



**GLOBAL SUSTAINABLE  
SEAFOOD INITIATIVE**

**Celebrating 10 Years**

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# Executive Director

Born and raised in Alaska. B.A. in Economics - University of Alaska Fairbanks

Was an exchange student in Japan

Traveled for years helping Japanese companies comply with export requirements to the U.S. doing consulting and HACCP audits for scallop, salmon and yellowtail plants and farms

Served on the GSSI Steering Board for 6 years

Decades of cross-functional industry experience in executive leadership for wild fisheries, aquaculture and feed sectors in business development, ESG, sales and procurement, certification, and operations

Previous positions include: **Vice President** – Grobest Seafood Global,

**Vice President** – Best Aquaculture Practices (BAP) division of the GAA

**President** – Surefish, Seafood Quality Specialists (now part of NSF)

**Director of Quality Assurance and Regulatory Affairs** – Emerald Seafoods



[www.linkedin.com/in/lisagoche](https://www.linkedin.com/in/lisagoche)



# *Sustainable Seafood - Agenda*

- Why it matters – to the world, and to Japan
- Pressure to improve is rapidly accelerating
- Ways to expand the % considered sustainable
- How GSSI helps the industry



# *Sustainable Seafood - Why it Matters*

- Growing population
- Increasing food insecurity
- Employment and economic development
- Many opportunities for Japan to grow consumption, exports, export value, and to lead in this sector in major markets and across Asia

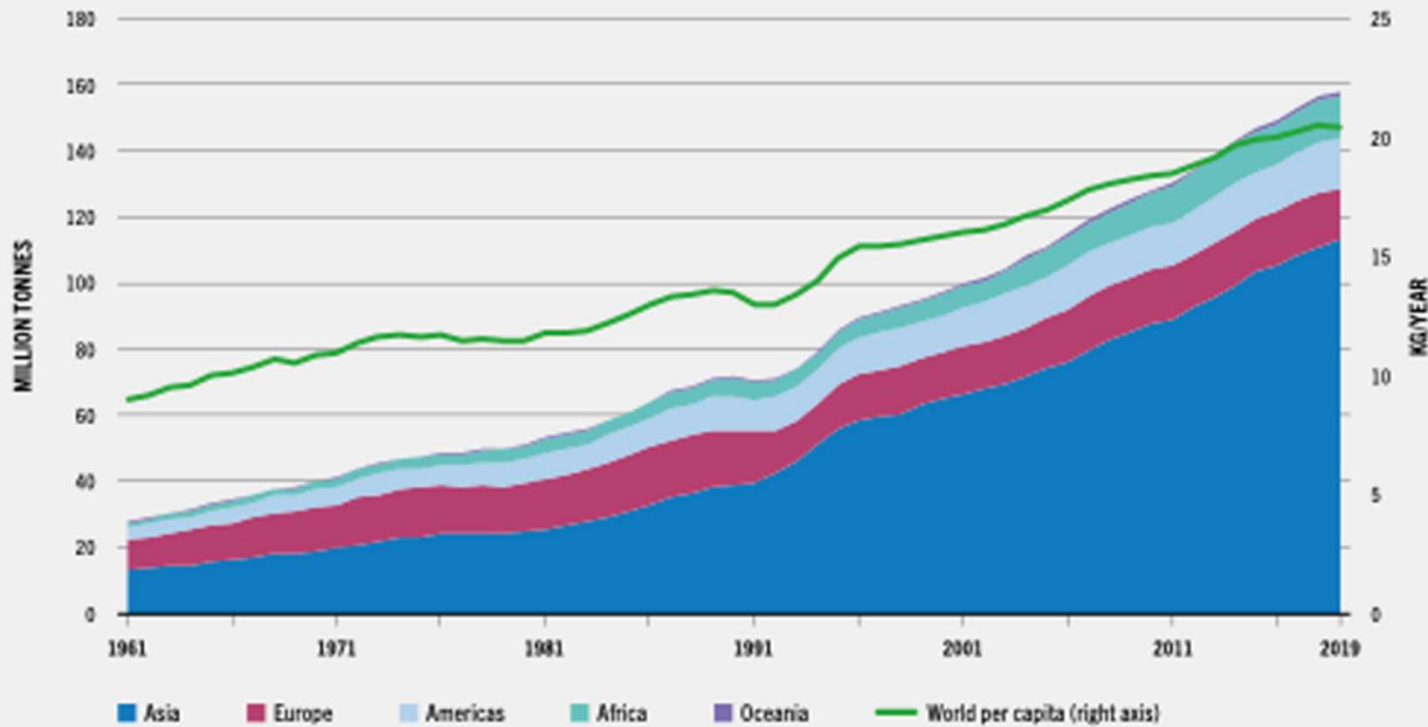
# Sustainable Seafood – Why it Matters

Population growth and a critical global food source

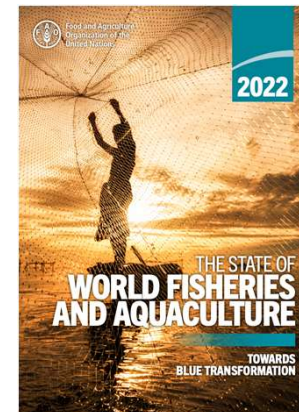
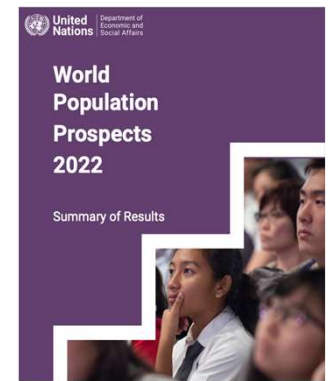
Global Population  
Estimates = Billions

2022	2030	2050
7.9	8.5	9.7

**FIGURE 39** AQUATIC FOOD CONSUMPTION BY CONTINENT, 1961–2019



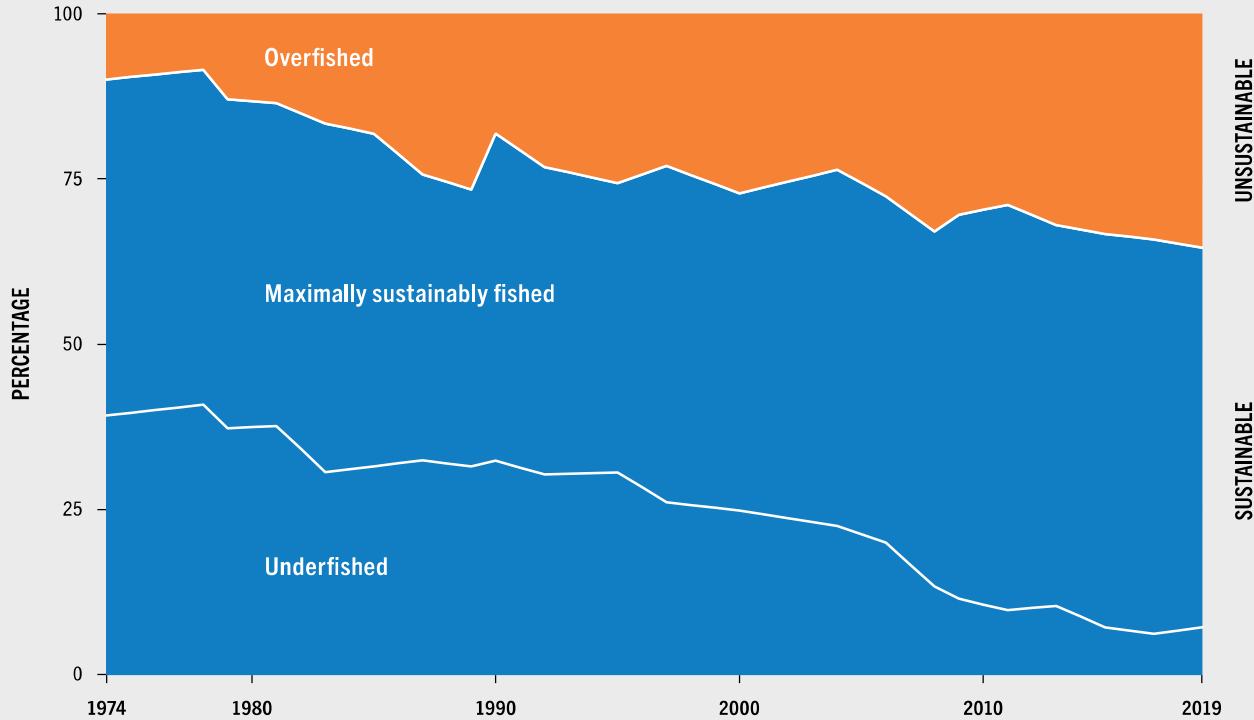
NOTE: Data in million tonnes expressed in live weight equivalent.  
SOURCE: FAO.



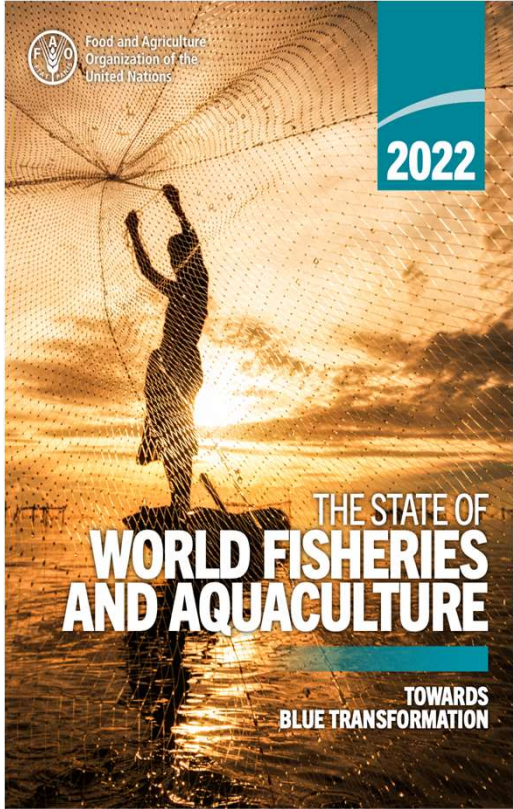
# Sustainable Seafood - Why it Matters

Increasing % of overfished stocks

**FIGURE 23** GLOBAL TRENDS IN THE STATE OF THE WORLD'S MARINE FISHERY STOCKS, 1974–2019



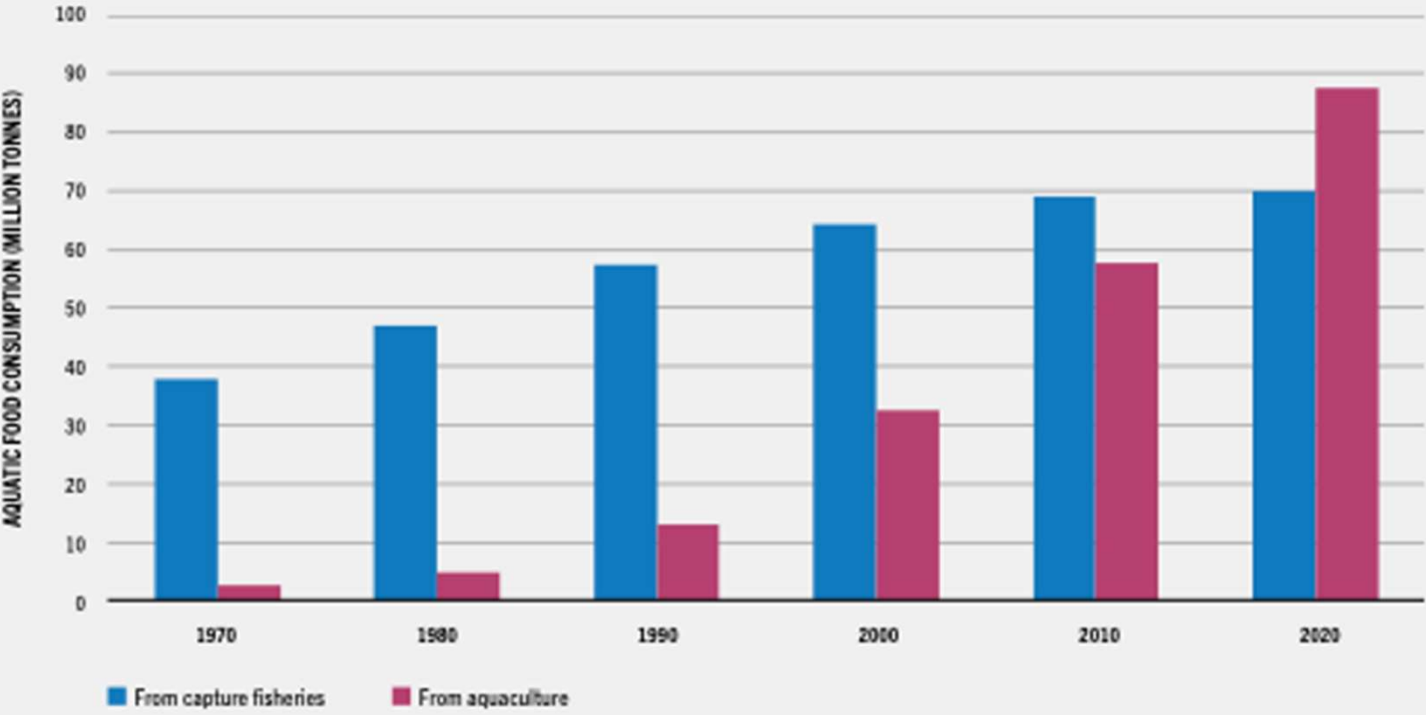
SOURCE: FAO.



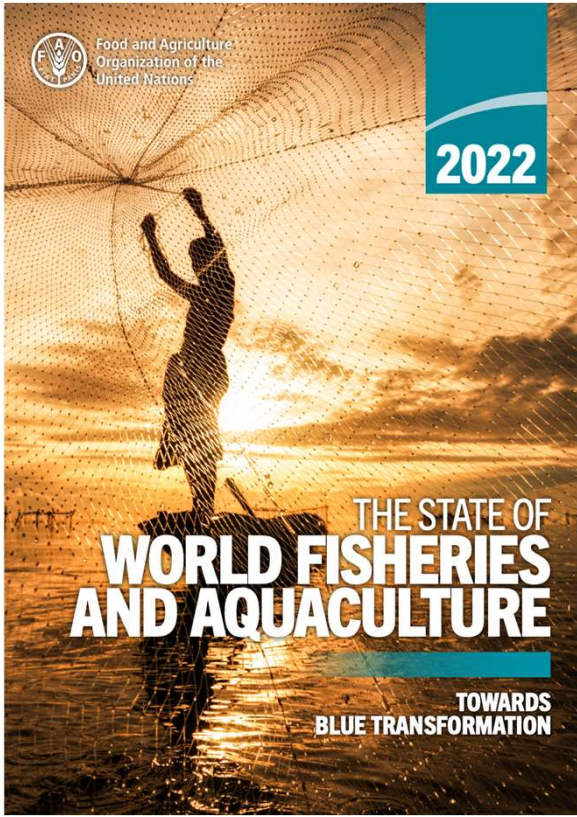
# Sustainable Seafood – Why it Matters

The increasing importance of aquaculture

**FIGURE 44** RELATIVE CONTRIBUTIONS OF AQUACULTURE AND CAPTURE FISHERIES TO AQUATIC FOODS AVAILABLE FOR HUMAN CONSUMPTION



NOTE: Data expressed in live weight equivalent.  
SOURCE: FAO.



# Sustainable Seafood – Why it Matters

## Nutrition, food insecurity

“Aquatic foods are increasingly recognized for their key role in food security and nutrition....a unique and extremely diverse provider of essential omega-3 fatty acids and...micronutrients”

Progress has been slowed by:

- **The pandemic**, regional conflicts
- Severe weather events, rising urbanization

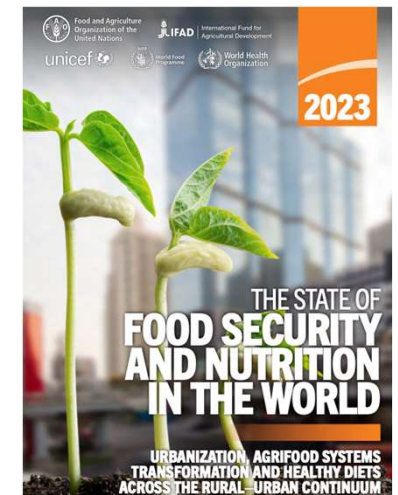
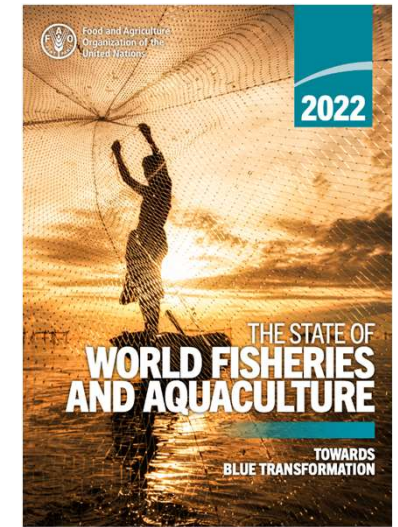
**9.2% - 727 Million People**  
(vs 7.9%)

% of undernourished in the world in 2022 (vs 2019)

% of animal protein provided by aquatic food globally = **17%** (**50%** in some countries)

**600 Million**

People depend at least partially on the sector for their livelihoods

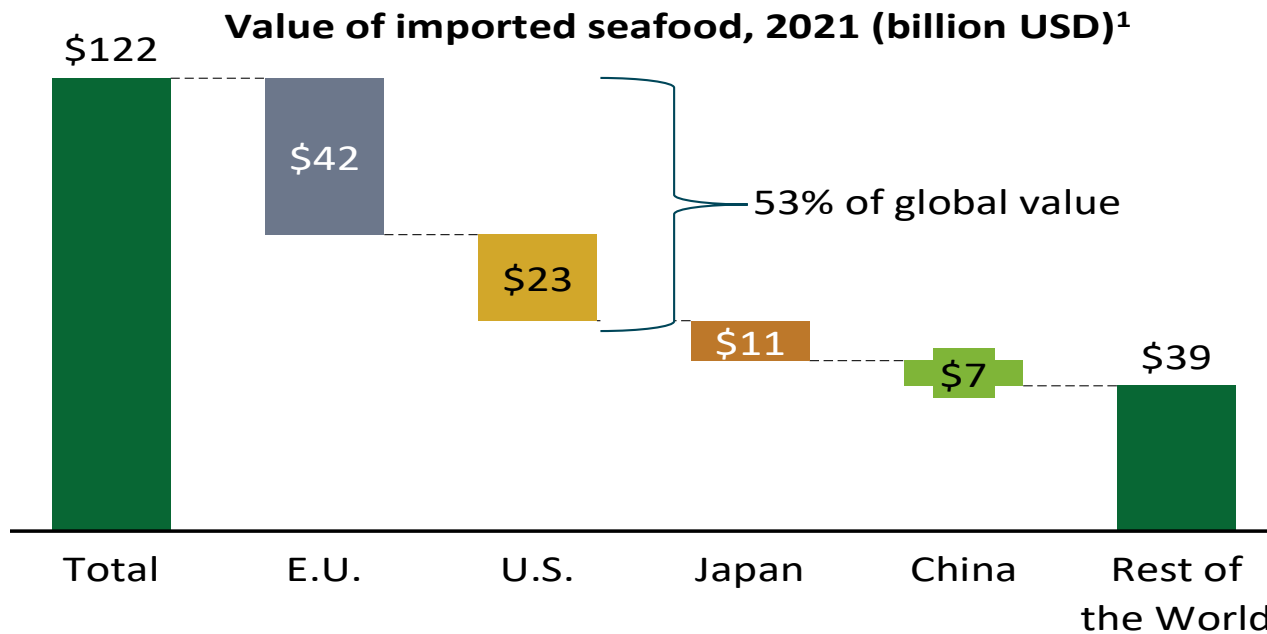




# Sustainable Seafood - Why it Matters

## Major markets with high demand for sustainable seafood

The quantity of globally traded seafood continues to grow. Asian seafood exports to North America remain the largest flow of seafood traded globally. The US and EU—markets with a strong demand for sustainable seafood—remain the highest-value importers of seafood, accounting for over half of the global imported value. China’s imports represent only 5.5% of global import value.



Source: Trademap.org.



**Progress Toward Sustainable Seafood -  
By the Numbers**

September 2022 Edition

CEA CONSULTING

WALTON FAMILY FOUNDATION

the David & Lucile Packard FOUNDATION



# *Sustainable Seafood - Pressure to Improve = Rapidly Accelerating*

(Where “improve” means join pre-competitive initiatives, get certified, and/or enter improver programs like FIPs or AIPs)

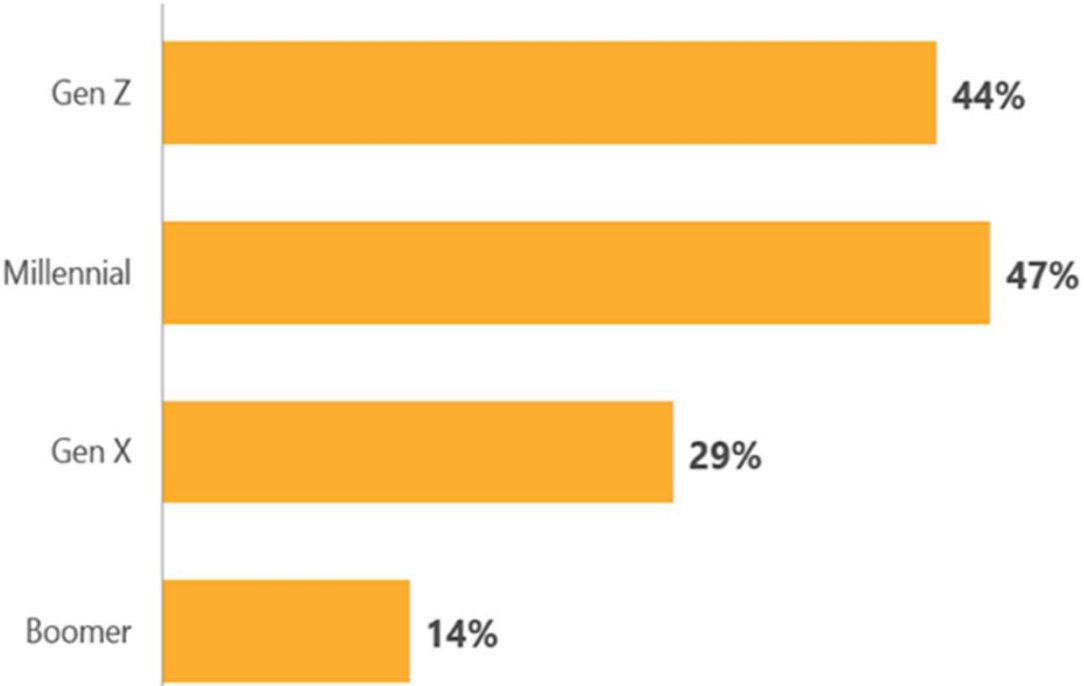
- Consumer demand
- Increasing media and NGO negative publicity
- Retailer/buyer/supplier – market access/brand reputation



# Sustainable Seafood – Consumers Increasingly Want It

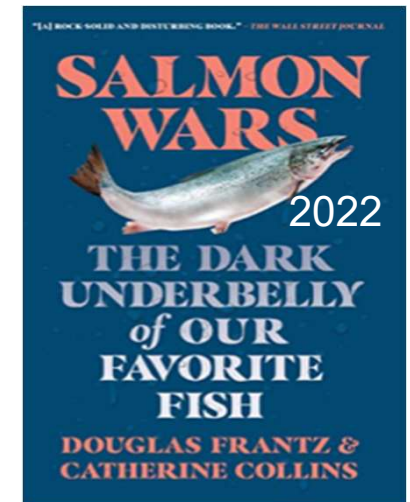
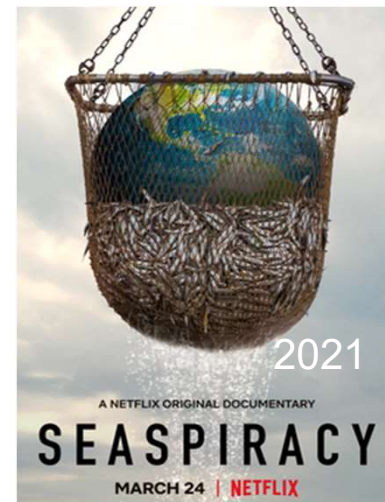
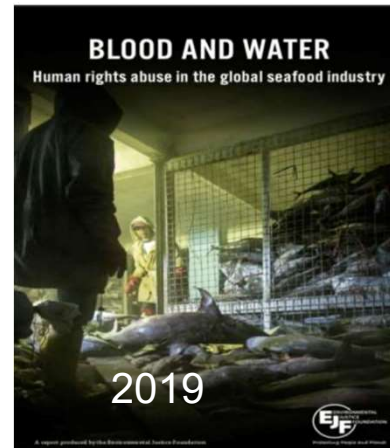
## Generational Shifts

I choose to shop at stores that prioritize sustainability



# Sustainable Seafood – Negative Publicity

## Sampling of Negative Reports Against Industry and Retailers



Major seafood players alleged to be connected to IUU fishing in Planet Tracker report

By Mark Godfrey  
December 8, 2021

# Sustainable Seafood - Consumer Demand, Brand Reputation



“Significant societal changes have influenced consumer decisions, particularly in affluent economies. Healthy eating has become a dominant trend...in the context of rising...obesity-related diseases in many countries. Demand for healthy and nutritious foods, such as aquatic foods, has risen in recent years.



This has been accompanied by increasing attention to sustainability of aquatic food systems, particularly its environmental and social dimensions. As a result, producers and retailers rely on a range of certification schemes and labeling to meet consumer demand for sustainable aquatic food”

Source: FAO

“**Ahold Delhaize** and its brands are working hard to make sure that all our own brand seafood is responsibly sourced. In practice this means buying seafood with trustworthy certifications recognized by the Global Sustainable Seafood Initiative (GSSI)”



“Where certification is not available, we work with partners like WWF in Greece...and the New England Aquarium in the US to take a ... critical look at our seafood assortment, and help us purchase only low risk seafood.”



# *Sustainable Seafood - How We Expand the %*

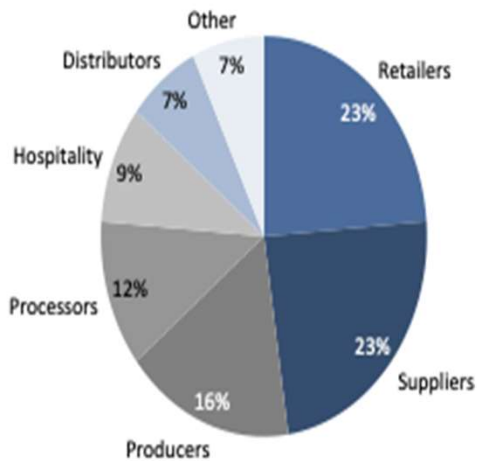
It Has to be a GLOBAL effort

- Precompetitive collaborations
- Government policies
- Third party certifications/eco-labeling
- Improver programs

# Sustainable Seafood - Precompetitive collaborations

2022 = “Almost 400 companies - primarily retailers, suppliers and producers – engage in 16 sustainable seafood precompetitive collaborations, up from 250 companies in 12 platforms in 2018. Among member companies, 76% are in North America and Europe, and most platforms are funded by both philanthropic and industry financial

Retailers and suppliers are the most represented in the precompetitive platform landscape



North America and Europe represent 76% of member companies across surveyed platforms



## Progress Toward Sustainable Seafood - By the Numbers

September 2022 Edition

CEA CONSULTING

WALTON FAMILY FOUNDATION  
the David & Lucile Packard FOUNDATION

Source: CEA, "Landscape Review of Sustainable Seafood Precompetitive Collaborations," 2021.

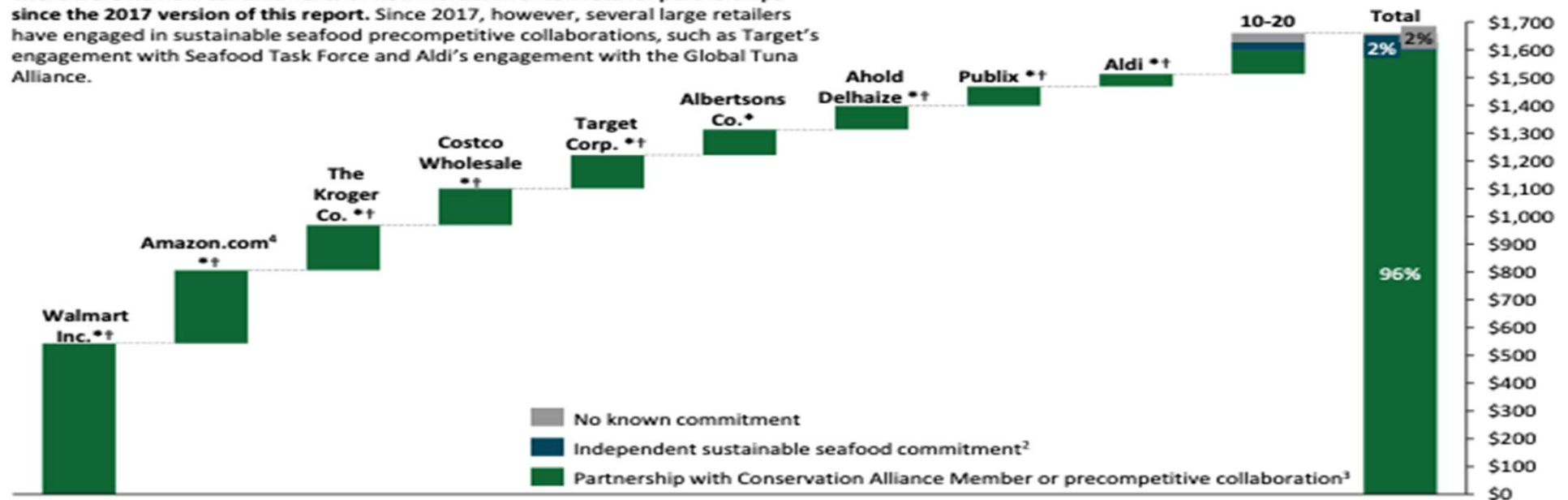
Packard Foundation and Walton Family Foundation | Progress Toward Sustainable Seafood - By the Numbers | September 2022



# Sustainable Seafood – Precompetitive Collaborations

**More than 90% of the North American retail market is covered by buyer partnerships with Alliance NGOs or engagements with sustainable seafood precompetitive collaborations**

There were no new commitments or new North American retailer partnerships since the 2017 version of this report. Since 2017, however, several large retailers have engaged in sustainable seafood precompetitive collaborations, such as Target’s engagement with Seafood Task Force and Aldi’s engagement with the Global Tuna Alliance.



**Top 10 North American Retailers<sup>1</sup> – Total Sales (Billions USD)**

\* Company is engaged in a buyer partnership with a Conservation Alliance NGO.  
 † Company is involved in a sustainable seafood precompetitive collaboration.  
 1. Companies included in this list are those that sell seafood.  
 2. Retailer has a dedicated webpage for seafood sustainability, describing sourcing commitments. Partnership data received in March 2022.  
 3. Retailer has an official partnership with an NGO member of the Conservation Alliance for Seafood Solutions or a sustainable seafood precompetitive collaboration.  
 4. Total sales includes Whole Foods, which has a partnership with Seafood Watch. Source: National Retail Federation, "Top 100 Retailers 2021 List," 2021.

Source: Progress Toward Sustainable Seafood - By the Numbers 2022 (Packard & Walton Family Foundations)

# Sustainable Seafood – Governments – Anti- IUU Examples

**Globally, 71 countries have committed to the Port State Measures Agreement to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing**, up from 66 countries in 2020. This is the first legally binding international agreement targeting IUU fishing. It was adopted in 2009 and entered into force in 2016. Yet global alignment on national import control schemes still requires strengthening to effectively deter IUU fishing.

**Leading regional and national import control schemes to combat IUU** include the EU Anti-IUU Regulation and the US Seafood Import Monitoring Program. In 2020, Japan passed the Improvement of Domestic Trade of Specific Marine Animals and Plants Act to prevent IUU-sourced seafood from entering the Japanese market.

**Active EU Red and Yellow Cards<sup>2</sup>**

Country	Card
Cambodia	Red
Comoros	Red
St. Vincent and Grenadines	Red
Ecuador	Yellow
Sierra Leone	Yellow
St. Kitts and Nevis	Yellow
Trinidad and Tobago	Yellow
Vietnam	Yellow

- Global - Port State Measures
- Japan- Improvement of Domestic Trade of Specific Marine Animals and Plants Act
- US – SIMP
- EU – Anti-IUU Regulation/Red & Yellow Cards

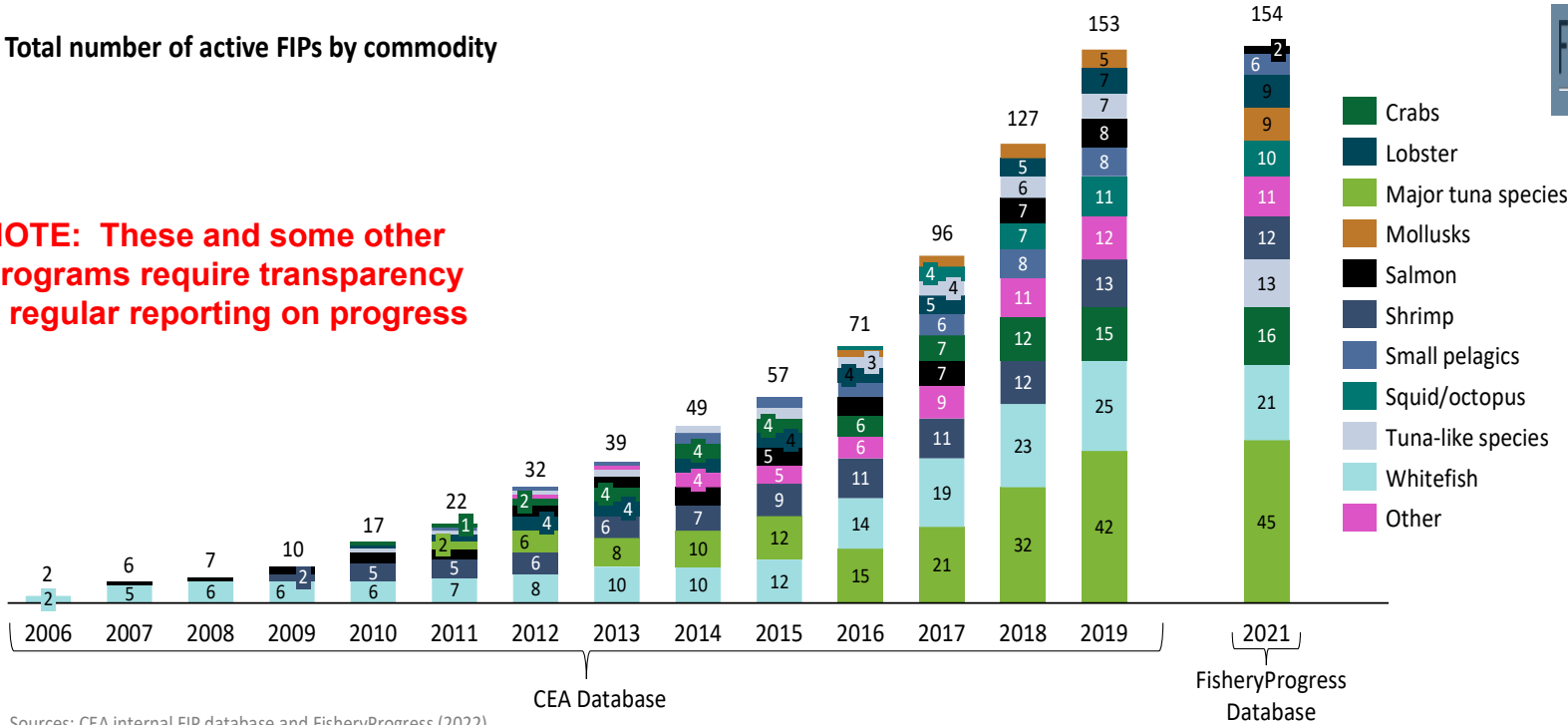
Source: Progress Toward Sustainable Seafood - By the Numbers 2022 (Packard & Walton Family Foundations)

# Sustainable Seafood - Improver Programs

FIP = Fisheries Improvement Project AIP = Aquaculture Improvement Project

Total number of active FIPs by commodity

**NOTE: These and some other programs require transparency - regular reporting on progress**



Sources: CEA internal FIP database and FisheryProgress (2022).  
 Note: The change in methodology for how FIP data is collected between 2019 and 2021 may have led to an underestimate of total FIPs in the most recent year available (FIP data for 2021 only includes FIPs reported on FisheryProgress, as opposed to CEA's internal FIP database, which monitored all global FIPs from 2006 to 2019). A detailed breakdown of FIPs by commodity is not available for 2020. FIPs that become inactive over time are also not shown. Some inactive FIPs reflect failure to meet reporting requirements, rather than inactivity on the ground. For a more detailed methodology of FIP accounting from 2006 to 2019, see the "2020 Landscape Review of FIPs."



# *Sustainable Seafood - How GSSI Helps the Industry*

- Reducing confusion
- Addressing duplication, rising costs, and “audit/initiative fatigue”
- Working in partnership with others to solve problems and create solutions
- Create confidence in credible 3rd party certifications/eco-labeling

# GSSI Today



8 GSSI  
Recognized  
Certifications



Promoting  
Cooperation across  
Initiatives & Partnering  
with the FAO



Food and Agriculture  
Organization of the  
United Nations

## Metacoalition



CONSERVATION ALLIANCE  
FOR SEAFOOD SOLUTIONS



Integrated in **sourcing**  
**policies** across the  
sector



### RESPONSIBLE CONSUMPTION OF SEAFOOD COMMITMENT

Iberostar's commitment to responsible tourism and the protection of the oceans is the backbone of our *Waves of Change* movement. Healthy global fisheries are foundational to global ocean health. Thus, Iberostar is setting a standard towards responsibly-sourced seafood while relying on gastronomic excellence to revolutionize the path towards responsible consumption.

By 2025, we commit to sourcing 100% of our seafood from responsible sources. In order to achieve this commitment, we define "responsible" as fisheries and farms that are:

1. Certified by a certification benchmarked and recognized by the [Global Sustainable Seafood Initiative](#) (GSSI).



### GSSI

The seafood industry and consumers struggle to make sense of eco-certification schemes because of their complexity. To help address this challenge, Acme Smoked Fish joined the Global Sustainable Seafood Initiative (GSSI) in 2021.

GSSI is shaping the future of sustainable seafood through creative and impactful public-private partnerships that include 90+ organizations across the sector. Acme is pleased to bring our history and experience to GSSI to help align and amplify a path forward for sustainable seafood certification that will benefit the ocean and industry.



90+ Partners engaged  
in the GSSI Global  
Partnership



# Sustainable Seafood - CONFUSING!!!

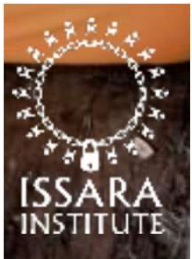


CERTIFICATION AND RATINGS  
COLLABORATION



Global Fishing Watch

Monterey Bay Aquarium  
Seafood Watch



Seafood Stewardship Index

GSSI has **successfully worked to reduce:**

- **confusion, duplication and rising costs associated with overlapping certification standards, initiatives and collaborations through our 5 tools**

GSSI **helps drive growth and confidence** in the sustainable seafood supply by **promoting credible:**

- **certification, improvement efforts, and cooperation - across the wild seafood and aquaculture supply chains**



# GSSI's 5 Tools

Promoting Sustainable Seafood Solutions



**Pre-competitive, Multi-Stakeholder Global Leaders**



**Ensure credibility, efficiency, and transparency in seafood certification**



**Provide clarity on social compliance through joint benchmark tool**



**Promote continuous improvement and scale impact, in particular in small-scale fisheries and aquaculture**



**Promotion of partners, recognized standards, industry progress, collaborations**







# GSSI'S GLOBAL PARTNERSHIP

For more information, visit [www.ourgssi.org](http://www.ourgssi.org)  
[secretariatl@ourgssi.org](mailto:secretariatl@ourgssi.org)

# GSSI'S PARTNERSHIP

## Helping the Sector by Leveraging Industry Leaders

- GSSI brings together industry leaders from around the world in a pre-competitive collaboration to create meaningful change and showcase the benefits of healthy, sustainable seafood
- Our partnership is multi-stakeholder - made up of processors, farmers, fishers, feed manufacturers, importers, retailers, food service distributors, restaurants, educational institutions, NGOs, funding organizations and governments

GSSI's solutions can help:

**Suppliers** - gain access to markets

**Buyers** - to meet their responsible sourcing commitments and goals

**Both** – to reduce risk and enhance their reputations



# GSSI's Pre-Competitive Partnership

## 18 Affiliated Partners

 <b>Food and Agriculture Organization of the United Nations</b>		
		
		
		
		
		
		

## 77 Funding Partners



# Global Impact

A unique Partnership working together towards more sustainable seafood

- Funding Partners
- Affiliated Partners
- GSSI-Recognized Schemes

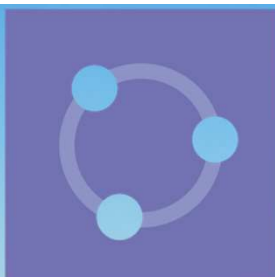
**+ \$30 Billion** Combined turnover of seafood companies

**+ \$500 Billion** Combined turnover of retail and food service Partners





GLOBAL  
BENCHMARK  
**TOOL**



**SSCI**  
COLLABORATION



# Benchmarking Solutions

# THE GLOBAL BENCHMARK TOOL (GBT)

## Environmental Certification

There are a large number of standards, codes and initiatives around the world related to seafood. Some overlap, creating confusion for suppliers, buyers and consumers =

Which certifications can you trust?

Our GBT was developed to reduce duplication, and environmental impacts associated with catching, producing, and supplying seafood to meet rising demand.

The Tool provides formal recognition of standards that successfully complete a voluntary, rigorous process, underpinned by FAO Ecolabelling Guidelines.



GLOBAL  
BENCHMARK  
**TOOL**



# Global Benchmark Tool

## Access to Markets

### Consumer distrust increases demand for assurance

“Major issues in the seafood industry like food safety and human rights issues, also raised in the recent controversial Netflix documentary Seaspiracy, **affect consumer trust in seafood**”

“The COVID-19 pandemic....also led to consumers placing greater emphasis on health and well-being, generating **increasing interest on where their food comes from**”

### Sustainable certified fish and seafood continues to gain market share

“Over the last years the [Global Sustainable Seafood Initiative](#) (GSSI) worked on a benchmark system for sustainability certification....The GSSI assures that approved certifications are aligned with the FAO Code of Conduct... and are therefore the best to use.....**As a result, we are seeing a gradual shift in retailers from a commitment to selling seafood with specific eco-labels such as ASC and MSC, to a commitment to selling seafood which is certified by any GSSI-benchmarked standards.** This provides an opportunity for you as an exporter, as more seafood certifications schemes are accepted on the European market”

Source:



CBI  
*Ministry of Foreign Affairs*

**Center for the  
Promotion of Imports  
from Developing  
Countries**

The Netherlands

<https://www.cbi.eu/market-information/fish-seafood>

# Sourcing Policy References to Global Benchmark Tool



# GSSI-SSCI Collaboration

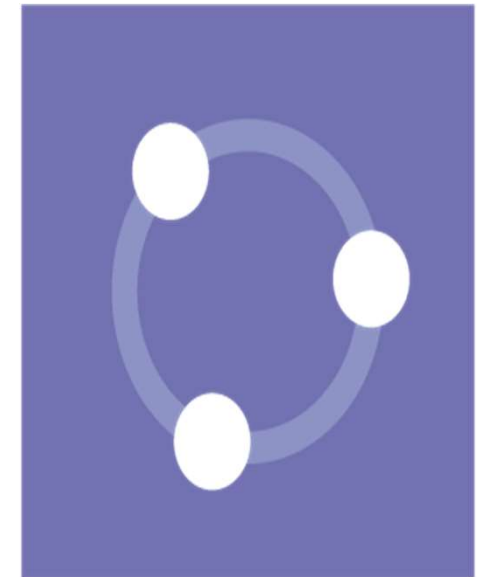
## Social Responsibility Certification

Safeguarding human rights are crucial priorities. At the outset, GSSI's mandate included both environmental and social issues. **After successfully implementing the GBT, we looked at similar confusion and gaps in social certification**

- **To avoid duplication, GSSI looked at existing frameworks**
- SSCI – The Sustainable Supply Chain Initiative – Benchmarking social standards
- Developed by CGF (The Consumer Goods Forum), but not specifically for seafood. **The partnership with GSSI resulted in criteria specifically for fisheries and aquaculture.**

NOTE: The CGF is a well-known retailer/manufacturer alliance that created the food safety benchmark – The Global Food Safety Initiative (GFSI).

They have several member companies in Japan, and an office in Tokyo



**SSCI**  
**COLLABORATION**



# Our SSCI Collaboration

Recognition of Credible Social Certification Programs So Far



In progress

NOTE: The SSCI Social Benchmark for seafood is fairly new, having been finalized only a few years ago



# GSSI's Seafood MAP Program

For more information, visit [www.ourgssi.org](http://www.ourgssi.org)  
[secretariatl@ourgssi.org](mailto:secretariatl@ourgssi.org)

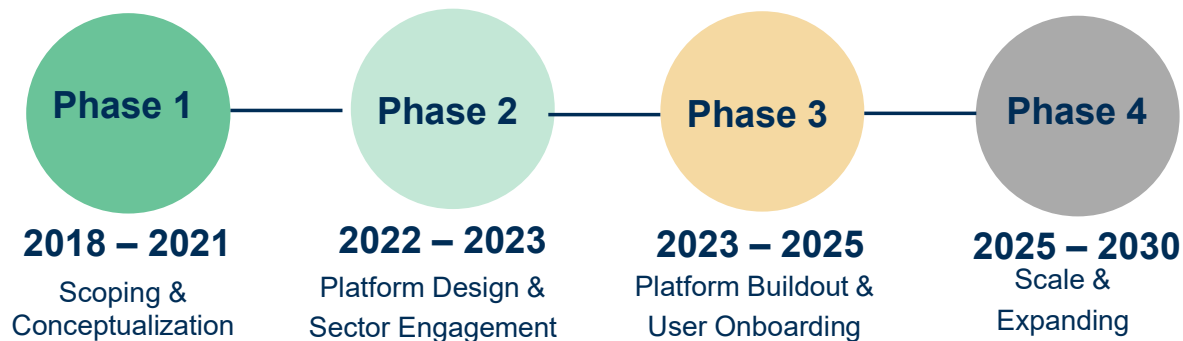
# GSSI's Seafood MAP

## What we are working towards

The world needs more sustainable seafood, but the cost and complexity of certification or improver programs leaves many out

Seafood MAP is being developed by GSSI to fill these gaps and better connect the entire sector to grow the sustainable seafood supply

Seafood MAP is a digital platform that allows seafood actors – regardless of size or location, to map and/or improve their sustainability efforts through a powerful combination of storytelling and impact measurement against the UN SDGs



Seafood MAP provides new ways for producers, buyers, and investors globally to:

- connect to markets and each other
- find resources
- understand funding opportunities.



# GSSI's Global Outreach

For more information, visit [www.ourgssi.org](http://www.ourgssi.org)  
[secretariatl@ourgssi.org](mailto:secretariatl@ourgssi.org)

# GSSI's Global Outreach

## Amplifying Sustainable Seafood

GSSI promotes confidence in the seafood supply chain.

We publicly communicate about our partners, recognized standards, industry progress, and global collaborations through our:

- Website – Information, Publications & Announcements
- Newsletters
- Social Media Postings
- Spotlight Series
- Public Speaking



# GSSI's Global Outreach

## Example – MEL Japan Recognition in Seafoodsource.com

### **Marine Eco-Label Japan becomes ninth seafood certification recognized by GSSI**

Seafoodsource.com - Madelyn Kearns  
December 16, 2019



Formal recognition has been granted to the Marine Eco-Label Japan (MEL) V2 certification scheme by the Global Sustainable Seafood Initiative (GSSI), the organization announced this month.

The recognition from GSSI signifies that MEL's Aquaculture Management Standard (Version 1.0, 2018) and Fisheries Management Standard (Version 2.0, 2018) align with the GSSI Global Benchmark Tool (Version 1.0, 8 October, 2015), which itself is supported by the FAO Ecolabeling Guidelines and the FAO Technical Guidelines for Aquaculture Certification. The tool focuses on "performance areas related to scheme governance, operational management (including chain of custody), and applied aquaculture farm and wild-capture fisheries audit standards," GSSI said.

The MEL scheme has become the ninth seafood certification to be benchmarked successfully against GSSI's Global Benchmark Tool. Now all products that receive MEL certification can be identified by a special logo including the V2 mark, highlighting GSSI compliance.

"This recognition demonstrates how the Global Benchmark Tool supports schemes and promotes improvement" GSSI Managing Director Herman Wisse said.

Marine Eco-Label Japan (MEL) Council President Naoya Kakizoe said the GSSI benchmarking was a milestone for the Japanese seafood industry.

"Today marks an important step for Japan's seafood sector and for the Japanese aquaculture and fisheries industry," Kakizoe said. "Since February 2017, the MEL Council, in collaboration with Japanese stakeholders, has continuously improved our scheme governance and operational management to harmonize Japan's rich diversity of nature, culture, and fishing industries with the FAO guidelines as outlined in the GSSI Benchmark Tool."



# GSSI Event attendance

2023 Q1-Q2

## Seafood Expo North America

- 10 Year Anniversary Reception
- Panel with Sustainable Supply Chain initiative (SSCI)



## Global Sustainable Seafood Galicia Forum

- Panels on social compliance and SDG contributions
- Roundtables



## Seafood Expo Global

- Scheme Owner Advisory Group meeting
- GSSI Partner Meeting
- Seafood MAP Website Launch event



## Up Next

- Japan
- Seafood Expo Asia
- FAO Committee on Fisheries





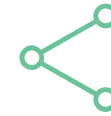
# Please Join Us in Helping the Seafood Industry Through Your:



**Support**



**Leadership**



**Commitment**





**Thank You!**

For more information, visit  
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[Secretariat@ourgssi.org](mailto:Secretariat@ourgssi.org)

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