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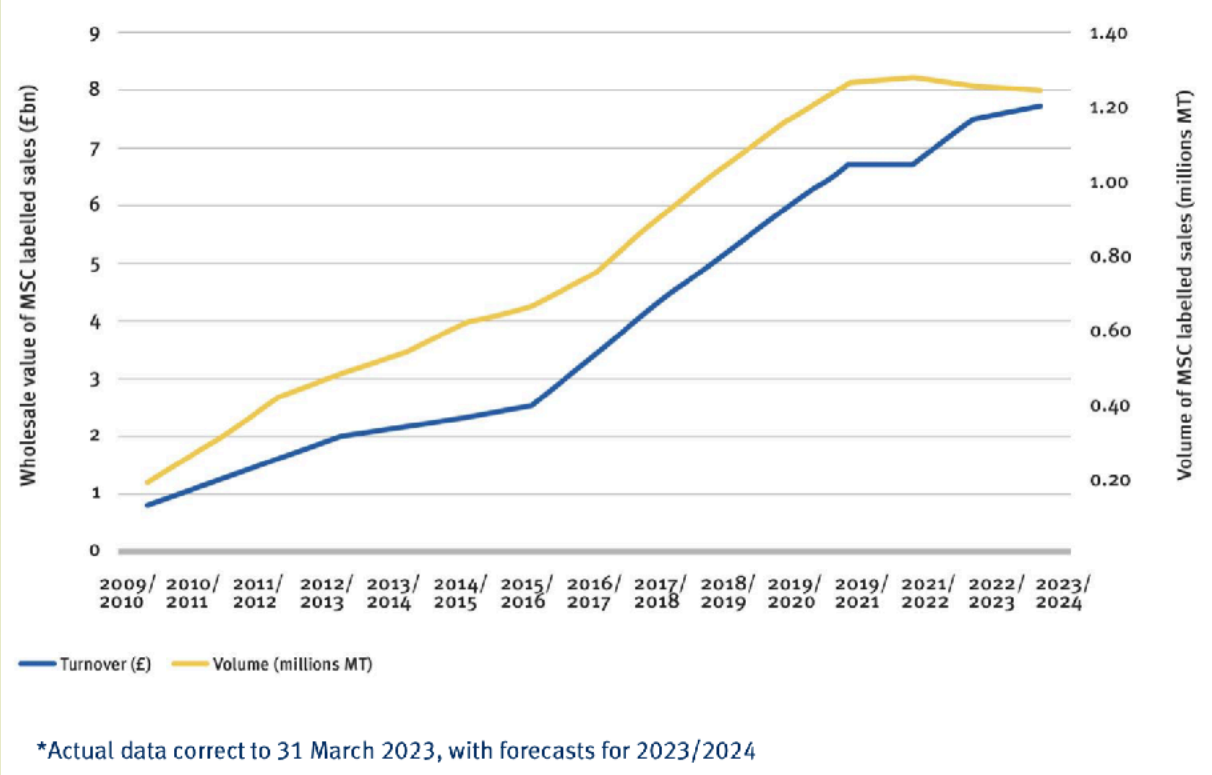
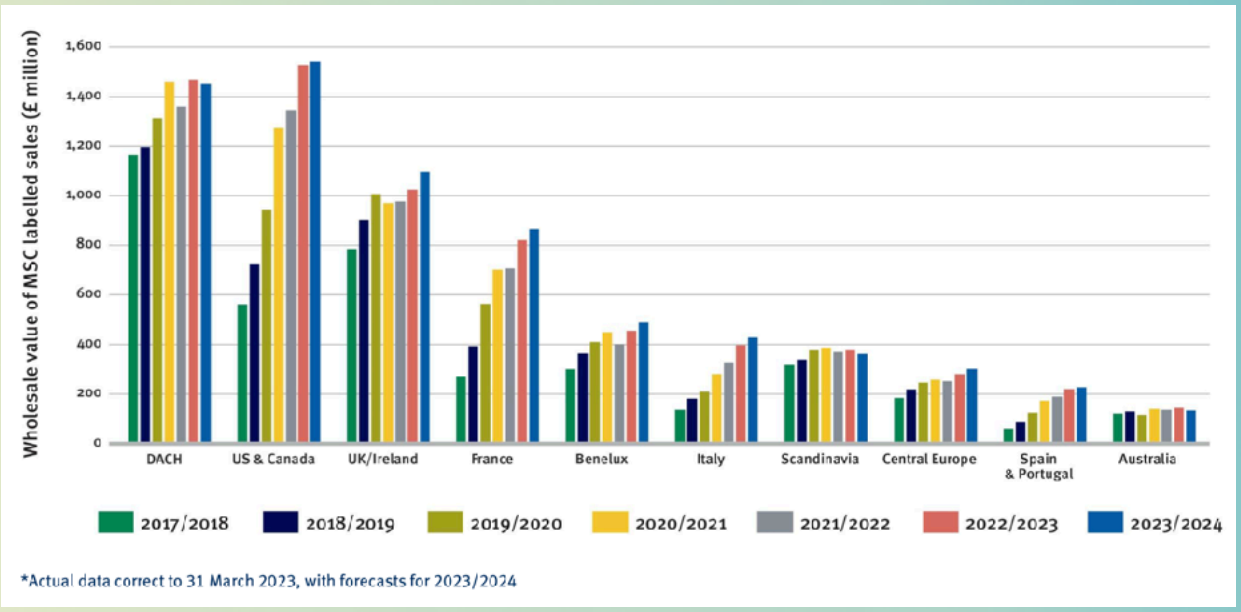
Seafood certification or the law of saturation

Trees never grow into the sky. Every growth process culminates in a peak from which growth declines. We recently discussed this in the example of the fish farming industry, which has long since passed its peak in virtually all regions and for all species [1]. Same is true for seafood certification schemes.

Since the MSC fisheries label was founded in 2000, the certified volume has increased sharply year on year—but since 2021, the annual volume has been declining (Graph 1, do not be misled by the euphemistic title MSC added to it). The main reason for this is saturation in the two most important MSC markets, in the German-speaking countries of Europe (D-A-CH) and in the USA and Canada (Graph 2).



Graph 1 — 'Value of MSC labelled products continues to grow'
Title in a MSC presentation of 24 April 2024 [2]



Graph 2 — ‹Top 10 regions for MSC labelled sales›
Title in a MSC presentation of 24 April 2024 [2]

The problems caused by industrial fishing cannot be solved by labelling. Labels are important to set concrete examples — some stricter, others more lax — but ultimately the examples must be followed by political measures.

Only a quarter of wild seafood is certified

In 2014, certified seafood (from catch and farming) accounted for 14% of global seafood production, having increased by 35% annually since 2003. Certified wild seafood almost always was labelled Marine Stewardship Council (MSC) or Friend of the Sea (FOS), whereas six main certification schemes were active in aquaculture. [4]

In 2015, MSC and FOS each certified around 9 million metric tonnes [5], which in the case of MSC corresponded to around 10% of the (reported) global catch, whereas part of the FOS volume also included farmed seafood.

Currently, certified wild seafood is unlikely to account for much more than a quarter of the global catch, given the 16% share reported by MSC for 2023 [3] and the 9% share last reported for 2015 for FOS mentioned above. It can be assumed that FOS has since experienced a similar peak effect as MSC.

Certified farmed seafood still in the single-digit percentage range

The percentage of certified farmed seafood is even more difficult to determine as the scene is very complex and most players report the numbers of farms and products but not the metric tonnes. The Aquaculture Stewardship Council (ASC) stated in 2022 that it had certified 31% of all farmed salmons, 3% of all pangasius, 3% of all shrimps, and 1% of all mussels [6]. According to its 2021 Annual Report, ASC has

Drawing: Kasia Jackowska

certified over 2.5 million metric tonnes [7], which corresponds to 3% of all seafood farmed worldwide. Organic seafood is still a niche with a share of probably less than 1%. Other certification schemes do not report quantities or mix quantities with wild-caught seafood.

We can assume that the total share of somehow certified farmed seafood is still far below 10%. But we can also expect that this percentage will increase considerably as several organisations are at work while the growth of aquatic animal farming has peaked.

Even less benefit for the wild animals concerned

Certification in fisheries is still limited to environmental and social concerns, while animal suffering is not yet an issue. But even if the MSC and FOS standards were to include directives to reduce animal suffering, much less than a quarter of all fishes caught would benefit from certification—only around 3%, according to a scientific estimate for 2015 [8]. This is because certification (with its costs and bureaucracy) is mainly tackled by fisheries that supply the markets of industrialised countries, i.e. fish of sought-after species, whereas lesser-known species of smaller size are caught for the local population in developing countries and to an ever-increasing extent for the production of fish meal and fish oil for feed in aquaculture. Reducing animal suffering in fisheries through labelling will therefore be a long road ahead, as certification only covers only a very small proportion of all animals involved. However, projects like carefish.net and catchwelfareplatform.com are an important first step in bringing the issue to the public's attention.

Possible modest benefits of certification for farmed animals

Aquaculture certification schemes such as ASC or FOS are on the way to integrating animal welfare directives into their standards. FOS has already implemented detailed directives in 2021 [9], based on studies conducted by fair-fish. However, a report on the experiences in this area is still pending.

The research was funded by Open Philanthropy. The foundation also supported other projects aimed at incorporating animal welfare provisions into existing aquaculture standards, including ASC. The ASC fish welfare standard was submitted to the final stakeholder round in May 2024, to which think.fish critically commented [10]. Both labels will mainly certify the farming of species which are not able to experience welfare in captivity, as shown by the welfare potential scores of the fair-fish database [11].

References

[1] Billo Heinzpeter Studer (2023), Can aquaculture deliver? fish-facts 41 (page 10)

[2] MSC Seafood Futures Forum 2024

[3] MSC Annual report 2023

[4] Jason Potts et al (2016), Standards and the Blue Economy

[5] FOS Annual Report 2019-2020

[6] ASC Annual Impacts Record 2022

[7] ASC Annual Report 2021

[8] Alison Mood, Phil Brooke (2024), Estimating global numbers of fishes caught from the wild annually from 2000 to 2019

[9] FOS-Aqua Fish Welfare Standards

[10] think.fish Factsheet #2 Critical comments on ASC

[11] fair-fish database