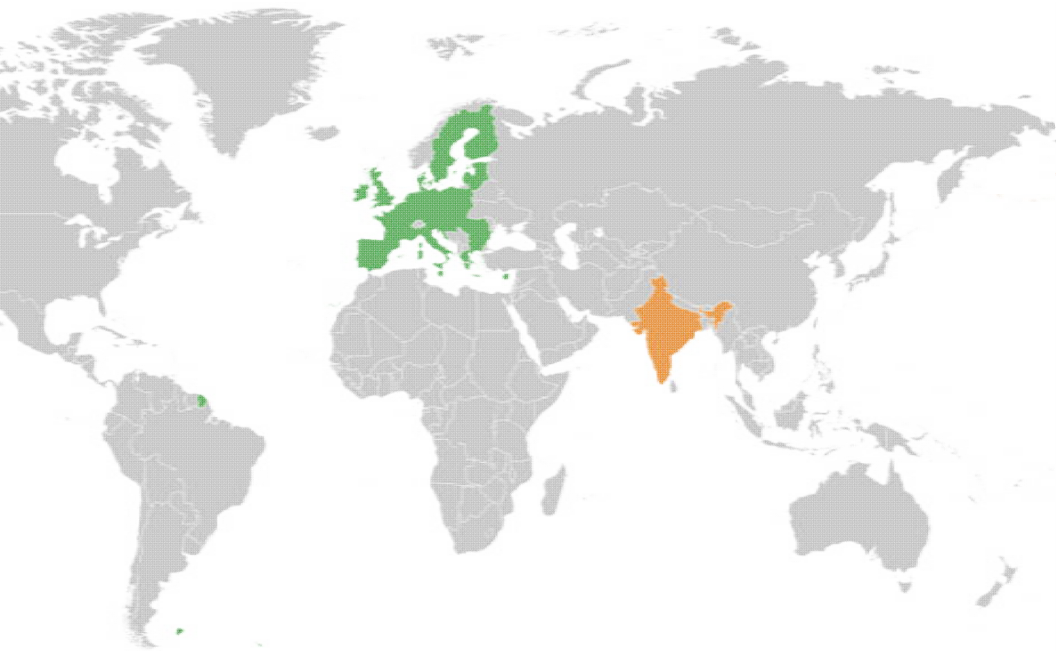


European market for sustainable seafood and retailers perspective

Technical Session

India International Seafood Show

by Udo Censkowsky, Director of bluesensus, Germany



at a glance

Total seafood supply (own production & import): 14.61 million tons

Total trade volume with seafood in 2018: 32,28 billion EUR

40.3 % self sufficiency (remains low)

24.35 kg average fish consumption per consumer over all EU countries

Per capita household expenditure: 115 EUR (+ 2,7% from 2017 to 2018)

Different consumption patterns in EU countries

- product preferences (e.g. crustacean, cephalopods)
- capture fisheries (wild) versus farmed seafood
- frozen (in consumer boxes) versus fresh (unfrozen)

Different sales channels (retail, foodservice)

Seafood exports India → EU: around 0.84 billion EUR (2018)

is Sustainable Seafood ?



Global production volume (2019)

(starting 1996): **1 million tons** of certified seafood products
(12 million tons certified catch; **no fishery in India**)



(starting 2010): **1.9 million tons** of farmed fish, crustacean and shellfish
(thereof **227,809 tons of shrimp, approx. 4% India**)



(starting 1996): **100,000 tons** of certified fish, crustacean and shellfish
(thereof 39,500 tons for salmon)



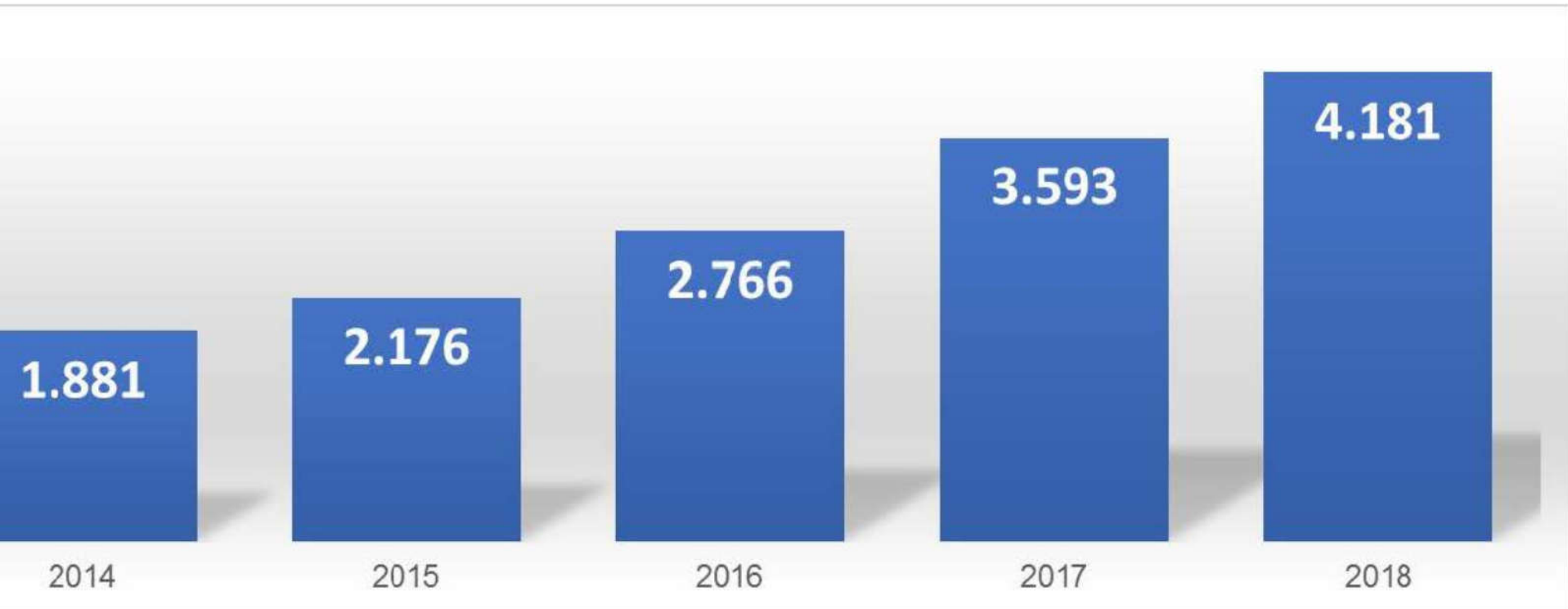
1 certified organic Black Tiger project in India

539,687 tons of fish, crustacean and shellfish in China



ch Sustainable Seafood Market

ue growth of sustainable seafood products (exclusive ALDI/LIDL)



zmet in miljoenen euro's binnen Nederlandse Supermarkten (exclusief Aldi Lidl) van duurzamere producten met een keurmerk..

www.iriworldwide.com/nl-NL/Insights/news/Omzet-duurzamere-voeding-met-keurmerk-verdubbeld-in-vier-jaar

Organic Retail Brands

DACH – Markets: Organic Trade Marks				Other EU countries			
Region	Country	Trade mark	Organic shrimp	Retailer	Country	Trade mark	Organic shrimp
DACH	Germany			Carrefour	France		
	Germany			Intermarche	France		
	Germany			Tesco	UK		
RD	Germany			Sainsbury	UK		
G	Austria			Delhaize	Belgium		
	Switzerland			Auchan	France		

etailers Seafood Procurement Policies

elements of “sustainable seafood procurement policies”

certification required on production level:

ASC, EU-Organic, GlobalGAP, BAP, Fishery Improvement Projects (FIP's)

certification required on processing level:

SMETA, ASC/MSC CoC

capture fisheries:

exclusion of critically endangered species (e.g. eel, sharks)

aquaculture

exclusion of GMO Feed, use of fish meal, ban or strict handling of antibiotics, social conditions, protection of biodiversity





ALDI SÜD Germany

Wild-caught fish

By the end of 2017, all raw materials used for the fish and seafood products offered within our range of fresh/frozen core and seasonal items will become MSC (Marine Stewardship Council) certified.

Fish from aquacultures

By the end of 2017, the raw materials used for the fish and seafood products included in our ranges of core and seasonal fresh, chilled, frozen, and canned items will become certified by either ASC (Aquaculture Stewardship Council), Organic, or GLOBALG.A.P.

METRO

METRO Cash & Carry has identified its twelve major fish and seafood species. 80% of these species will be certified by 2020 according to one of the following certification standards:

- ASC (Aquaculture Stewardship Council)
- European Organic Certification
- FOS (Friend of the Sea)
- GAA – BAP (Global Aquaculture Alliance – Best Aquaculture Practices)
- GLOBALG.A.P.
- MSC (Marine Stewardship Council)

or according to another certification standard that has been recognised by the Global Sustainable Seafood Initiative (GSSI).



Asda

Founded in the 1960s in Yorkshire, Asda is one of Britain's leading retailers and helps customers save money and live better in stores, online and through their mobile devices. With 639 stores, Asda is a major seafood retailer selling fresh, frozen and chilled seafood. Its head office is in Leeds, Yorkshire and it joined Walmart, the world's number one retailer, in 1999.

2019

Number of wild caught species used	% volume from certified fisheries	% volume from a FIP	Number of farmed species used	% volume from certified farms
41	90	3	12	89

Your guide to sustainable fish!

Search by fish name or species

All



WHAT WE DO

The VISwijzer assesses fish, shellfish, which are for sale in the Netherlands for sustainability.

Ranking



Le guide du WWF sur
les produits de la mer

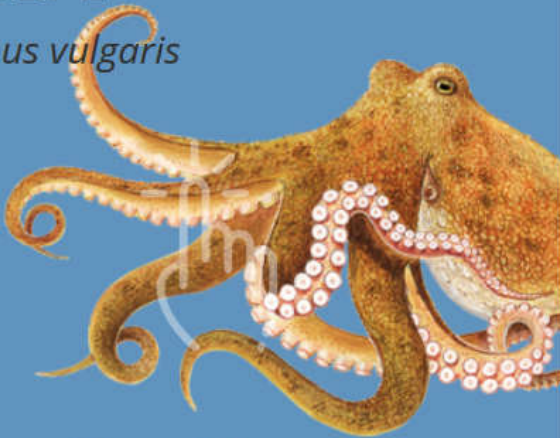
HISTOIRE DE POISSONS

RECETTES

RECOMMANDATIONS WWF

POULPE

Octopus vulgaris



SARDINE

Sardina pilchardus



SAUMON D'ALASKA

Oncorhynchus keta, *O. kisutch*, *O. tshawytscha*, *O. nerka*, *O. gorbuscha*





Good Fish Guide

Your guide to sustainable seafood

Search

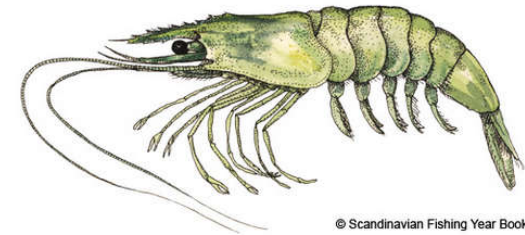
Prawn, King (whiteleg), prawns

Litopenaeus vannamei

Method of production — Farmed

Production country — India, Vietnam and Indonesia

Production method — Pond system, Intensive & Semi-intensive



© Scandinavian Fishing Year Book

Sustainability rating 1 2 3 4 5

info

Overview

Feed

Environmental Impacts

Fish Welfare

Management

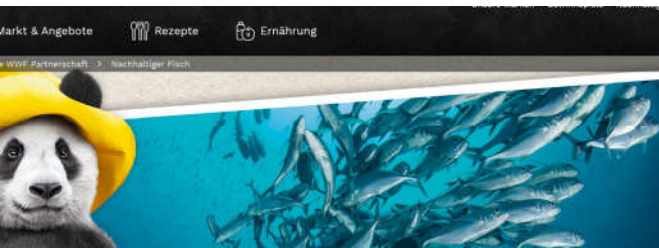
Production Method

Alternatives

Biology

Operations Retailers and NGO's

many: WWF Germany evaluates all seafood products sold by EDEKA retail chain.



Carrefour Brazil:

Group Our activities Our commitments Recruitment and careers Finance Foundation

News / Carrefour and Seafood Watch enter into an unprecedented partnership

GROUP

> Current news

> Presentation

07/31/2018

BRAZIL

Carrefour and Seafood Watch enter into an unprecedented partnership

ALDI SÜD USA:



HOME PROGRAMS ABOUT US PUBLICATIONS NEWS BLOG SUPPORT US

ALDI USA Inc. and SFP Announce Plans To Work Together on Seafood Sustainability Issues

Home / News / ALDI USA Inc. and SFP Announce Plans To Work Together on Seafood Sustainability Issues



Operations Retailers and Supply Chains

Examples from India: Engagement of ALDI SÜD Group



Development of Organic Black Tiger Supply Chain in West Bengal supported by Hofer KG



Blue Sea Aquaculture

Private Limited



Operations Retailers and Supply Chains

Examples from India: Engagement of ALDI SÜD Germany



Implementation of Palk Bay Flower Shrimp Trawl Fishery Improvement Project (FIP) in Tamil Nadu



GOVERNMENT OF TAMILNADU
DEPARTMENT OF FISHERIES

Challenges

Product recalls due to antibiotic residues in ASC certified shrimp.



Increasing number of NGO's request MSC to rise the bar for certification.



Wholesalers still compete over prices which includes also sustainable seafood products (not only in Germany).

Global changes in aquaculture and capture fisheries practises require not only higher prices but also a fair benefit sharing up to the fishermen and/or the fish owners.

Circulation Aquaculture Systems will become the future of intensive aquaculture (starting with salmon).

Organic aquaculture for traditional, low-input and socially embedded aquaculture. Huge potential in India

Carbon smart aqua-farming/ wild fisheries: in future carbon footprint along the supply chain will matter in the European market.

Increasing development of the domestic market in India will have an increasing impact on the export business.



Thank you!

bluesensus
sustainability & seafood consulting