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Farmed fish diets wiping out wild fish stocks in Asia and Africa

Ahead of World Food Dayⁱ, new report reveals links between world's biggest supermarkets and illegal, unsustainable fishing in India, Vietnam and The Gambia

- New investigative report reveals fishmeal and fish oil (FMFO) industry is using fishing practices that are stripping the oceans bare and damaging marine ecosystems to feed the booming aquaculture industry.
- Farmed seafood bought by global consumers linked to extractive FMFO supply chains.
- Aquafeed companies, aquaculture producers, seafood processors and major retailers complicit by association.
- Report shows retailers being misled by flawed trade body IFFO, which certifies FMFO and aquafeed companies linked to unsustainable and illegal fishing practices.
- Report calls for an end to the use of wild-caught fish as feed and a rapid switch to more sustainable alternatives.

A new report by the Dutch-based Changing Markets Foundation has found links between some of the world's top supermarkets and illegal, unsustainable fishing operations in India, Vietnam and The Gambia which supply feed ingredients for farmed seafood products in high-income markets.

The report, *Fishing for Catastrophe*, is the first to comprehensively map fishmeal and fish oil (FMFO) supply chains from fishery to fork.

It finds that the surge in popularity of fish (such as salmon and prawns) in the Western diet is causing fish stocks to collapse and taking a key source of protein away from some of the world's poorest communities, due to the aquaculture industry's reliance on FMFO for fish feed.

Many farmed-fish products are labelled as certified sustainable despite the damaging impact of the FMFO industry on marine ecosystems.

The investigation also finds that while retailers take assurances from FMFO trade body IFFO about supply chain sustainability at face value, dozens of IFFO members and certified companies are linked to unsustainable and illegal fishing practices.

Natasha Hurley from Changing Markets, said: "Shoppers across the globe are totally unaware that the seafood they are buying has a dark secret. The boom in aquaculture, to match the global demand for premium seafood products such as salmon, is fuelling illegal and unsustainable fishing practices which are stripping the oceans bare.

"Climate change is already destabilising our food system and that's being exacerbated by the FMFO industry, which will take anything and everything out of the ocean to meet demand from the growing aquaculture industry.

“These practices are not only destroying vulnerable marine ecosystems, but are also causing huge social issues, as communities that have been reliant on the ocean for food for generations are having their livelihoods destroyed and their access to a vital source of protein undermined.”

Hugh Fearnley-Whittingstall, British celebrity chef, said: “I saw for myself while making my Fish Fight programmes that fishmeal for the aquaculture industry – producing supermarket favourites like prawns and salmon – is being sourced in a way that is devastating to the marine environment, and to the wild fish stocks that make up much of the feed.

“It’s increasingly clear that even products certified as sustainably produced are based on aquaculture that is sourcing fishmeal in deeply irresponsible ways. The bottom line is that we need to stop taking wild fish out of the ocean to feed farmed fish, before it’s too late.”

The report highlights that the certification standard for the FMFO industry (IFFO RS) is a sustainability smokescreen, with IFFO simultaneously functioning as the FMFO industry trade association, representing the interests of the sector by promoting the use of FMFO and lobbying to defend the industry.

Natasha Hurley continued: “IFFO is wholly unfit to serve as a certification body because it was set up to defend the interests of the industry it is meant to oversee. This is a clear conflict of interest.”

Demand for fish is growing more rapidly than the human population, and is outpacing demand for meat.¹ Aquaculture currently accounts for roughly half of world fish consumption,ⁱⁱ and is projected to rapidly grow even further; farmed species are expected to account for 60% of global fish consumption by 2030.² Changing Markets have raised concerns about the long-term impact that the sector’s reliance on FMFO could have:

“The economics of the FMFO industry are broken. If aquafeed companies do not move faster to source genuinely sustainable alternatives they will face serious economic and reputational consequences that could substantially alter the predicted growth for the industry and those reliant on it”, said Natasha Hurley.

“The question is: what comes first – the collapse of natural ecosystems or the collapse of the economic sector that is responsible for the problem?”

Anja Bakken Riise, leader of environmental group Future in our Hands, a Norwegian organisation committed to safeguarding the environment for future generations and a globally fair distribution of wealth, said: “The aquaculture industry needs to move away from its reliance on fishmeal and fish oil, an industry which is jeopardising local food security, livelihoods, health and the environment as it stands today.

¹ FAO estimates that, since 1961, the 3.2% average annual increase in global fish consumption has outpaced population growth (1.6%) and exceeded increases in consumption of meat from all terrestrial animals, both combined (2.8%) and individually, except poultry (4.9%). See: FAO (2018) *The state of world fisheries and aquaculture, 2018: Meeting the sustainable development goals*. Licence: CC BY-NC-SA 3.0 IGO. Rome: FAO.

² FAO projections show that combined world capture fisheries and aquaculture production will reach 200 MT (LWE) by 2030, up from just under 100 MT in 1990. Capture production will remain roughly stable (with a slight downward trend) up to 2030, with aquaculture production accounting for most of the growth. See: FAO (2018) *The state of world fisheries and aquaculture, 2018*.

“The transition to alternative feed resources is imperative to secure a sustainable future where the aquaculture industry is part of the solution and not the problem.”

Fishing for Catastrophe

The report, *Fishing for Catastrophe*, found that FMFO production is accelerating the decline of fish stocks and diverting fish from human consumption in India, Vietnam and The Gambia.

Changing Markets’ investigations took place between May and July 2019 in three global FMFO hubs and found:

In The Gambia, Africa’s smallest nation and one of its poorest, citizens are particularly reliant on the ocean for food, consuming 25kg of fish per capita compared to the African average of 8.2kg.³ The nation’s food insecurity rate has risen from 5% to 8% over the past five years⁴, in part due to fluctuating populations of bonga fish as a result of FMFO fishing.

Changing Markets’ findings show that:

- FMFO destined for human consumption has been exported with falsified food safety certificates.
- The fish catch of just one of the Gambia’s three FMFO plants accounted for approximately 40% of the country’s total reported catches in 2016, revealing the massive scale of this new industry in the country.
- Pollution from FMFO production is destroying The Gambia’s budding eco-tourism industry.
- At least one Gambian plant sells most of its fishmeal to Vietnam which is then relabelled on the black market for re-export to China, the world’s largest aquafeed producer, circumventing the absence of a fishmeal export agreement between the two countries.

In Vietnam, one of the world’s largest fishmeal producers, where there are widespread fears that the EU will ban (‘red card’) Vietnamese seafood imports due to the continued prevalence of illegal, unregulated and unreported (IUU) fishing:

- Significant under-reporting of catches is enabling overfishing to continue unchecked. Catches destined for FMFO factories are not being reported to authorities.
- Lack of fish is leading to widespread fishing in foreign waters, which stokes regional tensions.
- Fish stocks are in decline. For example, fishermen in Vung Tau Province reported their lowest catches ever in 2018, due to overfishing for FMFO.
- Highly unsustainable fishing techniques are being used and fishing is indiscriminate, targeting species not traditionally used for FMFO.
- Pollution from FMFO production is blighting people’s lives.

³ UN Food and Agriculture Organisation (2007) Republic of Gambia Fishery Profile. [ONLINE] Available at: http://www.fao.org/fishery/docs/DOCUMENT/fcp/en/FI_CP_GM.pdf

⁴ UN World Food Programme (2018) The Gambia country brief, September 2018. [ONLINE] Available at: https://docs.wfp.org/api/documents/WFP-0000101157/download/?_ga=2.179227492.1782577258.1559719392-2011303021.1559719392

A trawler captain at one port told the Changing Markets investigators he caught around 40-50 tons of 'trash fish' in Vietnamese waters on his last trip – in the past he would have been able to catch double this amount.

He said: *“In general, (I catch) whatever the trawler can catch. Big or small, (I) catch all, not skipping any fish... Even as small as the toothpick. If they come in the net, we catch all.*

“If we don't go fishing, we are hungry. We go fishing all year around, so the resource is exhausted.”

In India:

- The sudden monetisation of 'trash fish' brought about by the FMFO industry has resulted in the proliferation of 'non-fishermen' looking for short term returns.
- Fish stocks of species traditionally used for FMFO have collapsed.
- The FMFO industry is indiscriminate: juvenile fish, species traditionally destined for human consumption and reef fish are all being used to produce FMFO.
- FMFO plants generally by-pass traditional auctions and secure a fishing vessel's entire catch with upfront payment.
- Powerless to reject the industry's advances, fisherpeople are using more damaging methods of fishing and poor preservation (spoiling edible fish) and selling to plants rather than at auction.
- Local communities are affected by air and water pollution from FMFO production.

A representative of a Mangalore-based fishermen's association revealed that people will continue to fish until the stocks have completely collapsed:

“Fishermen have ethics. They used to get dolphins, sharks and turtles in their nets but would release them. These non-fishermen are getting everything, and seeing them, even the fishermen are getting into such behaviour”, he said.

“... we are not getting any catch generally, so when we get a catch – small or big fish, we go for it. It is a matter of survival; whatever fish we get we catch it.

“This is the last generation in fisheries.”

Recommendations from Changing Markets

Changing Markets has offered the following series of recommendations to 'protect finite and rapidly dwindling global fish stocks':

Aquafeed industry

- Stop using wild-caught fish and switch to more sustainable alternatives – the use of FMFO from whole wild fish must be phased out across the entire industry for transformational change to take place.
- Ensure that alternative feed sources do not give rise to other ecological problems.

Aquaculture industry (fish farms)

- Prioritise cultivating species that require no feed (e.g. shellfish) less feed (e.g. tilapia), or that can be fed an entirely vegetarian diet (e.g. carp).

- For species that require feed, push aquafeed producers to provide genuinely sustainable alternatives to aquafeed containing FMFO.

Certification schemes

- Remove certification of reduction fisheries, fish that is not used for direct human consumption, and farmed fish reliant on the use of FMFO from whole wild-caught fish for feed.

Policymakers

- Implement stricter regulations on due diligence and transparency in aquafeed supply chains to eliminate IUU and slave labour and prevent overfishing.
- Governments should support the phase-out of whole wild-caught fish for aquafeed and fish farming.
- Develop guidelines for sustainable feed ingredients. Policy should support the development of alternative feed industries and provide incentives for a transition to more sustainable ingredients.

Retailers

- Provide full transparency about the supply chain of farmed fish.
- Commit to avoiding seafood cultivated using FMFO from whole wild-caught fish and conduct regular audits to ensure this is being implemented.

Consumers

- Diversify consumption of seafood to include fewer species reliant on feed – especially carnivorous farmed species, such as salmon and prawns.

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Media contacts

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About Changing Markets Foundation

The Changing Markets Foundation partners with NGOs on market-focused campaigns. Its mission is to expose irresponsible corporate practices and drive change towards a more sustainable economy.

www.changingmarkets.org / @ChangingMarkets

Campaign site: www.fishingthefeed.com

About the investigation

The report was compiled following field trips to all three countries between May and July 2019. The objective of the trips was to show the working of the FMFO supply chain, from sea to factory to export.

This was done by documenting environmental, economic and social impacts, conducting informant interviews, and gathering visual evidence where possible. During the initial research phase, Changing Markets gathered secondary evidence on violations of government regulations and pollution at these sites through an in-depth review of media reports and government announcements.

The supply chain analysis followed both direct and indirect FMFO flows to high-income markets.

ⁱ FAO, World Food Day, <http://www.fao.org/world-food-day>

ⁱⁱ FAO (2018) *The state of world fisheries and aquaculture, 2018: Meeting the sustainable development goals*.
<http://www.fao.org/3/i9540en/i9540en.pdf>