

April 26<sup>th</sup> 2019

## **Frequently asked questions (FAQ)**

### I/ The report

#### **1.This report publicizes the issues regarding fisheries in South East Asia.**

##### **Why did you order it?**

IFFO understands the complexity of the issues in the region relating to fishmeal production. The fishing industry and supply chain wants to be proactive in driving information gathering and identifying recommendations for improvements. Understanding the historical, cultural and ecological frameworks in which these fisheries have developed and currently operate is important before undertaking critical action to accelerate change.

In SEA countries, information is often lacking in terms of both fisheries and fisheries production. The supply of comprehensive and up-to-date information is of significant importance to the sustainability of the aquaculture supply chain and fishmeal and fish oil production in this region.

#### **2.Why did you choose to focus on Thailand and Vietnam in particular?**

The focus has been on Thailand and Vietnam given their importance in fishmeal and fish oil manufacture and supply and their important role in aquaculture production. Moreover, they represent two distinct cases whose studies can complement each other.

#### **3.What was the methodology used to produce this report?**

This report, which was commissioned in July 2017, was jointly funded by the Global Aquaculture Alliance (GAA) and IFFO, The Marine Ingredients Organisation. It was produced by Duncan Leadbitter (Fish Matter Pty Ltd – [www.fishmatter.com.au](http://www.fishmatter.com.au)) after approximately 10 months of data gathering, using both publicly available information and in-country sources.

The study looks at the issues from the perspective of social, economic and environmental sustainability, identifies where improvements may be made, and comes up with recommendations to enable increasingly responsible supplies of fishmeal.

#### **4.How can such a report help to improve fisheries management practices, and also engage with some of the social issues in the region?**

The fisheries that supply a large proportion of the raw material for fishmeal production in tropical Asia are quite different from those that occur in more temperate waters. In addition to the very large number of species involved there appear to be very few dedicated ‘reduction’ fisheries where the main product is fishmeal. The

fisheries in tropical Asia supply a wide variety of products and thus support a large number of fishers and seafood processing workers.

Developing a good understanding of how these fisheries work and their role in rural communities is important for designing programs that work with people and their governments.

### **5. How long could it take?**

Effective change is a long-term strategy which requires commitment from all stakeholders and in particular from regulators who hold the key to long term solutions. The length of the process differs from one case to another.

### **6. Why would companies engage with the report's recommendations?**

The incentives for companies to engage in driving reform in fisheries are varied and may include:

- pursuit of market opportunities,
- protection from damaging publicity
- business obligation (market access requirements)
- corporate social responsibility commitments.

## II/SEA fisheries

### **7.How much raw material for fishmeal and fish oil (FMFO) do the SEA fisheries provide compared to the fisheries from other regions? Which markets do they supply?**

The SEA fisheries provide a significant volume of raw material for fishmeal and fish oil (FMFO) production, which is supplied into the aquafeed markets in SEA for manufacture of feed for the regional aquaculture industry. Depending on which countries are included the amount of raw material used for fishmeal could be of the order 10 million tonnes, much of which does not appear in the usual statistics quoted for fishmeal/oil production as it does not come from 'traditional' reduction fisheries.

### **8.Do the SEA countries seem to be willing to improve their practices and cooperation?**

The transboundary nature of many fish resources encourages the SEA countries to collaborate on a variety of issues relating to species research or monitoring and enforcement: a number of guidance documents and agreements have been ratified at a global and at a regional level. There are forums for information gathering, research, training and coordination. However, there is no mechanism for coordinating stock assessments, establishing agreements on catches or reporting on landings. This is an important factor – fish stocks tend to move and do not respect national boundaries.

The two countries on which the report has focused have shown their willingness to improve their practices through dedicated plans including monitoring and evaluation tools to ensure their implementation.

### **9.What has already started improving in SEA fisheries?**

Scarcity of supply plus competition from higher quality fishmeal derived from trimmings resulting from seafood processing, has helped drive improvements. Another driver is the growth in certification schemes for both fisheries and aquaculture.

### **10.What are the differences between Thailand and Vietnam regarding fisheries issues?**

In Thailand, today, there are a large number of relatively small players with no company being dominant. Production has been relatively steady, albeit variable year on year. Changes in demand from local users of fishmeal have also had a big impact. The shrimp farming industry has been through several major disease outbreaks over the past few decades which have cut production and reduced the demand for local fishmeal.

The industry in Thailand is well documented.

In Vietnam, the diverse nature of the industry also makes the collection of statistical data very challenging. There are some significant tasks, particularly in regards to the sustainability of raw materials derived from wild capture fisheries. The industry is facing a future where the profitable way forward is producing high quality fishmeal, and wild stocks need to be either rebuilt, tightly managed or, more commonly, both in order to achieve this.

### **11. Why is information lacking about SEA fisheries?**

In SE Asia the diverse nature of the industry, and especially the size of the small vessel/near shore fleet, makes the collection of statistical data very challenging.

The supply of comprehensive and up-to-date information is of significant importance to the sustainability of the aquaculture supply chain and fishmeal and fish oil production in these two countries, and the wider region.

### **12. The multispecies fisheries typical of the region are notoriously difficult to manage in comparison to other more well-known fisheries around the world. What has the fisheries industry, and IFFO, done so far to improve these practices?**

It is true to say that multispecies fisheries, of the types common in tropical countries, have proven challenging to manage. These fisheries may contain over one hundred targeted food fish species, and as a consequence are extremely complex in nature. Traditional fisheries management techniques have often focused on single species, or a small number of species, that are dominant in a marine ecosystem. In many ways it is true to say that the science is still developing on this subject but there is sufficient known for it to be possible to make decisions that protect both fish and livelihoods. The big challenge with any approach to be made with these multispecies fisheries is to bring to the fore the sorts of trade-offs between jobs, production, stock status and environmental protection that can be found to differing degrees in all fisheries.

Issues relating to multispecies fisheries are interlinked in some way with other issues (lack of regulation, poor data and inadequate enforcement). Some may be tractable indirectly via collaboration with fishery science and management experts. IFFO RS has taken some initiatives in this regards with the assistance of funding from the US NOAA that has generated a promising engagement with the Food and Agriculture Organisation (FAO). Last November, IFFO RS launched its multispecies criteria to be tested during the next 3 years with relevant fisheries such as mixed trawl fisheries in SE Asia. During this period, the pilot will work as a part of the IFFO RS Improver Programme (IFFO RS IP). The pilot will be considered as one of the requirements for acceptance on to the IFFO RS Improver Programme and over time work towards full IFFO RS approval.

### III/ FIPs

#### **13. What is a FIP?**

Fishery improvement projects are mechanisms for engaging the post-harvest sector (supply chain actors not involved in the catching of fish) in certain aspects of the management of fisheries. They represent a relatively new variant on long established approaches to engaging stakeholders in managing fisheries.

The basic elements of a FIP are listed as follows:

1. The establishment of a stakeholder group to drive the process
2. Preparation of a gap analysis that identifies the gaps in performance between the fishery and the desired goal (e.g. the requirements of a standard)
3. The preparation of an action plan that specifies time-bound actions required to address the gaps
4. A mechanism for reporting on progress on a timely basis

#### **14. Where should any prospective FIPs be implemented?**

There are clear opportunities for FIPs in the SEA region, but success here, as with any FIPs around the world, is dependent on stakeholders, and especially industry and government, working together. They need to be time constrained and backed with a resource that permits some supporting activities such as data collection and reporting, stock modelling and quota setting, surveillance and enforcement. Fortunately most governments in Asia recognise the need for reform and having a supportive private sector helps create the sorts of partnerships required. The fishmeal/oil sector is an important player in the region and needs to be proactive in securing good fisheries management, not only for its own needs but for the other beneficiaries of these multispecies fisheries.

#### **15. Who can be involved in Fishery Improvement Projects?**

Whilst there is no restriction (except where set out in law/regulation) on who may participate in a FIP the vast majority of examples reviewed in the literature include only the catching sector and the government (scientists and managers). In some jurisdictions NGOs and the recreational fishing sector can be involved. The development of FIPs has expanded this involvement to include the post harvest sector, which adds a new dimension but the overall concept of co-management is flexible enough to accommodate this variation

#### **16. Can you quote some FIPs that proved to be successful?**

FIPs have been implemented since at least 2006 and there is a [good body of evidence building that shows their effectiveness](#). Those authors concluded that the probability of achieving improvements in management and overfishing is higher for fisheries with FIPs than those without. They are an increasingly well-recognised method for positive step-change in fisheries management.

#### **17. FIPs have faced criticism in particular regarding the improvement pace (slow progress). What can you say to that?**

Fisheries management requires a commitment from all the stakeholders and especially of governments. It is the role of government to make decisions regarding who may access fisheries common property resources.

FIPs require real funds and in-kind contributions to enable progress to be made. Moreover FIP participants need to be flexible in determining what the FIP may be able to achieve: whilst setting goals is important, creating unrealistic expectations, especially by putting in place unrealistic timelines, can be counterproductive. With so many stakeholders involved, and a precise need for resource to support the activities in a FIP, they tend to be complex in nature. Sometimes the challenges are reflected in delays and extending timelines, but they are an effective way of making positive impacts on fisheries.

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For further information contact:

GAA: Steven Hedlund  
E: [steven.hedlund@aquaculturealliance.org](mailto:steven.hedlund@aquaculturealliance.org)  
T: +1-603-317-5085

IFFO: Veronique Jamin  
E: [secretariat@iffo.net](mailto:secretariat@iffo.net)  
T: +44 (0)2030 539 195

#### **About IFFO**

IFFO represents the marine ingredients industry worldwide. IFFO's members reside in more than 50 countries, account for over 50% of world production and 75% of the fishmeal and fish oil traded worldwide. Approximately 5 million tonnes of fishmeal are produced each year globally, together with 1 million tonnes of fish oil. IFFO's headquarters are located in London in the United Kingdom and it also has offices in Lima, Peru, and in Beijing, China. IFFO is an accredited Observer to the UN Food and Agriculture Organisation (FAO). To find out more, visit [www.iffo.net](http://www.iffo.net).

#### **About GAA**

The Global Aquaculture Alliance is an international, non-profit trade association dedicated to advancing environmentally and socially responsible aquaculture. Through the development of its Best Aquaculture Practices certification standards, GAA has become the leading standards-setting organization for aquaculture seafood. To find out more, visit <https://www.aquaculturealliance.org/>