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SUMMARY

ASSESSMENT OF ON-PACK, WILD-CAPTURE SEAFOOD SUSTAINABILITY CERTIFICATION PROGRAMMES AND SEAFOOD ECOLABELS



An independent assessment
by Accenture Development
Partners (ADP)

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Accenture, through its international development unit, Accenture Development Partners (ADP) has supported WWF in conducting a thorough and structured Assessment of sustainable Wild-Capture Seafood Ecolabelling Schemes (further referred to as "Ecolabels"). Accenture is not technically or scientifically expert in this arena, nor are they stakeholders or an interested party in the field of marine conservation. The scope of Accenture's support was to apply Accenture's approach methodology and experience with other assessment exercises to develop and execute the review. Accenture was not engaged in identifying the Ecolabel inventory or in developing the assessment criteria. Since Accenture did not review or comment on the criteria, Accenture takes no responsibility for the resultant ranking of labels.

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Introduction

Over the past five decades, fisheries practices and management systems have depleted wild stocks, degraded marine habitats, and reduced marine biodiversity and ecosystem function. Despite global recognition of these issues, poor fishing practices continue to negatively impact ocean health.

In response to growing public awareness of these negative impacts, an increasing number of market-based ecolabels and sustainability certification programmes for wild capture seafood products have been created to try to stem the decline. The concept behind such product labelling schemes is to provide economic incentives to producers and the seafood industry to adopt more sustainable fishing practices while safeguarding or enhancing access to consumer markets.

Seafood ecolabelling today – trends and outlook

The growth of seafood ecolabels over the last ten years attests to the strong demand from consumers and seafood companies who want seafood from 'better fisheries'. As well as a proliferation of labelling schemes, the sustainable seafood realm has matured to include a relatively comprehensive inter-governmental policy framework, many national level policy approaches, consumer outreach campaigns, and active seafood supply chain engagement.

It is also evident that in addition to concerns about the ecological footprint of fisheries, other issues such as carbon footprint, the environmental impacts of seafood production, social issues such as workers' rights and 'fair trade', and animal welfare are growing in the public consciousness, at least in very developed ethical consumer markets such as the United Kingdom and Switzerland. Whilst developments are underway to bring these issues into seafood ecolabelling in some instances, the seafood ecolabelling community needs to develop internationally agreed criteria for priority issues, and secondly, it needs to develop evaluation mechanisms. However, trying to incorporate these issues within seafood ecolabelling is presently fraught with technical challenges.

It is a massive undertaking to develop a robust, comprehensive and credible ecolabel, especially for the complexities of wild capture seafood. The range of claims made and the variability of the impact different labelling programmes are having are proliferating along with the number and range of seafood ecolabelling initiatives. The risk of potential confusion, or worse still a lack of confidence in seafood ecolabelling, amongst buyers along the supply chain (processors, retail seafood outlets, chefs, or the end consumer) only increases. Clearly, there is a need to ensure the credibility of seafood ecolabels if the overarching goal of improving the sustainability of marine fisheries is to be achieved. There has been an increasingly loud call for clear and independent evaluation of existing seafood ecolabels, including at the April 2009 workshop in The Hague hosted by the Organisation for Economic Co-operation and Development (OECD).

One of the big questions facing marine fisheries certification is “What makes a credible and practical fisheries or seafood ecolabel?” WWF recognizes that the market for seafood ecolabels has grown considerably, and that the issues of the 1990s (when seafood ecolabelling began) are now complemented by the other challenges mentioned above. Do any wild capture seafood ecolabels address these additional concerns? Which labels have the greatest impact on improving fishery and marine ecosystem health? Are there opportunities for labels to improve or be harmonized to ensure credible sustainability criteria are common to all? Which ecolabel(s) are sufficiently rigorous to have an effect on fisheries management? Which ecolabel(s) should WWF support?

To advance sustainable fishing and increase confidence in seafood ecolabelling, WWF developed a set of criteria that reflect ‘best practice’ for fisheries ecolabelling certification schemes. As the “Guidelines on Ecolabelling of Fish and Fishery Products from Marine Capture Fisheries” (FAO, 2005) are an accepted minimum standard for credible, robust, fisheries ecolabelling schemes, they formed the basis for the study criteria. The process standards developed by the International Social and Environmental Accreditation and Labelling Alliance (ISEAL) and some elements from WWF’s framework for ecosystem-based management of marine fisheries¹ were added.

WWF contracted an independent management consultancy, Accenture’s non-profit practice Accenture Development Partnerships (ADP), to assess a provided inventory of sustainability programmes making varying sustainability claims, against these criteria. The assessment² was commissioned to both provide an objective review for seafood buyers and seafood ecolabelling professionals and inform WWF’s positioning on these issues.

¹ *“Policy Proposals and Operational Guidance for Ecosystem-Based Management of Marine Capture Fisheries”* (Ward et al, 2002)

² *Assessment of On-Pack, Wild-Capture Seafood Sustainability Certification Programmes and Seafood Ecolabels.* Accenture. WWF International. 2009.

ADP’s assessment was primarily a **quantitative** assessment of various ecolabels in **addressing the impact of fishing on the marine environment through how they assess and certify fishing and management systems.** Other impacts such as **carbon footprint, environmental impacts of production, social issues and animal welfare** could be described only **qualitatively**, given the relative youth of these emerging areas in seafood ecolabelling, and the lack of any specific internationally agreed criteria akin to the FAO’s Guidelines. Although no single seafood ecolabel currently effectively addresses all of these emerging areas, the study sought to find examples of better practice to improve seafood ecolabelling.

Because the scope and objectives of ecolabel schemes vary widely, the assessment initially clarified a schemes’ scope, its geographical coverage, and the kinds of products that can be certified and/or labelled under it. Other major dimensions of ecolabelling schemes considered include:

- 1) Independence - who established the scheme? (Is it a self declared scheme, or established by an industry association, or is it a ‘third party scheme’ established by an independent entity?).
- 2) Transparency - who is responsible for running the scheme?; and
- 3) Inclusiveness - is participation in the scheme mandatory or voluntary? (i.e., participation and openness).

The most credible ecolabelling schemes accepted in international fora such as the World Trade Organisation (WTO), the International Standards Organisation (ISO), the Food and Agricultural Organisation (FAO) and the International Social and Environmental Accreditation and Labelling (ISEAL) are voluntary, third party and operated independently of those with interests in the issue in question but involving those interested parties. Third party schemes are generally thought to offer buyers of

labelled products the greatest confidence and levels of credibility because compliance with criteria is usually based on verifiable, impartial and transparent certification procedures and standards. Schemes that are mandatory (often government-backed) or restricted to certain types of entrants may also not meet the standards that prohibit barriers to foreign trade under WTO rules. The FAO Guidelines require ecolabelling schemes to be voluntary.

All originally identified sustainability programmes were classified into four different categories and subjected to a qualitative and quantitative review that identified a range of ecolabel types. A few were excluded from the study because of the lack of publicly available information. Based on this initial screening, selected ecolabels were quantitatively assessed (against WWF's criteria- see box below) in all areas of their potential impact on sustainable fishing and fishery management systems. The study also examined a select number of additional seafood certification programmes, comparing their relative strengths and weaknesses in emerging areas such as carbon footprint. This enabled the study to highlight broader dimensions of existing best practice in sustainable fisheries certification. A hierarchical, multi-criteria analytical approach was developed, separating ecolabel schemes into logical, manageable elements for analysis and comparison. A total of 103 criteria, weighted evenly within each performance area ('topic') were used. The values assigned to the segments were simple metrics to enable comparability between schemes in each area assessed.

It should be noted that this was a desk study limited only to publicly available information. All included ecolabel schemes were requested to verify their schemes' information. No effort was made to evaluate, verify, critically review and/ or affirm the actual truth of the programmes' sustainability claims and standards in the fisheries themselves. Hence, this assessment study is only an evaluation of programmes against each other, based on their claims and was not an audit of their performance.

Theme 1: Governance, Structure and Procedures
(how a scheme is governed and operated)

Topic 1 – Standard Setting Structures and Procedures

Topic 2 – Accreditation and Certification Structures

Topic 3 – Accreditation and Certification Procedures

Theme 2: Content of Standards

(the content and quality of standards used by the scheme)

Topic 4 – Ecological Criteria

Topic 5 – Fishery Management System

Topic 6 – Traceability

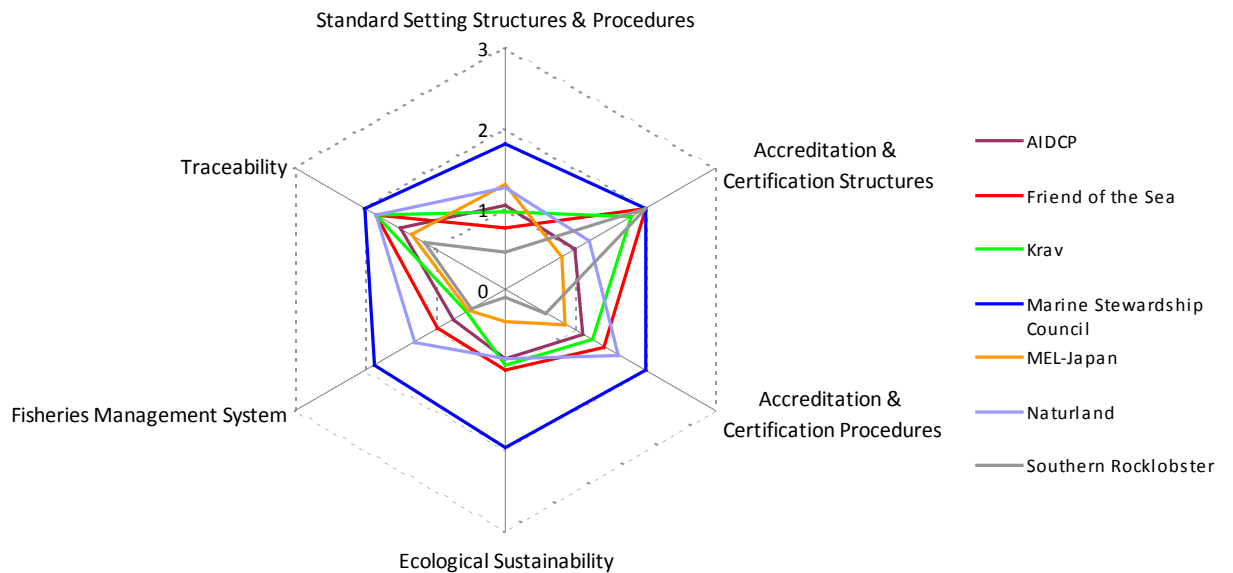
Conclusions

The study revealed that ecolabels and other sustainability programmes use many good initiatives to foster ecologically sustainable fishing and management practices. However, the MSC is the only ecolabel that is structured to have the greatest impact on the sustainability of fisheries and marine ecosystems themselves. (See Graphs and Table).

Other observations include:

- Except for the MSC, ecolabels are not well balanced across all six segments to the extent required to support sustainable fishing. This indicates shortcomings in these other labels, casting doubt on their overall contribution to effective fisheries management and ecological sustainability.
- Most areas of strong compliance tend to be in the segments of Traceability and Accreditation and Certification Structures. However, both of these segments have the least number of assessed criteria.

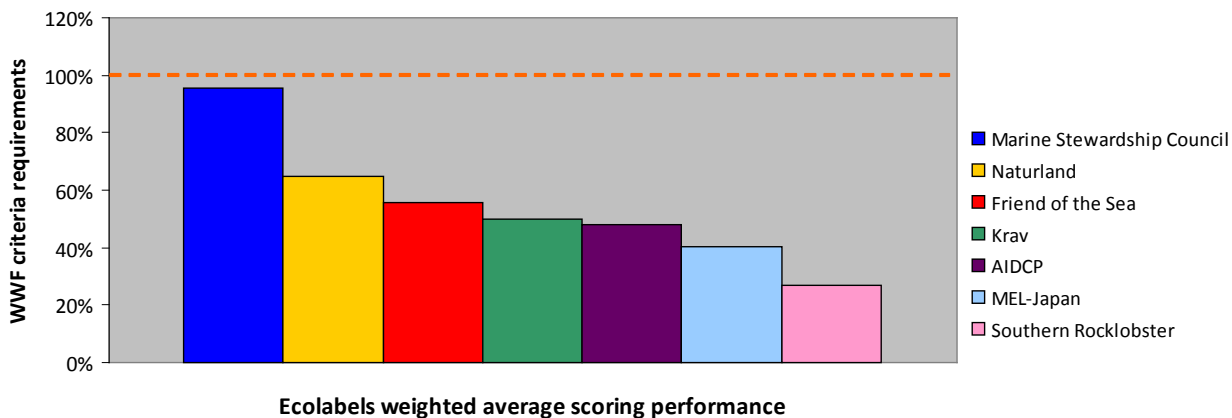
Quantitative Comparison of Ecolabelling Schemes



- The lowest area of performance against the assessment framework is in the topics of Ecological Sustainability and Fisheries Management System, which emphasises the sustainability shortcomings of such ecolabels. While there are some efforts to address the issues of carbon footprint and social and ethical concerns, these have not yet been mainstreamed into existing sustainability programme standards. Animal welfare and economic impacts do not appear to receive even minimal attention. The uptake of such schemes and their depth and effectiveness would also be significantly enhanced if the economics of sustainable fishing could be more explicitly integrated within label standards and criteria.

Rank	Ecolabel name	Weighted average score	Weighted average score in % to Assessment criteria score requirements	Appraisal indicator
1	Marine Stewardship Council	1.91	95.63%	Compliant
2	Naturland	1.29	64.56%	Semi-compliant
3	Friend of the Sea	1.12	55.83%	Semi-compliant
4	Krav	1.00	50.00%	Semi-compliant
5	AIDCP	0.96	48.06%	Non-compliant
6	MEL-Japan	0.81	40.29%	Non-compliant
7	Southern Rocklobster	0.53	26.70%	Non-compliant

Ecolabels completion of WWF criteria



WWF's mission is to stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by:

- conserving the world's biological diversity
- ensuring that the use of renewable natural resources is sustainable
- promoting the reduction of pollution and wasteful consumption.



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