and India.



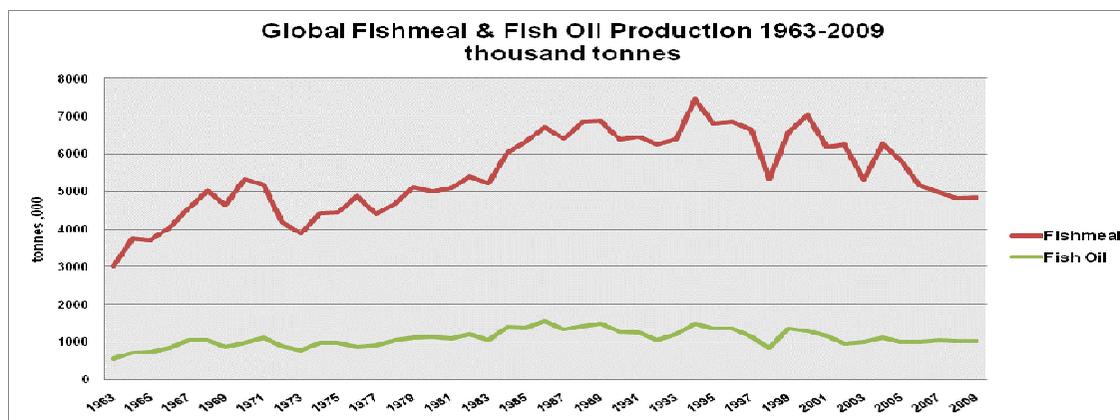


Important feed ingredients

Fishmeal is an excellent high protein feed ingredient used at least at some stage in almost all intensive aquaculture systems and also commonly in pig feeds

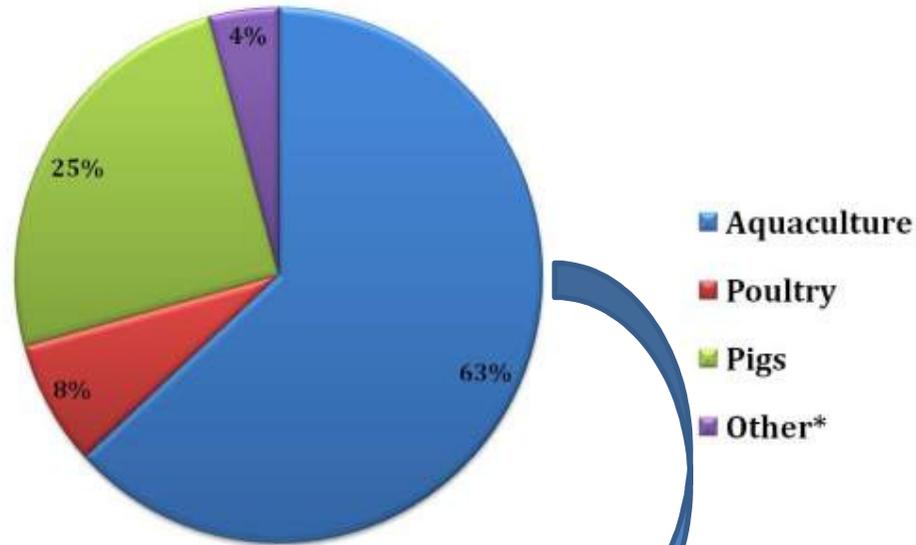
Fish oil is the best source of the omega-3 fatty acids EPA & DHA and its use in feeds ensures a healthy product for the final consumer

However, despite the growth of aquaculture the global production of both fishmeal & fish oil has remained fairly static



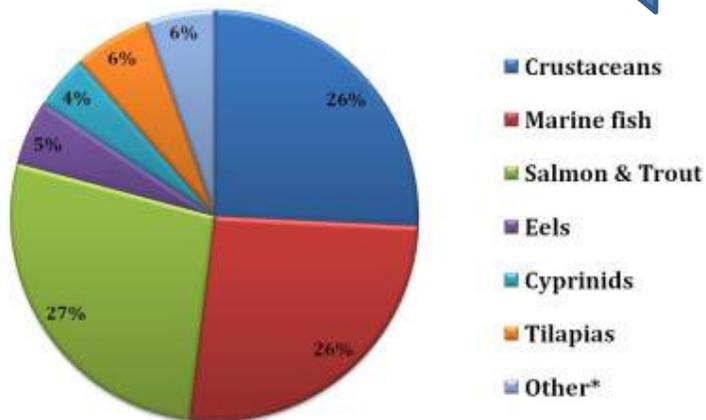
IFFO data

PERCENTAGE OF FISHMEAL USAGE PER MARKET 2009



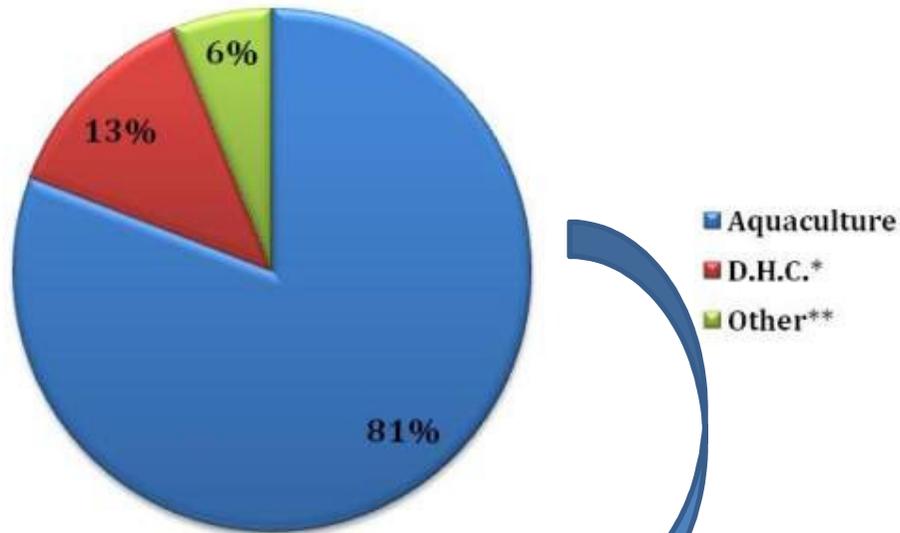
IFFO data

PERCENTAGE OF FISHMEAL USAGE IN AQUACULTURE 2009



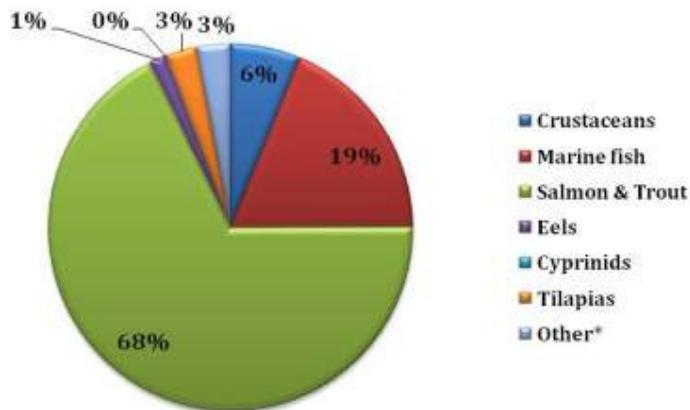
We estimate that in 2009 63% of global fishmeal production went to aquaculture and that was split almost equally between salmonids, marine fish, crustacean and others.

PERCENTAGE OF FISH OIL USAGE PER MARKET 2009



We estimate that in 2009 81% of global fish oil production went to aquaculture and that 68% of that went to salmonids.

PERCENTAGE OF FISH OIL USAGE IN AQUACULTURE 2009



•Direct Human Consumption,
 •** Other usage including fat hydrogenation & industrial use
 Source IFFO

Eco-efficiency of fishmeal & fish oil

Seasonal surplus of less desirable fish and inedible by-products are collected.

They are efficiently converted into concentrated stable products which can be economically shipped to where they are required



There is continued value chain concern over two critical areas



The need to demonstrate that any whole fish processed come from well managed fisheries and that there are no illegal, unreported or unregulated (IUU) fish included. Also that any fisheries by-products do not come from endangered or IUU fish



The need to demonstrate that production in the factory ensures pure and safe products. Also that the supply-chain then maintains the purity and identity of the products with a chain of custody demonstrating traceability





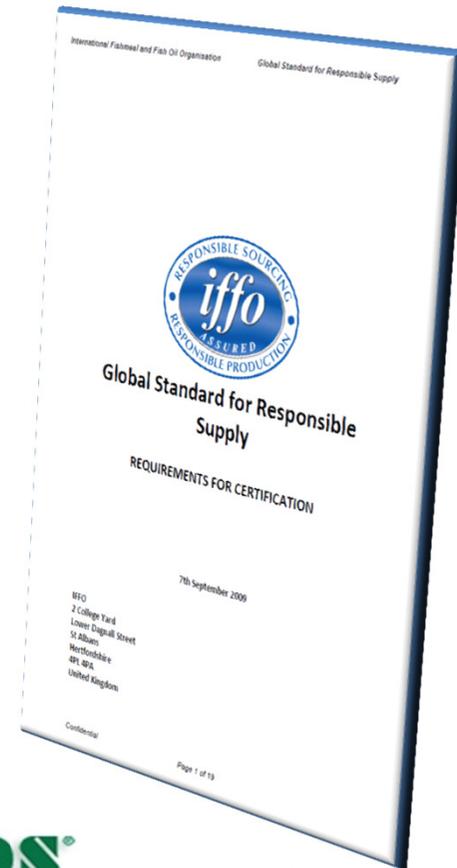
IFFO developed its Global Standard for Responsible Supply (IFFO RS)

RS is a B-to-B initiative following the ISO-65 Standard

Standard developed by multi-stakeholder committee including producers, traders, feed companies, fish farmers, major retailers, standard setters & NGOs

A 3rd party Certification Body was appointed to conduct audits into each application

Currently undergoing ISO 65 Accreditation to ensure compliance with ISO-65





To comply with the Global Standard for Responsible Supply (RS) a factory must:

Source its whole-fish raw material from fisheries managed according to the FAO Code of Conduct for Responsible Fisheries (MSC certification is accepted as proof of this)

Avoid the use of Illegal, Unreported & Unregulated fish (IUU)

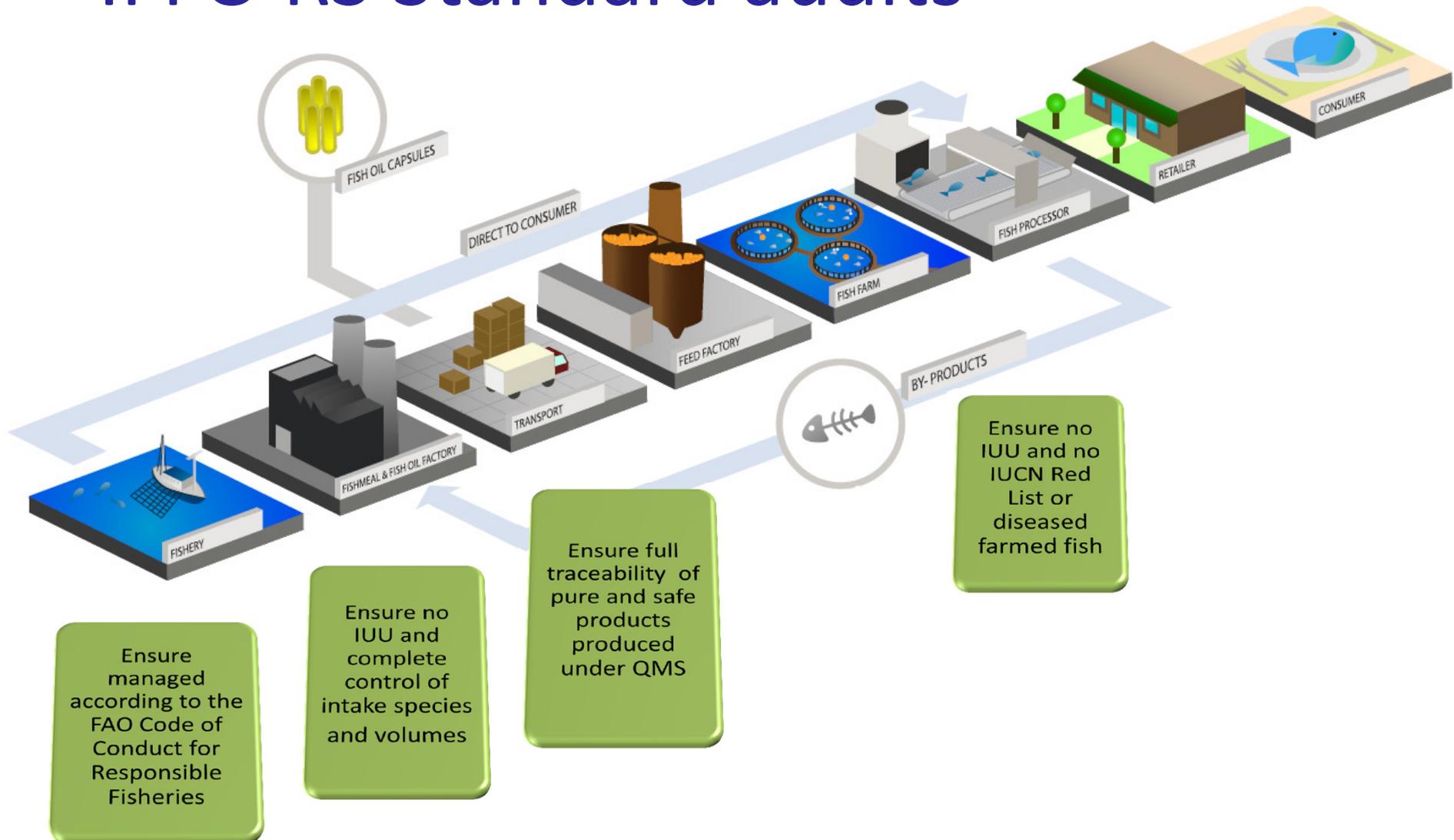
Not source fisheries by-products from IUCN red listed fisheries or from IUU fish

Manufacture under a recognised quality control scheme to ensure product safety, purity & traceability





IFFO RS Standard audits





Summary Table of Fishery Assessment

SUMMARY OF LEVEL OF COMPLIANCE					
	The Management Framework and Procedures	Stock assessment procedures and management advice	Precautionary approach	Management measures	Implementation
legal and administrative basis	A1				
Fisheries management should be concerned with the whole stock unit	A2				
Management actions should be scientifically based	A3				
Research in support of fisheries conservation and management should exist		B1			
Best scientific evidence available should be taken into account when designing conservation and management measures		B2			
The precautionary approach is applied in the formulation of management plans			C1		
The level of fishing permitted should be set according to management advice given by research organisations				D1	
Where excess fishing capacity exist, mechanisms should be in established to reduced capacity				D2	
Management measures should ensure that fishing gear and fishing practices do not have a significant impact on non-target species and the physical environment				D3	
A framework for sanctions of violation of laws and regulations should be efficiently exists					E1
A management system for fisheries control and enforcement should be established					E2

KEY:

Low Compliance:



Medium Compliance:



High Compliance:





Roles in the Value-chain

IFFO RS with Chain of Custody



MSC



IFFO RS with MSC





IFFO-RS progress to date - 1

Launched
to
members
in October
2009

First factory
was
awarded
certification
in February
2010

Country	Fishery	N° of companies	N° of certified factories	N° of factories pending certification
Peru	Peruvian anchovy (<i>Engraulis ringens</i>)	10	53	7
USA	Gulf menhaden (<i>Brevoortia patronus</i>)	3	3	0
	Blue whiting (<i>Micromesistius poutassou</i>)			
	Atlanto spring spawning herring (<i>Clupea harengus</i>)			
Iceland	Capelin (<i>Mallotus villosus</i>)	7	9	2
	Summer spawning herring (<i>Clupea harengus</i>)			
	6 Species of By-products			
	Norway pout (<i>Trisopterus esmarkii</i>)			
Denmark	Sand eel (<i>Ammodytes marinus</i>)	2	3	0
	2 Species of By-products			
UK/Ireland	19 Species of By-products	1	3	0
Norway	1 species of By-product	1	2	0
	Total	24	73	9



IFFO-RS progress to date - 2

This represents
over 25% of
world production
of fishmeal and
fish oil

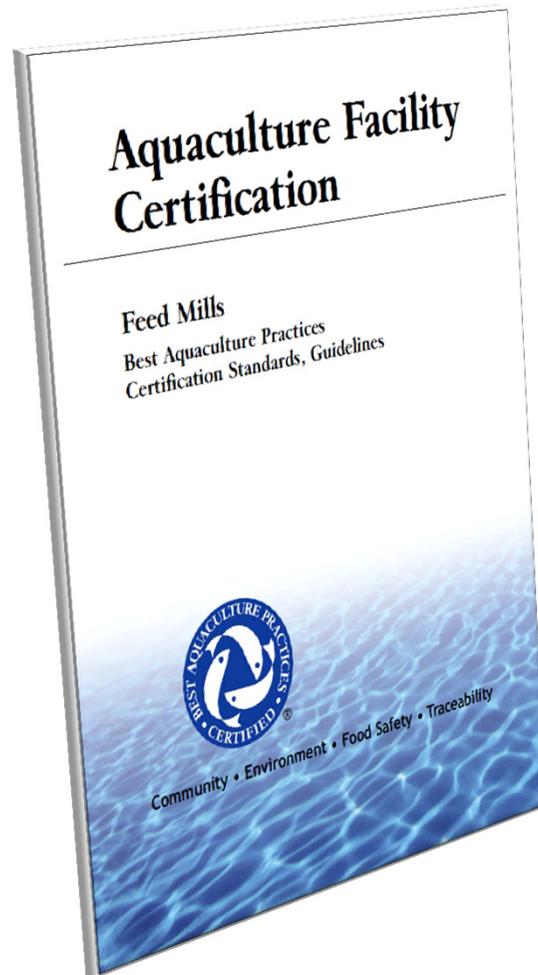
There are more
factories with
their fisheries &
by-products in
assessment
including in new
countries

The IFFO-RS
standard is under
continuous
development e.g.
Chain-of-Custody,
Improvers
programme

The programme
is currently
undergoing
Accreditation to
ISO 65



Acceptance by GAA BAP standard



After June 1, 2015, 50% of all fishmeal and fish oil from reduction fisheries shall be certified as compliant with approved standards. The preferred approved standard is the Marine Stewardship Council Environmental Standard for Sustainable Fishing (ISEAL compliant), provided it is combined with the MSC chain of custody compliance for the producing factory. The secondary approved standard is the Global Standard for Responsible Supply of the International Fishmeal and Fish Oil Organization (ISO 65 compliant), which includes the fishery as well as traceability, and good manufacturing practice for the producing factory.



Inclusion in draft ASC standards

SALMON AQUACULTURE DIALOGUE

Second draft standards for responsible salmon aquaculture

Auditing guidance

The International Fishmeal and Fish Oil Organization's Global Standard for Responsible Supply is one option for demonstrating compliance with standards related to traceability of fishmeal and fish oil, as well as the exclusion of by-products from IUU catch and vulnerable, endangered, and critically endangered fisheries.



Improvers' Programme under development

There are a lot of factories which cannot achieve the RS standard – particularly in Asia

Often the reason is the lack of fisheries management data

We wish to encourage fisheries and factory improvement

We are working with the help of others, particularly SFP to produce an IFFO Improvers' Programme



Improvers' Programme -how it works

The applicant applies to IFFO to be accepted on the IP

An initial assessment is conducted to identify the issues

A stakeholder committee is formed consisting of: applicant, IFFO, fishing interests, Government bodies, FIP specialists (SFP), FAO and funding bodies

The Fisheries Improvement Plan and the Factory Improvement Plan form the IFFO Action Plan which includes auditable milestones

The plan length varies according to the issues

If the plan is adhered to on completion the applicant should be able to achieve the RS Standard



IP funding

FAO are very supportive of the IP initiative

With their help we are seeking funding for the applicants particularly for the fishery improvement

However, progress is slow with this sort of funding



Next steps

IFFO & SFP are holding a roundtable meeting in Bangkok end November

All input welcome

By the end of the meeting we hope to launch the programme

We would like to have two good candidates as early adopters

