

# The Importance of Sustainably Produced Farmed Shrimp to the North American Market



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**Dr. Megan Bloomer** | The Cheesecake Factory

**Maisie Ganzler** | Bon Appetit Management Company, A division of Compass Group

**Lawnin Crawford** | Chicken of the Sea Frozen Foods, a Thai Union Group Company

# Outline

- Introduction to Seafood Watch and Shrimp in US Market
- Our Partnership Approach to working in India
- Introduction to seafood buyers in the US and their expectations for shrimp
  - The Cheesecake Factory
  - Bon Appetit
  - Chicken of the Sea
- Call for Additional Partnerships



Monterey Bay Aquarium  
**Seafood Watch**



-  Best Choice
-  Good Alternative
-  Avoid

Engaging and empowering consumers and businesses to purchase seafood that is  
fished or farmed in ways that minimize their impact on the environment

# Eco-Certification and Ratings Programs Play Different Roles

## Eco-Certification

- Voluntary
- Continued improvement
- Field audits
- 14% global volume combined
- North Europe
- Traceability/CoC
- Annual audits

## Ratings Programs

- Non-voluntary
- Current performance
- Desktop/some field visits
- 80-85% of US market assessed
- North America
- Inform traceability policy
- Updates as needed or 4 years
- Defer to some eco-certs.

We collaborate with over

**300**

businesses, restaurants  
and industries

Through our network of NGOs  
at the Conservation Alliance,  
our science is used at over

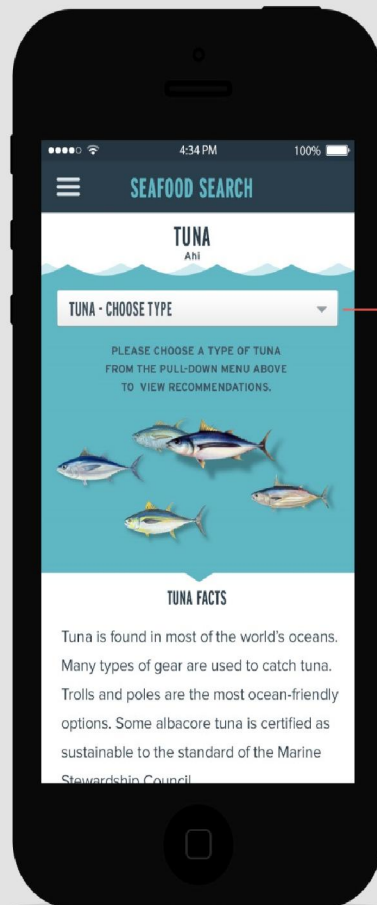
**100,000**

business locations

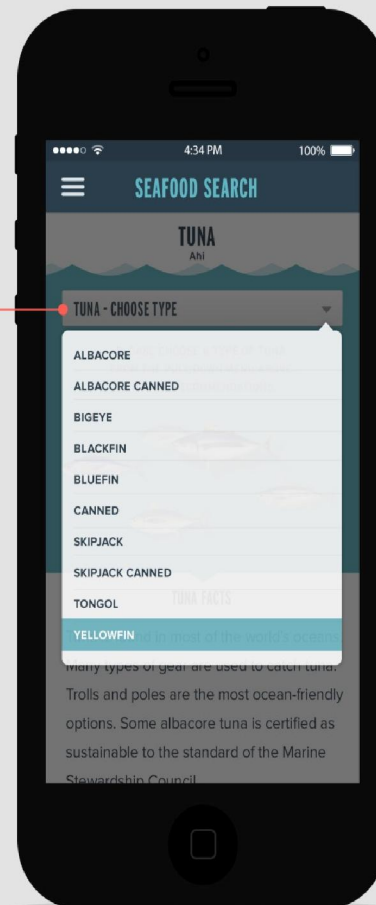


# Goal: Over 10 Million Consumers/Year

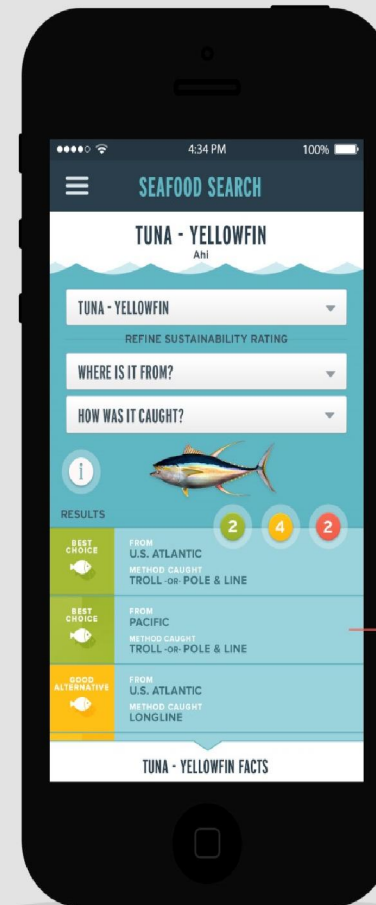
- 90,000 Twitter/Instagram
- Over 4 million on website
- Over 2 million app
- 60 million Pocket Guides
- Thousands of events
- Partner with over 200 Zoos/Aquariums with 150 million visitors
- 2 million visitors to MBA
- Celebrity Chefs



TUNA CATEGORY PAGE



CHOOSE TYPE PULLDOWN



TUNA - YELLOWFIN RESULTS

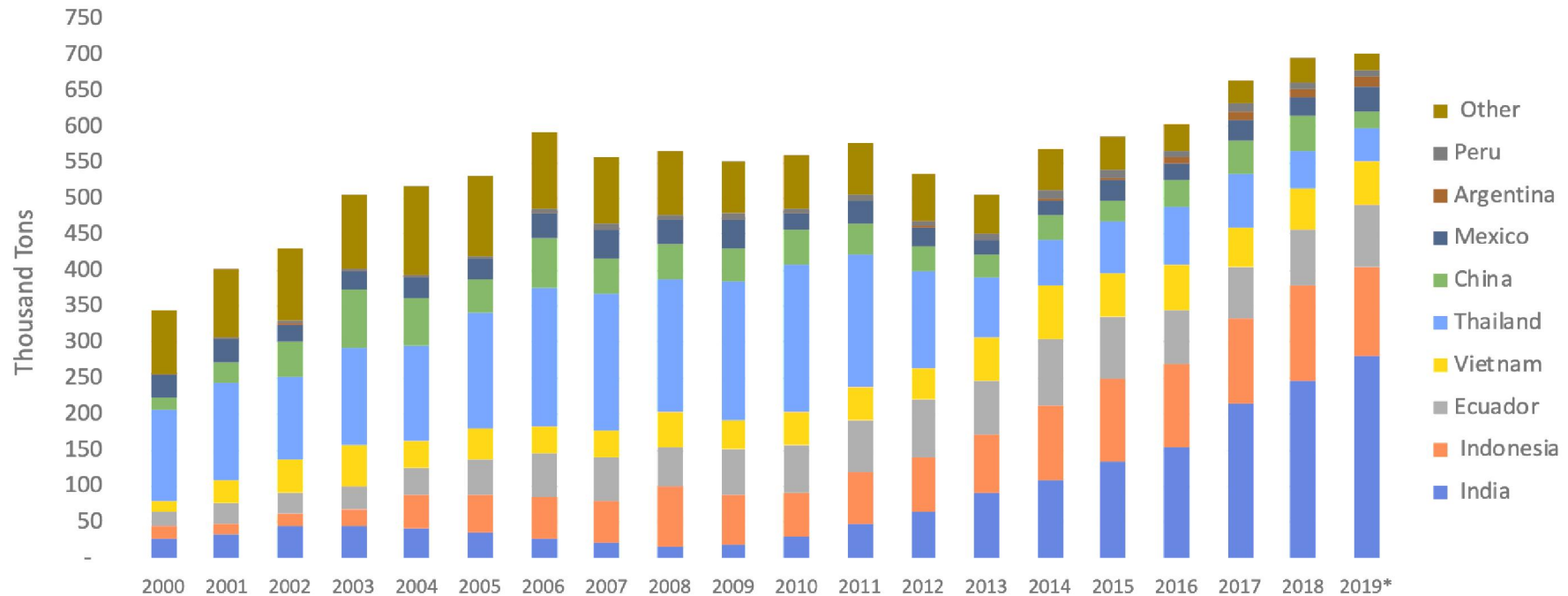
BEST CHOICE	FROM U.S. ATLANTIC METHOD CAUGHT TROLL OR POLE & LINE
BEST CHOICE	FROM PACIFIC METHOD CAUGHT TROLL OR POLE & LINE
GOOD ALTERNATIVE	FROM U.S. ATLANTIC METHOD CAUGHT LONGLINE
GOOD ALTERNATIVE	FROM HAWAII METHOD CAUGHT LONGLINE
GOOD ALTERNATIVE	FROM WORLDWIDE - EXCEPT U.S. ATLANTIC & PACIFIC METHOD CAUGHT TROLL OR POLE & LINE
GOOD ALTERNATIVE CERTIFIED	FROM MARINE STEWARDSHIP COUNCIL CERTIFIED METHOD CAUGHT WILD CAUGHT
NOT SUSTAINABLE	FROM WORLDWIDE - EXCEPT U.S. ATLANTIC & HAWAII METHOD CAUGHT LONGLINE
NOT SUSTAINABLE	FROM WORLDWIDE METHOD CAUGHT PURSE SEINE

TUNA - YELLOWFIN RESULTS

# US SHRIMP MARKET

## U.S. Shrimp Imports

Down 12% between 2011-13, Up 39% between 2013-19



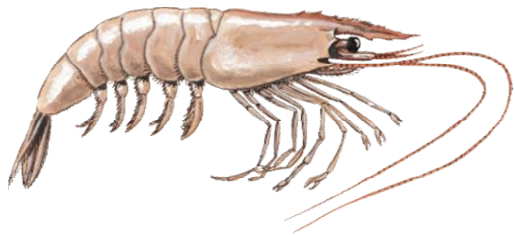
Imports from Thailand declined sharply (by 79%) between 2010 and 2019.

India and Indonesia have become the top exporters to the U.S. market, accounting for 58% of imports in 2019.

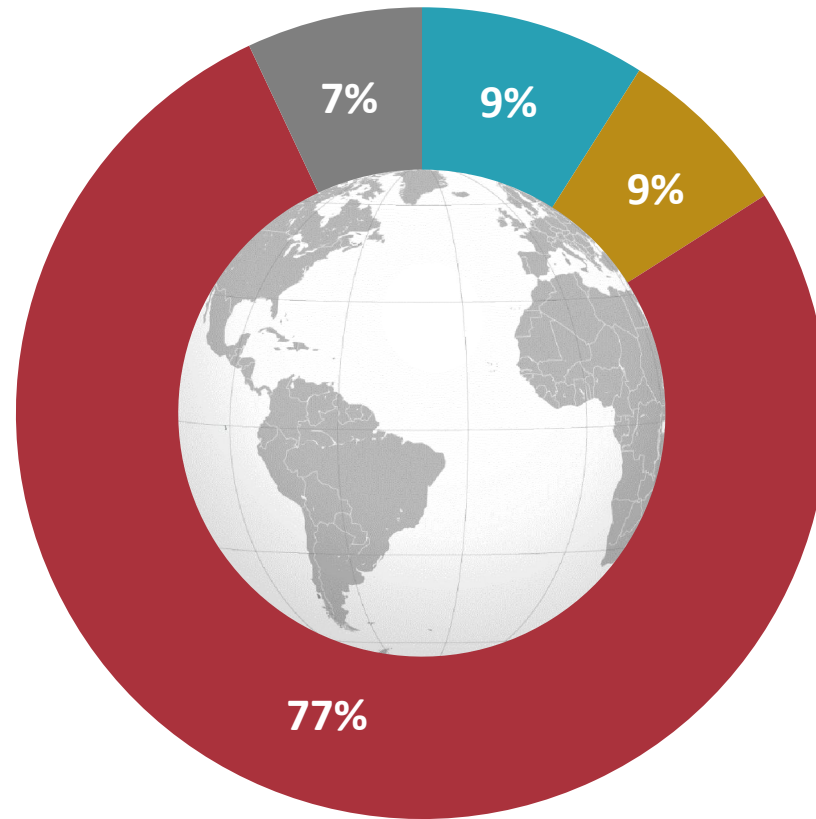
India's exports have increased at a CAGR of 30% between 2008 and 2019.

Source: USDC/NMFS (2019)

\* Estimate

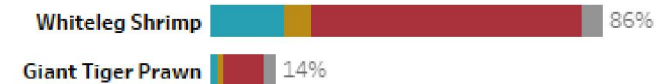


## Environmental Performance of Global Farmed Whiteleg Shrimp & Giant Tiger Prawn

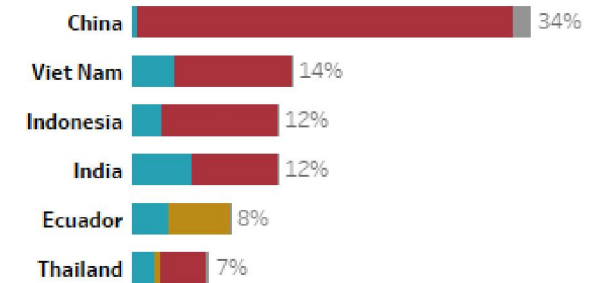


Total production  
**5,192,733 mt**

### Top produced species

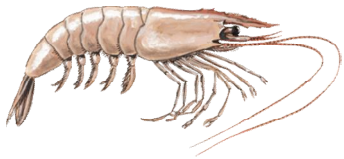


### Top producing countries



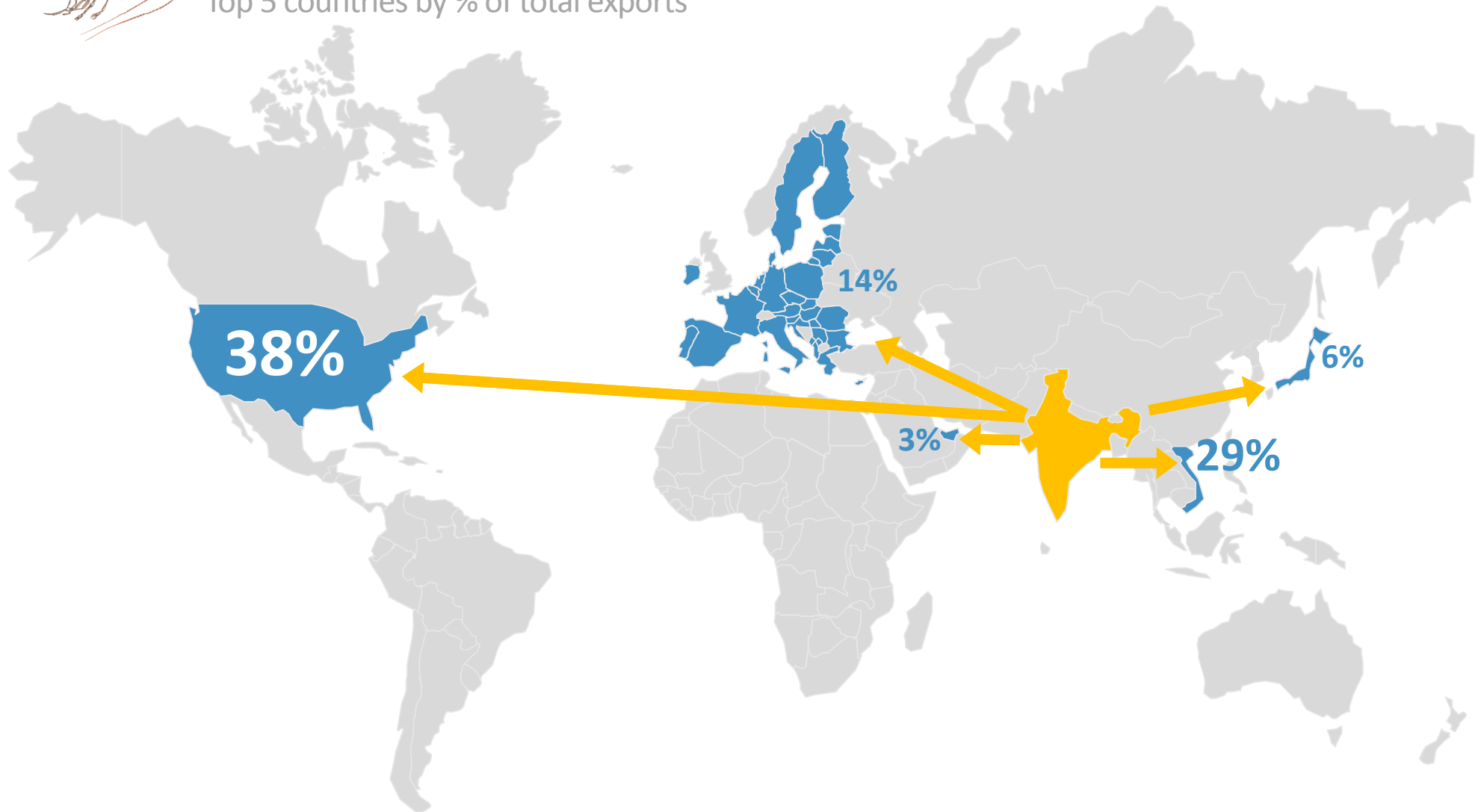
■ Best Choice 
 ■ Certified 
 ■ Good Alternative 
 ■ Avoid 
 ■ Assessment In Progress 
 ■ Not Yet Assessed

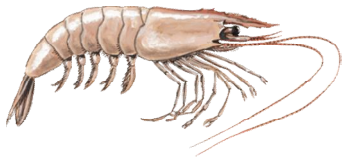




# India Exports of Shrimp & Prawn

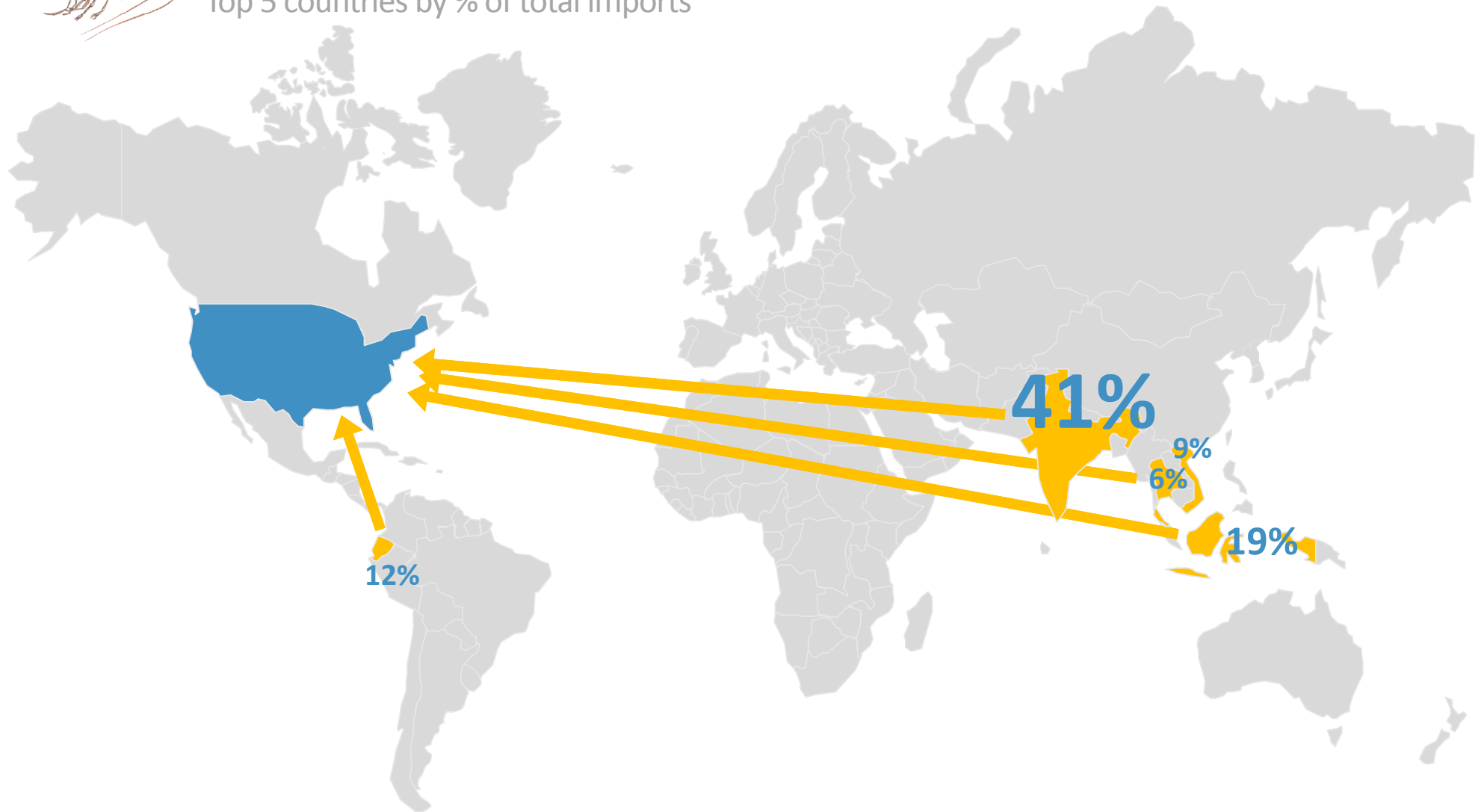
Top 5 countries by % of total exports

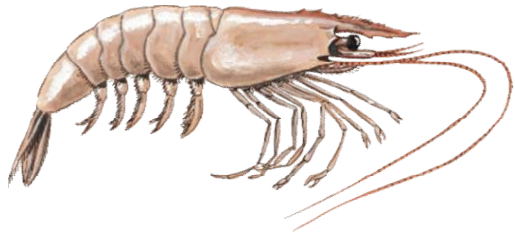




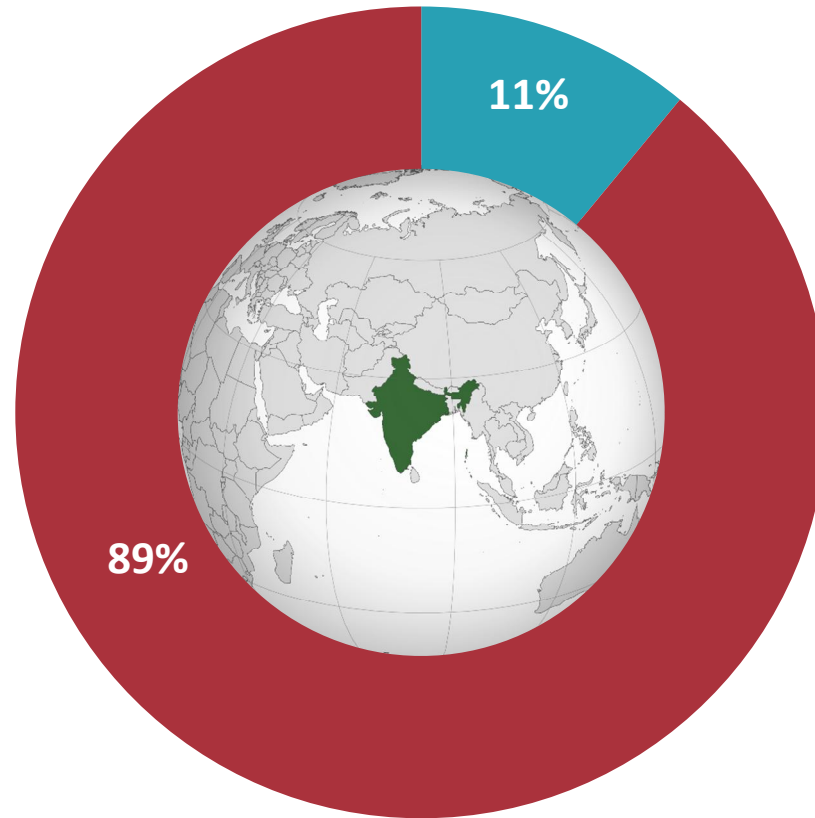
# U.S. Imports of Shrimp & Prawn

Top 5 countries by % of total imports





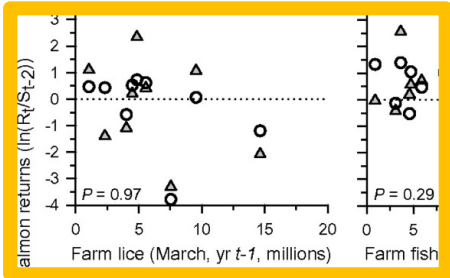
## Environmental Performance of India Farmed Whiteleg Shrimp & Giant Tiger Prawn



 Certified  Avoid

Total production  
**641,850 mt**

# Aquaculture Standard



**Criterion 1**  
Data



**Criterion 2**  
Effluent



**Criterion 3**  
Habitat



**Criterion 4**  
Chemical Use



**Criterion 5**  
Feed



**Criterion 6**  
Escapes



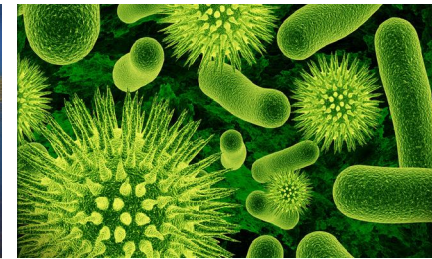
**Criterion 7**  
Disease



**Criterion 8X**  
Source of Stock

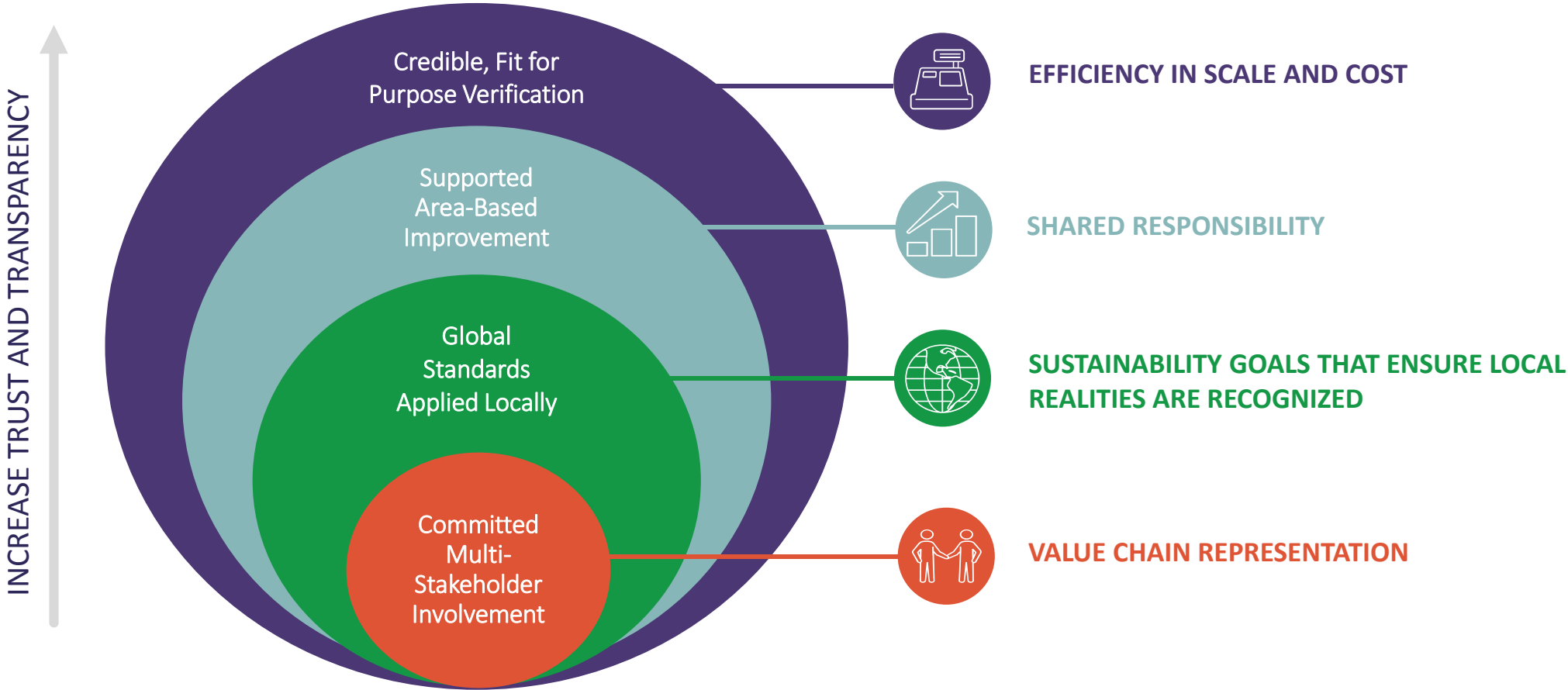


**Criterion 9X**  
Wildlife Mortalities



**Criterion 10X**  
Introductions

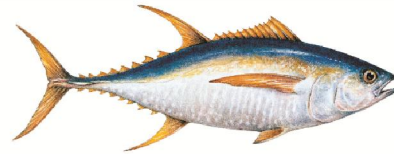
# THE PARTNERSHIP ASSURANCE MODEL



# The Partnership Assurance Model: Farmed Shrimp, India



Monterey Bay Aquarium  
**Seafood Watch**



# The Partnership Assurance Model: Farmed Shrimp, India



Tucker Consulting Services, LLC

# The Partnership Assurance Model: Farmed Shrimp, India

## Scope

Country: India

State: Andhra Pradesh

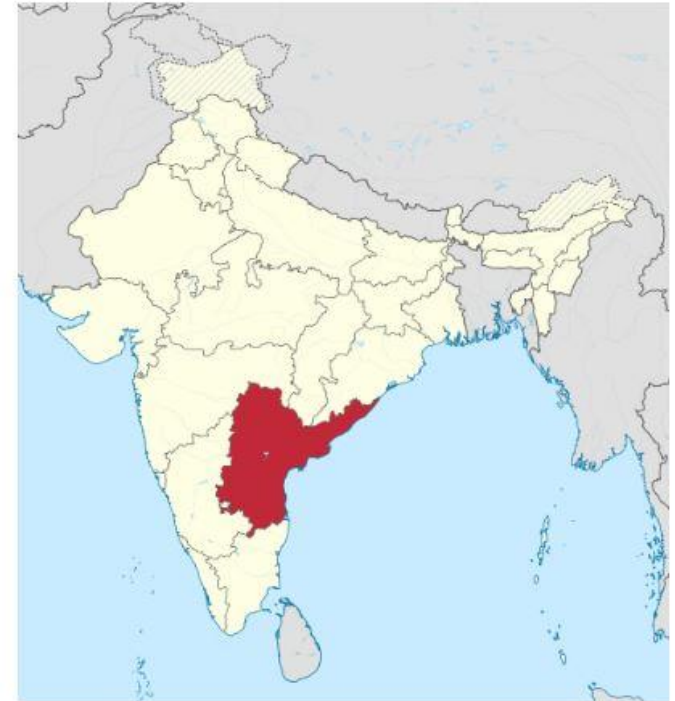
Species: Whiteleg shrimp (*Litopenaeus vannamei*)

Production method: Small-scale farms, Semi-intensive pond production

Volume: Approximately 375,000 mt annual production

## Goal

**By 2025**, all whiteleg shrimp production in Andhra Pradesh will achieve a level of environmental performance equivalent to a **Seafood Watch Yellow, Good Alternative rating or equivalent (BAP 2-4 star or ASC certification)**.

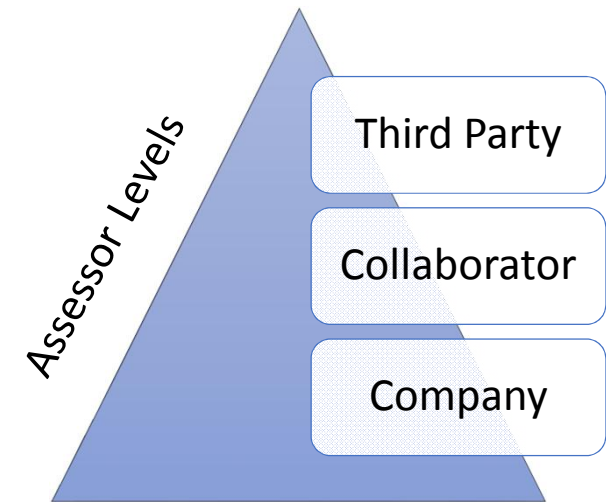




# Seafood Watch Improvement Verification Platform (IVP)

## The IVP is:

- A compilation of interactive questions that assess for compliance against the Seafood Watch sustainability bars of Yellow and Green
- A web-based platform available for use on- and offline
- A farm-level assessment tool with built-in, rolled-up assessment of Group compliance; full compliance at each Assessor level signals readiness for next level assessments
- Capable of identifying and categorizing areas for improvement
- Workable in English and Vietnamese (additional languages forthcoming)



### Current Verification Criteria

- ✓ All farms must pass Group Goal for assurance level to progress
- ✓ If Areas for Improvement are identified, farms in the Group must be revisited after improvement



# Monterey Bay Aquarium Seafood Watch®

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Screen for an Assessor conduct a Site assessment; shown here, the section on shrimp health management in the shrimp farm standard

Monterey Bay Aquarium  
Seafood Watch

Home + Lock Settings Refresh Checkmark User Profile Flag

**2.4 USE OF ANTIBIOTICS** (1/1) ✓

Have antibiotics been used during the current or most recent production cycle? **NO** YES

**2.5 USE OF VETERINARY DRUGS AND CHEMICALS** (0/3) -

Have any other therapeutic chemicals been used during the current or most recent production cycle? ⓘ NO YES

Is there evidence that drugs/chemicals banned by the country of production are in use? NO YES

Have any pond preparation products been used during the current or most recent production cycle? ⓘ NO YES

**2.6 USE OF PROBIOTICS AND OTHER BIOREMEDIATION AGENTS** (0/1) -

Are probiotics or other bioremediation agents used? NO YES

**2.7 IMPLEMENTATION OF BASIC BIOSECURITY PROTOCOLS** (0/1) -

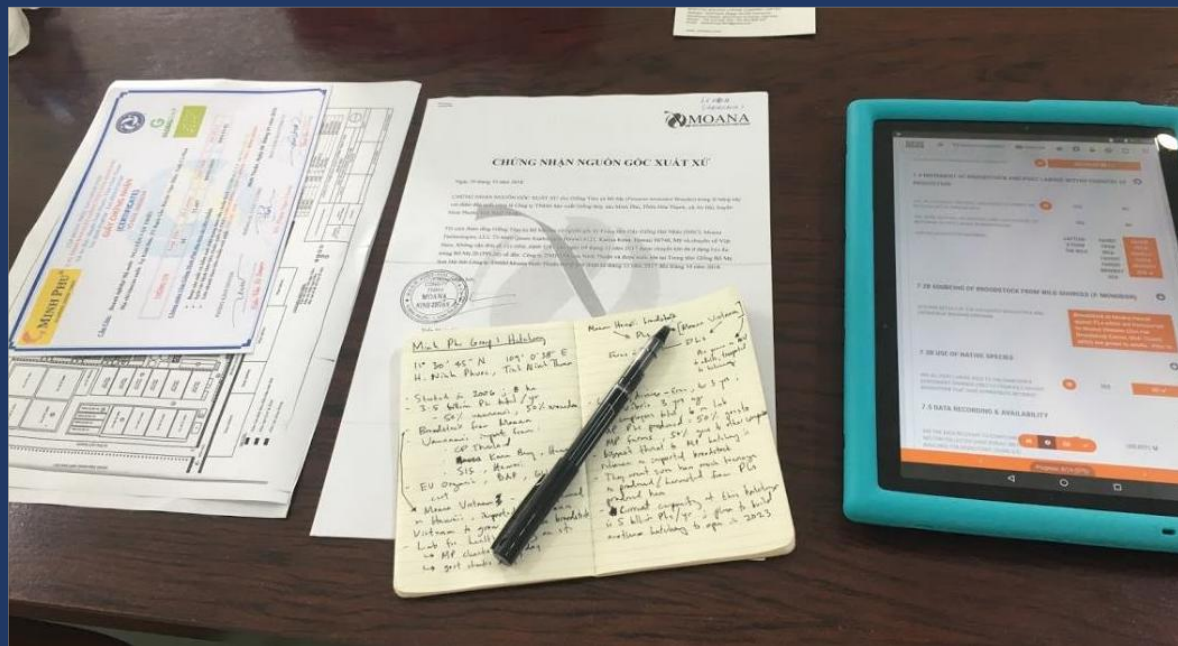
Is there a written health management plan in place? YES NO

**2.8 DATA RECORDING AND AVAILABILITY** (0/1) -

Are the data relevant to compliance criteria in this section collected using robust methods and available for inspection? (Score 0-5) ⓘ (SELECT) 📄

🔍 ⚙️ ❌

< BACK Progress: 13/101 (13%) NEXT >



# U.S. BUYER EXPECTATIONS

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*Legality,  
Transparency  
and  
Traceability*

*Protect human  
rights, dignity, and  
improve livelihoods*

*Seafood Watch  
Yellow/Green or  
equivalent (BAP  
2-4 Star, ASC)*

*High quality  
products*

*Communication  
and product  
story*

The seafood buyers in this collaboration represent some of the top food service and retail companies in the United States and have made seafood sourcing commitments, requiring environmentally sustainable seafood, guided by Seafood Watch.



- Bon Appetit Management Company - \$1.5 billion US-based food service company (Compass Group, North America - \$18.6 billion)
- Committed to Seafood Watch green or yellow for almost 20 years.
- Bon Appetit buys over 400,000 lbs of BAP 2 star shrimp/year.
  - 276 farms in Thailand
  - 273 farms in India
  - 64 farms in Vietnam
  - 32 farms in Indonesia
- We want all farmers to have market access, to be using environmentally-sound practices, and not be contributing to public health problems.



SeaChange<sup>®</sup> is Thai Union's global sustainability strategy. Our commitment to improving the seafood industry includes a commitment to driving environmental and social sustainability in farms, fisheries, and our supply chains.

We expect that our suppliers of farmed seafood around the world will meet Monterey Bay Aquarium Seafood Watch recommended ratings or achieve certification by 2025.

Since India is such an important sourcing region for our business, we pledge our support to working with Monterey Bay Aquarium, and our partners in India, to make it possible for farms to reach these high standards.



## GOAL

By 2025, source environmentally and socially responsible seafood and reduce antibiotic usage per Monterey Bay – Seafood Watch guidelines.

## OUR PARTNERSHIP OBJECTIVES



Source yellow or better shrimp, as determined by Monterey Bay – Seafood Watch.



Provide stable and growing supply through improved production, registered farms, and effective disease management.



Improve the economic, environmental, and social performance of both large and small scale producers.





Let us know  
if you are  
interested in  
joining this  
partnership.

Come talk to  
us over the  
next few  
days.