

GLOBAL IMPACT REPORT

Celebrating our year in
advancing responsible
seafood practices

*1st
Edition*
September 2022

2022 Global Seafood Alliance (GSA)

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Editor-in-Chief: Justin Grant

Editors: Maddie Cassidy, James Wright

Project leads: Elise Avallon, George Chamberlain, Steve Hart, Steven Hedlund, Mike Kocsis, Dan Lee, Carlos Ramirez, Kota Shibai, Melanie Siggs, Belinda Yaxley, Iris Xin Wang,

Graphic & illustrative design: Justin Grant



When I attend our all-staff meetings at the Global Seafood Alliance every Monday morning, I'm always astounded at the amount of work being done around the world to advance responsible seafood practices, and the impact that work is having. This report, our inaugural Global Impact Report, is our way of inviting you into that meeting – to get comprehensive insight into the advocacy, education, and certification work GSA and our partners are carrying out, country by country. On behalf of every employee of Global Seafood Alliance, we thank you for your continued support in advancing responsible seafood practices around the world. We are delighted to share some of our projects and initiatives, and encourage you to support our continued work by becoming a member of GSA.



Brian Perkins
GSA - CEO

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Thank You GSA Members!



Member Spotlight

Lourdes Gant - Managing Director, Manatee Holdings Ltd. and individual member of GSA

Why did you join GSA?

Answer: The resources GSA provides have been a tremendous help, not only for finding out what is happening in the industry, but also to get to know the trailblazers. I find that the experts are not only very generous but very supportive as well.

What about responsible seafood motivates you most?

Answer: Responsible seafood is going to be a crucially important part of the sunrise solution to feeding 9.7 billion people by 2050. Becoming future positive will help integrate us to, not only the challenges and obstacles, but also the strengths and opportunities in our industry.

All of the initiatives outlined in this report are made possible by the Global Seafood Alliance's corporate and individual members.

Their support enables our organization to carry out projects that advance the responsible seafood space around the world through advocacy and education.

Are you interested in showing your public support for GSA's impactful projects through membership?

**CORPORATE MEMBERSHIP**

Annual Membership Benefits | \$5,000 per year

- ✓ Public recognition that your company supports responsible seafood:
 - ✓ Your company listing on the GSA website
 - ✓ Your company's logo listed on the Corporate Membership webpage
- ✓ Discount to in-person GOAL events
- ✓ Company profile on the virtual GOAL platform
- ✓ Access to the GSA Member Toolkit (infographics, production data, etc.)
- ✓ Social media mentions across organization channels
- ✓ Feature on the GSA Blog
- ✓ GSA Newsletter mention
- ✓ Benefit accessibility to all staff members

Email us: membership@globalseafood.org

GSA Corporate Members

Becoming a corporate member is a way for your company to demonstrate support for progress towards responsible seafood practices worldwide. Corporate membership is the closest way an external producer or business can align itself with GSA. Thank you to the GSA corporate members who are partnering with us to further our shared mission of responsible seafood practices.





Chinese seafood consumer survey gleans important insights for BAP



Seafood Consumption in China

Market Research Study
2022 Online Survey



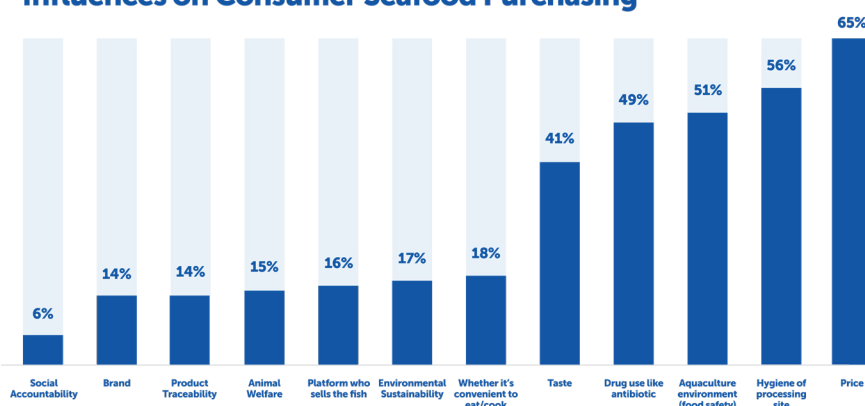
BAP is one of the major programs to promote responsible aquaculture practices in China. It's important to explore which of the four pillars resonates the most with Chinese consumers and their impressions of BAP and what it stands for.

With these encouraging results, more and more Chinese producers may be willing to align with BAP standards to become more environmentally and financially sustainable.

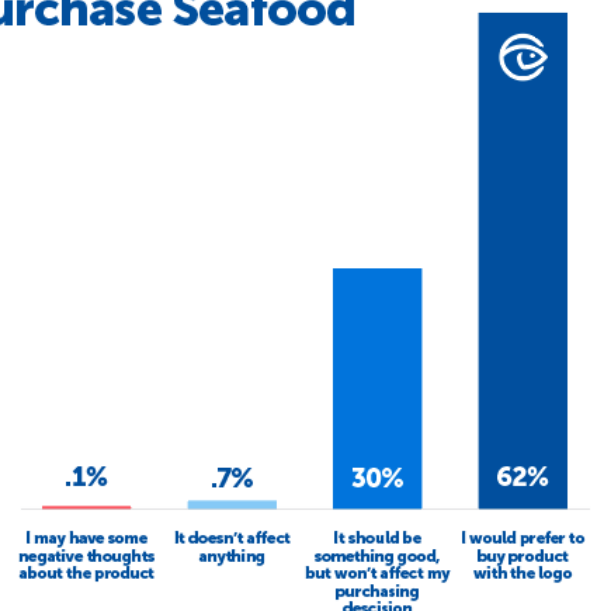
To learn more about seafood consumption in China, GSA launched an online survey in May and received 2,698 valid questionnaires in response. Besides some general data shared publicly, the full report is provided as a GSA member benefit. Available now in both English and Chinese.

We broke down the answers to the seven survey questions according to the respondents' age, gender, income and other demographic indicators. Encouragingly, more than 90% of respondents have positive impression on product with the BAP logo on the pack, and 60% say they prefer seafood with the BAP logo when purchasing.

Influences on Consumer Seafood Purchasing



Impact of BAP Label on Consumer's Decision to Purchase Seafood



Iris Xin Wang

Market Development Manager - China

If GSA members have further questions about seafood consumption trends in China that are not covered in this report, please feel free to reach out to us, as we're happy to add that into future research. We hope this information is helpful for GSA members interested in the Chinese seafood market.



Giving vessel workers a voice

The Global Seafood Alliance believes “responsible” should address an additional pillar. Environmental, social, food safety and animal welfare are the original four, but the social aspect of wild-capture seafood has been overlooked until quite recently. Given the high level of migrant fish crew coupled with the invisibility of working at sea it is important that the sector addresses this important area in a robust way. GSA’s Responsible Fishing Vessel Standard (RFVS) is an important step in that direction.

From 2018 to 2020, GSA led work to develop a world-class standard for the wellbeing of fishing vessel crews. The work involved global stakeholders and used conventions such as ILOc188 as the base of the standard. Following the final public consultation, it became available for use in May 2020.

In developing the RFVS, some aspects of the global conventions were more difficult to develop into auditable indicators than others. One area of concern was ensuring crew have safe access to grievance mechanisms, and in turn that these mechanisms have meaningful and measurable resolution procedures. Furthermore, it was noted that on land such procedures, while often still challenging, are easier to implement and monitor.

In response, GSA documented work that explored options for these mechanisms on fishing vessels, including pilots and their outcomes. The results were made public in December 2020. A supplementary piece of work explored some aspects in greater detail. There was no consensus on what was generically appropriate or available for fishing vessel crews.

In late 2021, GSA began to determine expectations for worker voice and grievance mechanisms on certified fishing vessels. As new fishing vessel standards focused on crew welfare emerged, and as a benchmark for at-sea standards was reaching conclusion, retailers and NGOs were beginning to include the requirement of fishing vessel crew standards. The expectations for worker voice and grievance mechanisms could help determine where “better” and “worse” could be mapped to find pathways for improvement.

GSA is grateful to receive continued funding for this work from the David & Lucile Packard Foundation. GSA contracted Key Traceability to work on the project.

As of this June, the project team has a list of 60 bilateral interviews under way, of which some 32 have been completed. The aim is to engage different stakeholders globally, from recruiters to fishing vessel owners and from seafood buyers to NGOs. To help interrogate the outcomes and fill gaps of outreach or research there is an oversight committee supporting the project. Key Traceability and GSA have several in-person meetings planned that will bring groups of stakeholders together to further discuss the subject.

Bilateral interviews and in-person meetings will continue. The outcomes of these conversations will be summarized in a report toward the end of 2022 that will provide recommendations of what is possible and what can be expected on certified fishing vessels with immediate effect; it will also provide observations of how safe worker voice and grievance mechanisms for fishing vessel crew might be improved – both in terms of process and usage – in the near term. This report will be publicly available. The outcomes will guide the appropriate indicators in the Responsible Fishing Vessel Standard, with any changes being made through the GSA governance procedure.



Melanie Siggs

Director of Strategic Engagements



BAP launches its first-ever consumer-facing marketing campaign

The Global Seafood Alliance is launching its first consumer marketing campaign in October to coincide with U.S. National Seafood Month. To capitalize on consumers' shift to more seafood consumption and preference for fish that's responsibly sourced, the campaign will communicate directly with consumers to increase brand awareness of the Best Aquaculture Practices (BAP) label and ultimately drive sales of responsibly produced and sourced seafood.



The campaign, dubbed “[Healthy Fish, Healthy Planet, Healthy You!](#),” is designed to heighten awareness of the BAP brand in the United States. Along with traditional media outreach, social media and influencer engagement, the program will also offer a toolkit with print and digital assets to make it easy for any retailer or foodservice operator who endorses the BAP program to participate. As part of the campaign, BAP also recently launched a [consumer website](#) that provides additional information about the label, nutritional information, recipes and resources for those who want to learn more about aquaculture. Partners participating in the campaign will be featured on the [Where to Find](#) page on the BAP website.

In conjunction with the consumer-facing website, BAP also launched a social media campaign in July using the hashtag #AreYouAquaCultured. The campaign aims to encourage consumers to become more “aquacultured,” with content that educates consumers about the benefits of aquaculture, what BAP standards cover, how to prepare different seafood dishes, and encourage them to look for the BAP label.



The campaign toolkit will be available to partners in advance of the official launch for National Seafood Month. BAP is also working with social media influencers to increase awareness and encourage people to look for the BAP label when shopping for seafood. This campaign contributes to both the “education” and “demonstration” pieces of GSA’s mission.



Elise Avallon

Manager of Certification Marketing



Promoting BAP through institutional foodservice

Consider where seafood is sold. What might first come to mind is a retail store or a restaurant. However, there are many other businesses selling seafood that you might not think of initially. Surprisingly, cafeterias in large corporate offices or in residential businesses like hospitals and nursing homes are places where large amounts of seafood are bought and sold around the world.

Obayashi Corporation, one of the five largest general construction companies in Japan, has started using Best Aquaculture Practices (BAP)-certified shrimp at their head office's cafeteria in Tokyo, with its first event happening on May 18, earlier this year. Obayashi intentionally chose to provide BAP-certified seafood to demonstrate to their workers that their company cares about how the seafood they serve their employees is produced – and that they themselves should, too.



This first event started small, but since the first one went well, our team in Japan is considering how we can assist Obayashi with expanding this project within the company through additional events, and even continuous usage of BAP-certified seafood in the cafeteria. Beyond that, our team is examining how we can replicate this initiative in other organizations, as well.

Obayashi Corporation employees are also everyday seafood consumers, so our hope is that they will choose BAP-certified products for future seafood celebrations now that they are familiar with BAP from Obayashi, and trust what the label stands for.



As a part of this initiative, Obayashi provided BAP-certified shrimp (deep-fried over a bowl of rice with special sauce) in cooperation with its foodservice provider. In addition to shrimp servings, Obayashi also exhibited posters and other marketing collateral to educate their employees about BAP and the positive impact the selection of this shrimp has on the production site.



Kota Shibai

Japan Market Development Coordinator



2 ZERO HUNGER



8 DECENT WORK AND ECONOMIC GROWTH



10 REDUCED INEQUALITIES



New collaborative workstream aims to solve marine ingredient sourcing

The Global Seafood Alliance (GSA) has partnered with the Global Roundtable on Marine Ingredients to start a workstream focused on filling gaps in supplies of responsibly produced marine ingredients in South and Southeast Asia. The initial focus of this project is to work with MarinTrust, Sustainable Fisheries Partnership (SFP), The Marine Ingredients Organization (IFFO) and other Roundtable stakeholders to develop solutions to provide locally sourced, responsibly produced fishmeal and fish oil for use in the aqua-feed industry. The Roundtable has already been working in the Gulf of Thailand to develop solutions for Southeast Asia, so the GSA-led workstream focuses on responsible fisheries supplies in India.

Aquafeed producers in India are experiencing challenges in sourcing fishmeal and fish oil from certified responsible fisheries or fisheries in assessment through a Fisheries Improvement Project (FIP). Historically, there have been efforts to develop FIPs in India, but only one is currently active. Additionally, the imposition of government duties on imported fishmeal (taxed at 20 to 25%) have threatened the ability of Indian feed mills to meet the demand from the global marketplace to provide aquaculture products that are produced with responsible aquafeeds. These factors have led to GSA's interest in starting a workstream with the Roundtable to bring together industry participants willing to develop solutions.

Seafood purchasers around the world have made commitments to sourcing responsibly produced seafood, which includes responsible ingredient sourcing for aquafeeds destined for use by the aquaculture industry. India is a major supplier of shrimp products to retail and foodservice companies around the world, so there is strong interest in assuring that Indian feed mills have access to responsibly produced fishmeal and fish oil.

GSA is working with Key Traceability to lead the workstream. The initial goal of the workstream is to develop a written plan to help advance FIP development in India based upon identified needs and recommended pathways from local experts, industry and market representatives. Multiple stakeholders will be engaged to move this project forward until active FIPs are in place.

An initial mapping document has been developed based upon a literature review of historical activities to develop responsible fisheries in India. In order to support the industry, GSA has modified its feed mill standard to allow feed mills in countries without direct access to currently recognized sources of responsibly sourced fishmeal and fish oil to meet sourcing requirements by becoming actively involved in FIP development. Currently, the workstream is focused on conducting industry interviews to further understand the current conditions within Indian fishmeal and fish oil fisheries.

The next step for the workstream is to build a coalition of stakeholders to participate in Indian FIPs. While starting in India, this project has relevance to fisheries throughout Asia and beyond. This project will develop a roadmap on how to build coalitions within industry to support responsible fisheries.

This project is a first for GSA in how it stretches across both the wild and farmed seafood sectors. It advances GSA's mission by driving improvements in both wild fisheries through the development of FIPs and aquaculture through responsibly produced aquafeeds. Additionally, this project helps support livelihoods of both fisher people and farmers by improving the long-term viability of both sectors.



Steve Hart

Vice President of Market Development -
Asia, Oceania, UK & EU



BANGLADESH

2

ZERO HUNGER



12

RESPONSIBLE CONSUMPTION AND PRODUCTION



14

LIFE BELOW WATER



Uplifting Bangladesh's Small-Scale Shrimp Farmers

The Global Seafood Alliance (GSA), has partnered with the Bangladesh Shrimp and Fish Foundation (BSFF) on a World Bank-funded project of the Bangladesh Department of Fisheries to uplift Bangladesh's small-scale shrimp farmers and revitalize black tiger shrimp (*Penaeus monodon*) farming.

Prior to 2003, black tiger shrimp dominated global shrimp production, but this role was eclipsed with the introduction of specific pathogen free (SPF) Pacific white shrimp (*Litopenaeus vannamei*) as a solution to white spot syndrome virus. By 2018, the white shrimp sector had rocketed to nearly 5 million metric tons — eight times the production of black tigers. Black tiger shrimp production has remained nearly flat and confined primarily to small-scale farms, where the species is cultured at very low density without supplemental feed.



Low-density black tiger shrimp have inherently high value due to their large size, natural pigmentation and low carbon footprint, but individual farms harvest small quantities, making it impractical for them to sell directly to processors. Instead, middlemen aggregate production from multiple farms and transport the collective harvest to processors, often with delayed delivery and compromised quality.

This project will facilitate the formation of clusters of small farms which will be enrolled into aquaculture improver programs that will progress to third-party certification to ensure compliance with international standards. Clusters will also increase the farms collective harvest volume and enable them to sell directly to processors. It will also encourage adoption of third-party certification to ensure compliance with international standards and strict product

quality grades to incentivize production of Grade A product. This approach will yield large, naturally pigmented black tiger shrimp with excellent quality, international certification and low carbon footprint. These unique attributes are expected to generate greater consumer confidence and satisfaction, premium prices in the international markets, attractive returns to small-scale farmers and sustainable development of the sector.

Subsequent steps will include improved farm productivity with high quality postlarvae produced from SPF broodstock, supplemental feeds from low-carbon-footprint ingredients and educational programs in collaboration with The Center for Responsible Seafood (TCRS). The successful implementation of this project is also expected to benefit small-scale black tiger shrimp farms in other producing countries and to help revitalize the black tiger shrimp market worldwide.



George Chamberlain

GSA President



After two years of virtual events, in-person GOAL returns this October

The 21st edition of the Global Seafood Alliance's signature event, GOAL: The Responsible Seafood Conference, will be held at the Fairmont Olympic Hotel in Seattle, USA, from Oct. 3 to 6, 2022.

As of July, GOAL 2022 in Seattle entered the late stages of development. GOAL 2023 in Saint John is in the early stages of development. Development for GOAL 2024 in Scotland will commence Q4 of 2022.



GOAL is a pre-competitive activity, bringing together like-minded individuals and organizations to address the major challenges and opportunities for both aquaculture and wild-capture fisheries. These issues go beyond what any one individual or organization can address alone. By bringing together individuals and organizations in such a manner, we contribute to our mission of advancing responsible seafood practices through education, advocacy and third-party assurances.

GOAL is the largest international seafood business conference of its kind, drawing upward of 500 thought leaders to a different country each year. GOAL is a platform for knowledge sharing and collaboration amongst industry, NGOs, academia, government, retail and foodservice. The delegation is a unique blend of professionals representing both farmed and wild seafood, united by an ever-evolving, forward-thinking conference program that identifies emerging challenges and offers solutions.

No two GOAL events are the same. The in-person event has been held in 18 cities on four continents (Asia, Europe, North America and South America) since the inaugural Global Shrimp Outlook for Leadership in 2001. Each GOAL embraces the identity and culture of the host country while providing an entertaining, casual atmosphere for seafood professionals to network and socialize through offsite receptions and dinners as well as tours of production facilities.



Steven Hedlund

Manager of Communications & Events



12 RESPONSIBLE CONSUMPTION AND PRODUCTION

MarinTrust, GSA to collaborate on marine ingredients certification, digitalization, assurance

The Global Seafood Alliance (GSA) and MarinTrust have signed a memorandum of understanding whereby the two organizations will work together to meet the goal of 75 percent of the world's marine ingredients supplies being either certified, in assessment, in application or in the MarinTrust Improver Programme by 2025.

Both GSA and MarinTrust are standards holders. MarinTrust is the world's leading certification program for the marine ingredient value chain, owning the MarinTrust Standard for Responsible Supply, MarinTrust Chain of Custody for Responsible Supply and MarinTrust Improver Programme.

Inked at the East India Club in London on Nov. 2, the MoU formalizes a long-standing relationship between GSA and MarinTrust and directly benefits the global seafood value chain by providing end-to-end assurances through third-party auditing and certification.



Pictured from left to right are Francisco Aldon of MarinTrust and Dan Lee of GSA. (Photo courtesy of Melanie Siggs.)

To meet the goal of 75 percent of the world's marine ingredients supplies being either certified, in assessment, in application or in the MarinTrust Improver Programme by 2025, GSA and MarinTrust have identified seven areas of collaboration. These areas include:

- GSA has agreed to contribute to the development and expansion of the MarinTrust multispecies criteria, which is designed to enable the assessment of highly complex fisheries in which multiple species are caught at the same time. There is currently one fishery improvement project (FIP), the

Gulf of Thailand mixed-trawl fishery, that has been accepted into the Improver Programme as part of the multispecies pilot project.

- GSA has agreed to continue to provide representation on the MarinTrust Governing Body Committee, Standards Steering Committee and Social and Ethical Committee, while MarinTrust has agreed to provide representation on the GSA Feed Mill Standard Technical Group.

- GSA and MarinTrust have agreed to collaborate on the development and implementation of a digital system to allow interoperability between both organizations.



Dan Lee

Standards Coordinator/Program Integrity Advisor



COLOMBIA

8

DECENT WORK AND
ECONOMIC GROWTH

12

RESPONSIBLE
CONSUMPTION
AND PRODUCTION

13

CLIMATE
ACTION

14

LIFE
BELOW WATER

How BAP standards gave Lake Betania a new lease on life

Over the last few decades, Lake Betania in southern Colombia has become an incredibly productive area for tilapia farming – more than 40 percent of tilapia consumed in the country comes from this area.



With this rapid growth, there was a lack of governance and order among the smaller tilapia producers. Taking advantage of the limited regulations with regards to waste and responsible operating, the lake became polluted. The impact was felt when two high-mortality events occurred, which then drove local authorities to take action.

The Global Seafood Alliance's Best Aquaculture Practices (BAP) certification program was taken up as the primary standard to empower Betania producers to improve with respect to responsible aquaculture production. The area has seen massive improvements of water quality as a result.



In addition to establishing the BAP program, seeding, harvesting and production protocols were implemented for all aquaculture production in the lake. Environmental authorities issued a maximum quantity of seeding and a maximum amount of biomass in the lake to prevent further pollution.

After implementing BAP standards in the Lake Betania region, the GSA market development team began initiatives to add new facilities and partners in Betania and in other regions of Colombia (Central and Northern Areas in Colombia). This includes clusters, groups and single-farm certification schemes, which are very well known in the area, and are being applied to foster a sense of continuous improvement.



Carlos Ramirez

Country Coordinator - Latin America



GSA Partners with Envisible to Digitize Seafood Assurances

The Global Seafood Alliance (GSA) has partnered with Envisible, a company specializing in sustainable sourcing and traceability technology, to digitize GSA's operations in a multi-year partnership that will leverage supply chain information for Best Aquaculture Practices (BAP) and Best Seafood Practices (BSP) stakeholders across the globe. This initiative will enable GSA partners and endorsers to visualize non-identifiable data shared from stakeholders throughout certified supply chains.

The GSA-Envisible partnership coincides with a rise in demand for seafood traceability among brands and consumers as well as increased regulatory requirements. These include the Seafood Import Monitoring Program and the U.S. Food and Drug Administration's Rule 204 of the Food Safety Modernization Act for higher-risk food categories such as seafood and leafy greens. As a number of traceability solutions emerge on the market, GSA and Envisible's work will enable GSA's marketplace partners and certified producers to share supply chain data irrespective of the traceability system they use in order to enhance and verify compliance with the BAP and BSP certification standards.

"The entire food system is in the midst of a transformation to become more data driven by an order of magnitude relative to how it exists today," said Jayson Berryhill, co-founder of Envisible. "This transformation is the result of a convergence of greater technological capabilities, the imperative for brands to be more efficient and sustainable, and the desire from consumers to know more about their food. The Global Seafood Alliance is positioning itself to be a leader in this transformation by developing foundational data tools for its partners and endorsers. At Envisible we are proud and honored to be partnering with GSA to make these new innovations possible."



GSA and Envisible initially announced their partnership during the GSA Stakeholder Update at Seafood Expo North America in Boston. "Our partnership with Envisible and the digitization of seafood assurances is the next big step in providing greater value to our partners and endorsers by leveraging supply chain information and further strengthening our BAP and BSP certification programs," said GSA CEO Brian Perkins. "We're becoming a more data driven organization, and Envisible is helping us get there."

Over the past two years, GSA and Envisible have engaged in multiple collaborations, along with other GSA partners, including a pilot to demonstrate real-time data sharing as products and their corresponding traceability data traveled from each of the primary stakeholders in BAP four-star certification: hatchery, feed mill, farm and processing plant. GSA and Envisible have also collaborated on other data sharing and innovation projects, including mapping BAP key data elements with those of the Global Dialogue on Seafood Traceability, and a satellite observation program in collaboration with satellite monitoring company Sea Warden.



Mike Kocsis

Chief Systems Officer

The Global Seafood Alliance (GSA) is an international nongovernmental organization dedicated to advancing responsible seafood practices through education, advocacy and third-party assurances.



Global Seafood Alliance
85 New Hampshire Avenue, Suite 200
Portsmouth, NH 03801 USA

globalseafood.org
info@globalseafood.org
1-603-317-5000