

Sustainable Seafood Toolkit



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Sustainable Seafood Toolkit

A Guide for Retailers

Produced for:
Food Marketing Institute (FMI)

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Disclaimer: This toolkit is for retailers who believe there is need for sustainable seafood products in their stores and want tools and resources to help them discern which products are in fact more sustainable. One note of caution: this toolkit DOES NOT recommend that buyers and category managers source more sustainable products. That decision should be based on the individual retailer's sustainability priorities and procurement strategies. We have tried to offer balanced information, not favoring one approach to seafood sustainability over another. The inclusion of company or organization examples in this publication is intended strictly for learning purposes and does not constitute an endorsement of the individuals, organizations or companies. Further, when a company program or organization is highlighted, we are not promoting their products or services but rather providing an example of the process they use to increase or improve sustainability in the value chain. Resources are listed alphabetically.

Published: May 2012

ACKNOWLEDGEMENTS

The Food Marketing Institute (FMI) would like to thank Bumble Bee Foods, LLC for their support for these training materials. In addition, FMI would like to thank the Sustainable Seafood Committee (formerly the Sustainable Seafood Working Group) for their support and input. Specifically, the authors are grateful to Rich Castle (Giant Eagle), Phil Gibson (Safeway), Bea James (Lunds and Byerly's), Howard Johnson (H.M. Johnson & Associates), Gerald "Jerry" Knecht (North Atlantic, Inc.), Mike Kraft (Bumble Bee), Chris Lischewski (Bumble Bee), Mike Loftus (Raley's), David Long (Kroger), Dawn Martin (SeaWeb), Shawn McMurter (Sobeys), George Parmenter (Delhaize America), Guy Pizzuti (Publix), Michael Smith (Hy-Vee), Rex Stewart (New Leaf Community Markets), Tania Taranovski (New England Aquarium), Tracy Taylor (Ahold USA), Paul Uys (Loblaw Companies Limited), Denise Webster (Fresh & Easy) and Jeanne von Zastrow (FMI) for their guidance and perspective in the development of these materials.

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Food Marketing Institute (FMI) conducts programs in public affairs, food safety, research, education and industry relations on behalf of its 1,500 member companies — food retailers and wholesalers — in the United States and around the world. FMI's U.S. members operate approximately 26,000 retail food stores and 14,000 pharmacies. Their combined annual sales volume of \$680 billion represents three-quarters of all retail food store sales in the United States. FMI's retail membership is composed of large multi-store chains, regional firms and independent supermarkets. Its international membership includes 200 companies from more than 50 countries. FMI's associate members include the supplier partners of its retail and wholesale members.

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Forward

Despite the 2008-2010 financial crises in the U.S., the continuing global economic malaise, and competing priorities of many retailers, industry leaders remain keenly aware of the tactical and reputational implications of seafood sustainability.

“One of the keystones of FMI’s Sustainability Initiative is sustainable seafood sourcing. This is the direct result of a 2009 FMI Board of Directors Policy encouraging the retail food industry to work with its suppliers, fishermen, government and NGOs to transition supply chains to verifiably and responsibly sourced seafood products. We appreciate the commitment and hard work of the 22 retailer companies engaged in moving our industry forward faster with sustainable seafood policies and actions. FMI is proud to share this toolkit as our gift to the industry”

- Jeanne von Zastrow
Senior Director, Sustainability and Industry Relations
Food Marketing Institute (FMI)

“The Sustainable Seafood Committee consists of a fantastic group of retailers — people who are passionate about seafood sustainability. This toolkit was created with the help of 14 of our members, two NGOs that our group has worked closely with, and two suppliers that have been very supportive of our group’s work. This is a great resource for companies that are just starting down this path or are looking for ideas on certain aspects with respect to seafood sustainability. We are proud of this toolkit that has been put together on behalf of the Sustainable Seafood Committee and hope others find this useful as well.”

- Tracy Taylor
Chair, FMI Sustainable Seafood Committee
Procurement Manager, Seafood
Ahold USA

“Sustainability is not an option; it is essential to doing business in the seafood industry—whether fishing, processing or retailing. It is our responsibility to ensure that the seafood we provide to our consumers is sourced from stocks that are harvested and managed in a manner that not only meets today’s needs but, equally importantly, ensures a healthy supply for future generations. Without responsible fisheries management, those of us who depend on the seafood industry have no future.”

- Chris Lischewski
President and Chief Executive Officer
Bumble Bee Foods, LLC



Purpose of Document

The purpose of this document is to assist food retailers with the integration and implementation of seafood sustainability procurement policies and procedures. This manual is based on meetings and discussions with members of the Sustainable Seafood Committee (SSC); interviews with industry leaders, and a review of current seafood sustainability guidelines and best practices.

Learning Objectives

This publication will be used to share key insights and to highlight and demonstrate leading retailers' actions around developing a sustainable seafood program, including:

- Making the business case to executive management
- Initiating an assessment of the seafood category
- Developing guidelines to create seafood sustainability programs
- Connecting with industry peers
- Partnering with seafood suppliers
- Partnering with non-governmental organizations (NGOs)
- Engaging and enlisting the support of store associates
- Communicating with customers

The toolkit will also feature an updated list of experts, certification and auditing bodies, government agencies, NGOs and other resources tailored to retailers.

Executive Summary

Sustainable seafood is increasingly recognized as a key component of corporate responsibility. More and more food retailers are advertising their commitment to sustainable seafood. They are working within their traditional value chains, through subsidiaries and suppliers and with non-traditional allies including non-governmental organizations (NGOs), scientists, and government agencies.

Members of the Food Marketing Institute (FMI) Sustainable Seafood Committee (SSC) are demonstrating leadership by applying the principles of the “Common Vision” in their seafood procurement policies and procedures. As a result, most have followed a similar path towards the development and implementation of their sustainable seafood programs. This journey usually included:

1. Commitment - Creating a public corporate policy on sustainable seafood
2. Data Collection - Collecting detailed data on seafood products
3. Procurement - Making changes in buying practices
4. Transparency - Being transparent about actions taken
5. Education - Educating customers and key stakeholders along the seafood supply chain
6. Reform - Engaging in policy and/or fishery management reform

Developing policies for sustainable seafood that address all of the issues facing wild-caught and farm-raised seafood products remains a daunting challenge for many retailers. To navigate this complex terrain, this toolkit offers key lessons learned and a few practical steps that food retailers can take toward progress.

The actions of the Sustainable Seafood Committee (formerly the Sustainable Seafood Working Group) serve as a guide to extend seafood sustainability models to large, small and medium-sized retailers. Retailers’ thoughts when asked about the strengths, weaknesses, opportunities, and threats they identified throughout their engagement or activities with sustainable seafood include the following:

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • Collaboration with stakeholders • Industry momentum around sustainable seafood • Improved management of fisheries and farms • Commitments from retailers driving change 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Proliferation of eco-labels • Traceability gaps • Consumer confusion • Complexity of the topic • Subjective interpretation of science • Conflicts among stakeholders
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Build trusting relationships with stakeholders • Brand differentiation • Risk mitigation • Professional development/environmental education 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • Population growth leads to increased demand for seafood • Misinformation • Financial uncertainty • Stock depletion • Customer distrust

The Sustainable Seafood Movement

Many would agree that the sustainable seafood movement became more visible to the general public in 1996 when Unilever—one of the world's largest consumer goods companies, and the World Wildlife Fund (WWF)—one of the world's largest conservation organizations, began discussing how to assure the long-term sustainability of global fish stocks and the integrity of the marine ecosystem.

These talks led to the creation of the Marine Stewardship Council (MSC), the world's first seafood eco-label provider. Three years later, the first MSC certified fishery was announced. In 1999 the Monterey Bay Aquarium distributed the first version of the Seafood Watch wallet card for consumers, identifying good and bad seafood choices based on their environmental criteria. The driver behind these efforts was the knowledge that long-term health and viability of the ocean ecosystem depends squarely on the sustainability of fisheries and aquaculture.

For almost twenty years these groups have been working to influence the seafood value chain – from fishermen and fish farmers to processors, distributors, retailers, restaurants, and food service providers – to make the seafood marketplace environmentally and economically sustainable.

Some milestones in the history of the sustainable seafood movement include:

1995

Development of United Nations Food & Agricultural Organization (FAO) Code of Conduct for Responsible Fisheries

1996

Unilever and World Wildlife Fund create Marine Stewardship Council

1999

Western Australia Rock Lobster receives first MSC certification as sustainable fishery and Monterey Bay Aquarium launches the Seafood Watch Program

2002

SeaWeb's first Seafood Summit was held in Washington, DC

2004

IntraFish Media issues report proclaiming the sustainable seafood movement “mainstream”

2007

Global Aquaculture Alliance expands best aquaculture practices

2008

Coalition of non-governmental organizations (NGOs) launches Common Vision and Greenpeace releases its first ranking of U.S. retailers' actions on sustainable seafood entitled Carting Away the Oceans

2009

Food Marketing Institute (FMI) launches the Sustainable Seafood Working Group (Now called the Sustainable Seafood Committee)

2010

WWF and IDH launch the Aquaculture Stewardship Council (ASC)

Today, many groups are working to connect multiple stakeholders to new solutions for sustainable seafood. The conservation community, regulatory bodies, and seafood industry, though adversarial at times, are actively engaging in new and different ways to reshape the future of fishing and fish farming and to build a large and diverse market for more ocean-friendly seafood.

What is Sustainable Seafood?

“Sustainable or environmentally responsible” seafood can be defined as fish and shellfish that are raised or harvested in a manner that protects not only the target seafood species but also the ecosystem, so that future generations can have access to the resource we currently enjoy.

Some of the key issues that help to evaluate whether a fishery is sustainable include:

1. How abundant a species of fish is
2. How many fish are being caught
3. What other types of animals are caught with the fish
4. Whether endangered species are harmed
5. What effects the fishing gear has on ocean habitats
6. The extent to which fishery management agencies adhere to science and data to manage their fisheries

Some of the key issues used to evaluate fish farming include:

1. The type of system used to farm the fish
2. Whether the farms release pollution into the surrounding environment
3. What types of chemicals are used
4. The amount of wild fish that are used as feed
5. Whether the farmed species is native to where it is raised

What is Sustainable Sourcing?

Ensuring the continuity of the seafood supply is a core business issue. Retailers can help mitigate threats to biodiversity by choosing or sourcing sustainable species and knowing how and where each was caught or raised, taking into account the following potential issues:

- Wild-Caught
 - Health of fish (or shellfish) population and fishing level (stock assessments)
 - Fishing methods and gear types
 - Quality of fishery management

- Farm-Raised
 - Pollution
 - Threat to wild populations
 - Fishmeal or fish oil used in feed

Sustainable sourcing practices enable producers, processors and suppliers to consistently deliver seafood products while protecting and improving the natural environment and livelihoods of local communities. Additionally, investing directly in on-the-ground training and development while participating in Fishery Improvement Projects (FIPs), Aquaculture Improvement Projects (AIPs) and other improvement efforts can help fishing communities improve how they manage their resources, increasing both yield and quality of the fish stock over time.

The U.S. Seafood Market

According to NOAA's National Marine Fisheries Service, in 2010 Americans consumed 15.8 pounds of seafood per person, down 0.2 pounds per person from 2009. U.S. consumers spent an estimated \$80.2 billion on fishery products in 2010, including \$54 billion at restaurants, carry-outs, and caterers; \$25.8 billion in retail sales for at-home consumption, and \$432 million for industrial fish products.

Aquaculture (fish or shellfish farming) is one of the fastest growing forms of food production in the world. Nearly half of the seafood consumed around the world is farm-raised. The United States is a major consumer of aquaculture products, importing over 80 percent of the seafood consumed, with half of that from aquaculture.

In 2010 imports made up 86 percent of all seafood consumed in the United States. Primarily, the U.S. imports from China, Thailand, Canada, Indonesia, Vietnam, and Ecuador. The top species imported (by volume) include shrimp, freshwater fish, tuna, salmon, groundfish (e.g., sole, flounder, and halibut), crabs, and squid. The United States imported about 5.5 billion pounds of seafood in 2010, an increase of 294.8 million pounds from 2009. 2010 imports were valued at \$14.8 billion, \$1.7 billion more than 2009.

Getting Started on Sustainable Seafood

Today's leading organizations recognize that sustainability is an essential aspect of their business strategies. By looking beyond their walls to the opportunities presented by dynamic industry partners, companies and agencies can develop a sustainability strategy that enhances revenue and brand value, promotes innovation, reduces costs and manages risk.

In 2011 NOAA testified before the United States Congress about the status of the 528 individual stocks and stock complexes that are currently managed within 46 federal fishery management plans nationwide. Of the 253 stocks or stock complexes for which an overfishing (i.e., the rate of removal from a stock is too high) determination could be made, 213 (84%) are not subject to overfishing and 40 (16%) are subject to overfishing. Also, of the 207 stocks or stock complexes for which an overfished (i.e., the population is too low or below a prescribed threshold) determination could be made, 159 (77%) are not overfished and 48 (23%) are overfished.

The U.S. seafood industry must be socially and environmentally sustainable to be profitable over the long term, particularly in the face of rising dinner-table demand and record-level U.S. seafood imports. There are structural and economic traits of fisheries and the fish farming industry that must be addressed to avoid unsustainable business practices. The seafood industry is already experiencing the consequences of unsustainable actions in the form of depletion of wild-fish stocks, regional biological collapses in fish farming, and entrenched conflicts with stakeholders. Those fisheries that are well managed by competent agencies using data and science provide solid examples and show that long term sustainability of aquatic resources is indeed possible.

The negative consequences of mismanagement not only affect the environment and confidence of local communities, but also reduce profitability and limit growth opportunities over the longer term. Where fish farming and wild-catch industries are fragmented, the need for collective action may become apparent. By leveraging their purchasing power, food retailers can play an important role in seafood sustainability.

Key steps retailers can take include:

- Developing and implementing a comprehensive policy on sustainable seafood.
- Assessing and monitoring the environmental impact of their seafood products.
- Supporting environmentally responsible fisheries and aquaculture producers through purchasing decisions. This can include working directly with suppliers to improve their production methods.
- Making information regarding seafood products publicly available.
- Educating customers, suppliers, employees and other key stakeholders about environmentally responsible seafood.
- Engaging in and supporting policy and management reforms that lead to positive environmental outcomes in aquaculture and fisheries management.

The Case for Sustainable Seafood

Businesses today are accountable to multiple stakeholder groups each with their own list of priorities and expectations. Stakeholder groups can include local communities, consumer organizations, corporate customers, corporate suppliers, financial institutions, the media, NGOs, government regulators, and unions.

In recent years, the NGO community has placed a spotlight on the importance of sustainability for the seafood industry by seeking to increase consumer awareness of ocean issues. This increased awareness among consumers creates new challenges for food retailers, but also provides many opportunities to increase the growth of the seafood department.

Though it is important to communicate financial benefits to senior executives, calculating the return on investment (ROI) of seafood sustainability programs may require a different kind of budget approach: one that takes into account the reputational costs of inaction. In this way maximizing the public relations benefits of environmentally responsible seafood by responding to rising consumer concerns will be understood as a necessary investment in the long-term viability and competitive positioning of the company.

Food retailers can play a powerful role in supporting sustainable fisheries and aquaculture operations by sourcing and selling seafood products that are caught or raised in an environmentally responsible manner. These efforts will not only benefit the health of the oceans, but can also provide new opportunities to communicate an ongoing commitment to environmental conservation.

Read on to learn how New Leaf Community Markets built the case for sustainable seafood.

The Pioneers at New Leaf Build their Case

In 2002, Teresa Ish and Shelly Benoit, two graduate students in the Department of Ocean Sciences at the University of California, Santa Cruz, approached New Leaf Community Markets (New Leaf) and asked the independent grocer to run a pilot program focused on sustainable seafood. These women shared fisheries data with store executives and explained that over 70 percent of the world's fish stocks were fully exploited or overfished and that catches were declining. They added that billions of pounds of non-target fish were wasted and discarded each year as unwanted "bycatch," and that hundreds of thousands of seabirds, marine mammals, sea turtles, and other marine life were often killed through destructive fishing practices.

Armed with this information, New Leaf agreed to participate in the project. New Leaf demonstrated a strong commitment to marine conservation before most other companies even started recognizing how seafood consumption was affecting the oceans. The project involved labeling each item in the retailer's seafood case. The color-coded system consisted of green, yellow and red. Green signs indicated "best choices" (abundant, well-

managed, and caught or farmed in environmentally friendly ways), yellow signs indicated “good alternatives” (still having concerns regarding how they are caught or farmed), and red signs indicated products deemed “unsustainable” by the scientists at Monterey Bay Aquarium (overfished, or caught or farmed in ways that harm other marine life or the environment).

A Guide to New Leaf's Sustainable Seafood Signage

Our seafood signs are color-coded for sustainability and marked with the catch or farming method as well as the country of origin.

GREEN

SUSTAINABLE Fish caught or farmed in an ocean friendly manner with minimal impact on the ecosystem.

YELLOW

SOME CONCERNS Population of these species may be healthy, but there may be some impact on the ecosystem, or poor management of the fishery or farm.

Source: www.newleaf.com

New Leaf worked with Ish and Benoit to identify and switch to environmentally preferable seafood products or sources that were also competitive in cost, quality, and availability. They also collaborated to develop messages informing customers about the overexploitation of fisheries and the environmental, economic, and quality benefits of more sustainable seafood products.

According to Rex Stewart, co-owner of New Leaf Community Markets, “I did not want to meet with Teresa and Shelly at first, but I am glad that I did. Our partnership with them has been a successful one and much of the credit for that goes to our customers. During the first three months of the project there was a small drop in seafood sales (approximately 10 percent). However, shortly after that we received great publicity in the local newspapers. The local media began to share our story and sales started to pick-up. We doubled the sales in the seafood category in that first year.”

New Leaf Community Markets continues to be a leader in sustainable seafood by offering only “best choice” (green) and “good alternative” (yellow) ranked seafood in their cases. Within the sales of green and yellow ranked seafood products, New Leaf has increased the proportion of green products in their cases from 31 to 46 percent of the case in June of 2008, to 39 to 55 percent of the case in June of 2009, an example of their ongoing commitment to sourcing more “best choice” products.

“FishWise is the organization that grew out of the partnership between Teresa Ish and Shelly Benoit, and New Leaf Community Markets. They began with one client [New Leaf] and have continued to add new partners to their retail program, which is a testament to the viability of their concept and the science behind it,” said Stewart.

Evaluating the Seafood Category

Two critical questions drive the sustainable seafood issue:

- 1) Where does the fish come from?
- 2) What was the capture or harvest method?

Food retailers should not assume that fish comes from one standard location. Often the origin of a specific species can vary throughout the year. It is important to check invoices, records, and shipping documents from suppliers to review and track the origin of products, and to maintain a verifiable recordkeeping audit trail. Retailers should also ask to be notified of any changes in both origin and harvest of products.

Starter Questions for Seafood Suppliers

1. Wild-caught product:
 - a. What is the species (all names that it may be traded under and Latin name)?
 - b. Where was it caught?
 - c. How was it caught (What type of gear was used and are there by-catch concerns or habitat destruction concerns)?
 - d. Does the supplier participate in any third-party certification programs?
 - e. Is there a good fishery management plan in place?
 - f. What is the status of the fishery stock?
 - If the fishery is overfished or if there is overfishing occurring, is there an improvement plan in place or are there more sustainable substitutes?
2. Farm-raised product:
 - a. What is the species (common and Latin name)?
 - b. Where was it farmed?
 - c. How was it farmed (Open net pens or cages, ponds, raceways, recirculating systems, suspended ropes, etc.)?
 - d. How much fish does it take to grow one pound of the species in question and what are the sources of fish used to feed the species?
 - e. Are any antibiotics or other supplements used, and if so, are they administered under strict veterinary control with the appropriate withdrawal periods?
 - f. Does the supplier participate in any third-party certification programs?

Source: Sustainability on the Shelves: A Sourcing Guide for Category Managers & Buyers

Traceability is an important part of sustainable seafood practice, and can essentially be described as a record-keeping system designed to identify and track products from origin to consumption. The terms “product tracking” and “product tracing” have different meanings in the context of traceability. “Product tracking” refers to the recording of information as the product makes its way through the supply chain, and the ability to identify in real time where the product is and what processes it has undergone. “Product tracing” refers to the ability to follow a product back through these processes from the consumer to their origin.

The actual process of creating an informational link between the origin of seafood items and their processing and distribution can be extremely complicated, especially given the quantity of seafood that makes its way through the global marketplace.

Once the seafood's origin is confirmed, questions about stock status, fishery management, or the ecosystem impacts of harvest tend to arise. As seafood demand increases, so does the focus on traceability as it relates to sustainable practices.

Read on to learn how Publix Super Markets Inc., evaluated their seafood category.

Publix Emphasizes Sustainable Sourcing

Publix Super Markets Inc., (Publix) is an employee-owned supermarket chain with 1,034 stores located in Florida, Georgia, South Carolina, Alabama and Tennessee. In 2008, Publix added sustainability as a key objective in their corporate strategy map, requiring each business unit to measure its sustainable performance against specific metrics and goals. However, the supermarket chain's commitment to sustainable practices started well before 2008 and covered a broad range of initiatives, including energy and fuel reduction, recycling vast amounts of material, and promoting environmental responsibility to customers, associates and suppliers.

As a result of the chain's new corporate initiative, Publix intensified its focus on seafood sourcing efforts to provide customers with high quality products and wide variety while being good stewards of the environment. All Publix seafood buyers work hard to ensure that their seafood comes from legal fisheries, and it is sourced domestically whenever possible.

Publix worked alongside several non-governmental organizations (NGOs), which provided them with knowledge, guidance and expertise on the complex issues of seafood sustainability. Three environmental groups — the Ocean Trust, Ocean Conservancy and the Sustainable Fisheries Partnership (SFP) — helped the chain to measure progress and make informed decisions. Publix also worked with seafood suppliers to identify sustainable products.

In an effort to communicate the new company direction and commitment to seafood sustainability, Publix hosted a Seafood Sustainability Summit in May of 2009 for their 70 seafood suppliers. During this meeting Publix leadership shared the company's message on the importance of working toward improved seafood sustainability, introduced their environmental partners, and shared their plans for improvement, which included new sustainability expectations of all suppliers. As a follow-up to the meeting, each supplier was asked to participate in an assessment of Publix's seafood category by completing a questionnaire about the seafood products they sold to the chain (see Figure 1).

Developing a Sustainable Seafood Policy

Certification and eco-labels such as Marine Stewardship Council (MSC) for wild seafood, Aquaculture Stewardship Council (ASC) and Best Aquaculture Practices (BAP) for farmed seafood can help to ensure or verify the sustainability of a seafood product. However, only a small fraction of seafood across the globe has been certified.

The criteria set forth by eco-labels can serve as the template for helping all fisheries and farms to improve, regardless of whether they are approaching certification or far away from it. To go beyond certification, some food retailers have partnered with NGOs to create sustainable seafood programs to deal with the most critical issues in the most over-exploited fisheries.

A basic sustainable seafood program can be divided into four key steps:

Step 1 — Definition of the organization's goals and objectives

Step 2 — Research and data collection to determine baseline

Step 3 — Product evaluation, product decisions and improvement projects

Step 4 — Continuous improvement projects and measurement of progress

Step 1 Define the goals and objectives endorsed by the organization's executive management team.

Step 2 Conduct thorough research and data collection for every product sold in the seafood department to understand the opportunities and potential challenges of implementing a new sourcing policy.

Step 3 Design an evaluation process examining primary areas that impact sustainability, for example, fishery management, stock status and environmental impact for wild-caught species, or pollution, threat to wild populations, and fishmeal or fish oil used in feed for farm-raised species. This process will generate the information needed to decide whether to sell a product, help improve a fishery or farm through an improvement project, or discontinue selling a product until issues are resolved.

Step 4 Implement improvement projects and measure progress or impact. Track the availability and sales of sustainable products to measure progress as improvement projects lead to more sustainable seafood options for customers.

Read on to learn how Ahold USA developed a sustainable seafood policy.

Ahold USA Sets Seafood Policy

Ahold USA (Ahold) has an ongoing sustainable seafood program partnership with the New England Aquarium (the Aquarium), and has emerged as one of the leaders in protecting fisheries from becoming depleted. In 2000, Ahold USA initially partnered with

the New England Aquarium to help assess the sustainability of seafood sources and identify alternative sources with better levels of sustainability. Today, in addition to helping to educate consumers about seafood sustainability, the Aquarium also supports Ahold's mission to help suppliers to improve their performance.

In 2008 Ahold implemented a group-wide seafood sustainability policy. The policy includes 10 rules for the sourcing and sale of seafood, and an assessment tool to measure supplier performance (see Figure 2). The 10-point policy dictates how seafood should be purchased and sold based on social, ecological, and economic considerations. Based on the New England Aquarium's recommendations, Ahold USA's divisions (Giant-Carlisle, Giant-Landover, Stop & Shop New England and Stop & Shop New York Metro) discontinued the sale of shark, Chilean sea bass and orange roughy and a number of other species until issues regarding the sustainability of these species have been addressed. They have also shifted some products to more sustainable sources and are actively engaging their supply chain on improvement efforts.

Ahold's goals for delivering sustainable seafood to customers are to:

- Promote the sale of seafood that is produced or harvested in a sustainable way;
- Avoid the sale of species that have been over-fished; and to
- Actively work with the industry, NGOs and governments to monitor and improve long-term viability of fish stocks.

Royal Ahold's European-based grocers – Albert Heijn, Albert, Hypernova and ICA – also have seafood sustainability commitments. These companies work with the WWF in order to increase supply of sustainable products from Marine Stewardship Council (MSC) certified fisheries, Aquaculture Stewardship Council (ASC) certified farms or other FAO compliant certification programs. In particular, Albert Heijn's and ICA's partnerships with the WWF have helped to increase public awareness of the issue of sustainable seafood in the Netherlands and Scandinavia.

Ahold USA seeks to continually improve their assortment by including more sustainable seafood products, working with current resources to improve sustainability, and removing varieties of seafood deemed to be in serious jeopardy of becoming over-fished. As an international group of supermarket companies, Ahold knows how important it is that the seafood they sell comes from sustainable sources. Therefore, Royal Ahold has set a company-wide target for 2015 to sell only sustainable seafood certified against a seafood eco-label program deemed compliant with the FAO Guidelines for Fisheries and Aquaculture Eco-labeling.

“We realized that we needed to better understand where we stand with our full seafood effort in order to make more of a positive impact,” said Tracy Taylor, Ahold USA's Procurement Manager of Frozen Seafood. “We want to continue to offer the variety of seafood choices that our customers want to purchase but in order to do that, we need to work with our vendor partners in the seafood industry to encourage sustainable fishing and aquaculture practices. The design and implementation steps were particularly challenging and we could not have done it without our NGO partner.”

Figure 2.

Stop & Shop's Ten Point Sustainable Seafood Policy

- 1. Never knowingly buy illegal seafood**
 - We work with reputable suppliers who only purchase product for us with the appropriate legal paperwork.
 - We are looking into traceability systems, which will make it even more difficult to buy or sell illegally caught product
- 2. Purchase and sales (or prohibition of sales) decisions are based on social, ecological, and economic considerations**
 - We are working on social audits with our private label vendors located in high risk countries (areas where social labor issues are known to occur)
 - We made the decision to discontinue Chilean sea bass, orange roughy, and all sharks due to these fisheries being in severe trouble
- 3. Suppliers are selected and monitored based on demonstration of continuous improvement in the sustainability of their operations**
 - We only work with suppliers who are working on improving the sustainability of the items they offer us and have stopped doing business with a few vendors over the past year who we felt were not moving in the right direction
- 4. Seafood will be labeled with the legally required information**
 - All of our seafood is labeled with the appropriate information as required by law, including Country of Origin and whether it was farmed or harvested from the wild
- 5. Sustainable seafood will be actively promoted**
 - We will continue to actively promote items such as Pacific long-line-caught cod, Arctic char, and tilapia that come from well managed fisheries and farms.
 - We are looking at other well-managed species to possibly add to our assortment
- 6. We are engaged in activities with other stakeholders to improve the sustainability of the seafood produced**
 - We have partnered with the New England Aquarium since 2000 to assist us in improving the sustainability of our seafood offerings
 - The New England Aquarium is working with some of our key suppliers to improve the sustainability of the products they offer us
 - In 2008, we publicly declared our support of the Common Vision for Environmentally Sustainable Seafood (www.solutionsforseafood.org).
- 7. Scientific research linked to the sustainable production of seafood is needed and supported**
 - The New England Aquarium provides us with science-based research to assist us in improving the sustainability of our seafood assortment
- 8. To ensure product integrity, the implementation of traceability systems is of crucial importance**
 - We are looking into traceability systems to assist us with better tracking product throughout the supply chain
 - We only work with vendors that have the appropriate traceability processes in place as required by law
- 9. We do not do business with suppliers who cannot fulfill their ethical and/or sustainability responsibilities**
 - This has always been at the core of our business
- 10. Communicate to consumers, associates, and shareholders about efforts to improve seafood sustainability**
 - Our website provides information regarding our partnership with the New England Aquarium; new information and updates will be added in the future
 - Our associates learn about our work with the New England Aquarium through the company's intranet and through various training efforts
 - Our company puts out a Corporate Responsibility report every year that provides updated information on our efforts to improve seafood sustainability

Source: www.ahold.com

Connecting with Peers

In August 2008, the Food Marketing Institute (FMI) announced the launch of the Sustainable Seafood Working Group (SSWG). Now called the Sustainable Seafood Committee (SSC), their mission is to identify key issues surrounding sustainable seafood and to find ways to cut through this confusing, complicated and complex subject by developing industry guidelines, tools and resources to help retailers, suppliers, consumers and NGOs work together for solutions. FMI promotes and facilitates peer-to-peer relationships and recognizes the critical role they play in connecting businesses with the resources and information they need to grow.

FMI's Sustainable Seafood Committee (SSC) paves the way for building long-term relationships that can help food retailers succeed on sustainable seafood issues. The SSC seeks to help its members gain greater objectivity about complex business and sustainability issues, and offers useful advice without pressure. The SSC helps seafood buyers to accelerate on key seafood issues and achieve leadership growth by sharing their experiences, triumphs, and failures and by offering an "outside looking-in" perspective on challenges and opportunities they each face every day.

FMI member companies that currently participate in the SSC include:

Ahold USA	Price Chopper
Fresh and Easy	Supermarkets
Neighborhood Markets	Publix Super Markets
Giant Eagle	Raley's Family of Fine Stores
Delhaize USA	Safeway
Haggen	Schnucks Markets
Harris Teeter	Sobeys
H-E-B	Supervalu
Hy-Vee	Target Corp.
King Supermarkets	Wakefern Food Group
The Kroger Company	Wal-Mart Stores
Loblaw Companies Limited	Wegmans Food Markets
	Winn-Dixie Stores

Source: www.fmi.org

Read on to learn how Raley's Family of Fine Stores and The Kroger Company collaborated with their peers.

Raley's Collaborates for Industry-wide Change

In June of 2008, the environmental group Greenpeace released its first ranking of U.S. retailers around the issue of sustainable seafood entitled Carting Away the Oceans. Greenpeace evaluated the fish purchasing policies of U.S. supermarkets and ranked their attention to sustainability. The top food retail and wholesale companies in North America were featured in the publication and this caught the attention of the industry.

Raley's Family of Fine Stores (Raley's) is a privately owned supermarket chain with headquarters in West Sacramento, CA. The company is comprised of four chains — Raley's, Bel Air Markets, Nob Hill Foods and Food Source — located in Northern California and Nevada. Raley's was voted number one supermarket chain in the nation by readers of Consumer Reports magazine three consecutive times – in 1997, 2000 and 2003 – and in 2009 the chain ranked among the top four. With annual revenues of \$3 billion, Raley's is the eleventh largest privately-owned company in California, and was ranked number one in the Sacramento Business Journal's list of Corporate Philanthropy - Direct Giving for three consecutive years, 2008, 2009 and 2010.

Raley's was one of the first members of FMI's Sustainable Seafood Committee (SSC). The company joined the SSC to better understand how the food retail and wholesale industry could address concerns environmental groups like Greenpeace were raising about the sustainability of the seafood industry. The chain joined with twenty-two other leading retailers to work in partnership with non governmental organizations (NGOs), seafood suppliers, government agencies and accrediting bodies to move their own seafood procurement policies forward while developing case studies, guidelines and educational tools for the entire industry.

According to Mike Loftus, Director of Meat and Seafood at Raley's, "Partnering with the SSC has been very beneficial for Raley's. We have the opportunity to work in collaboration with key stakeholders, and we can collectively develop action plans for retailer best practices and policies that address seafood sustainability issues."

Raley's efforts on sustainability and with the SSC have gained the respect of the industry. In 2010 the chain won Progressive Grocer magazine's Green Grocer Award for their sustainability initiatives across stores in northern California and Nevada. The annual Green Grocer award recognizes those industry leaders dedicating themselves to social responsibility through green initiatives.



Source: www.progressivegrocer.com

"Raley's is an environmentally conscious retailer and we feel that we have an important responsibility to be exceptionally good stewards of our planet," said Loftus.

Kroger Shares Lessons Learned From the SSC

The Kroger Co. (Kroger) is also a founding member of FMI's Sustainable Seafood Committee. The chain operates over 2,400 grocery retail stores in 31 U.S. states under the names of Ralphs, King Soopers, Dillons, Fry's, City Market and others. In 2009, Kroger launched their sustainable seafood program with the expressed goal of sourcing 100 percent of their top 20 wild-caught species from fisheries that are MSC certified, in MSC full assessment, or engaged in a WWF fishery improvement project by the year 2015. In addition to participating in the SSC, the chain began partnerships with the World Wildlife Fund (WWF) and the Global Aquaculture Alliance (GAA) to help more quickly advance their internal seafood sustainability efforts. When asked what advice he would give other retailers just getting started on the path to seafood sustainability, David Long, Seafood Coordinator of Merchandising and Procurement for The Kroger Co. listed the following as his "Top Ten" lessons learned with the SSC:

Kroger's Top 10 Tips on Sustainable Seafood for Retailers

1) Think Globally

Set your seafood sustainability goals to international standards like the Code of Conduct for Responsible Fisheries developed by the Food and Agriculture Organization of the United Nations, which recognizes the nutritional, economic, social, environmental and cultural importance of fisheries and the interests of all those concerned with the global fishery sector.

2) Follow the Science

Work with third-party certifiers and NGOs who base their advice and standards on peer-reviewed science.

3) Partner with Stakeholders

The work to develop, implement and manage a sustainable seafood policy and program will require time and resources that you may not have internally.

4) Be Bold

Take a stand and make a public commitment to seafood sustainability.

5) Be Honest

Share the opportunities and challenges you face on the path to achieving your seafood sustainability goals with store associates and

customers. Communicate wins and losses honestly to avoid the pretense of perfection.

6) Engage Store Leadership

Keep store executives focused on the issue of sustainable seafood and its connection to the overall corporate strategy.

7) Engage Store Associates

Knowledgeable employees can help build trust with consumers by communicating your store's sustainability goals and activities through factual easy to understand information.

8) Connect with Customers

Connect sustainable seafood to the multiple priorities of customers and get them involved in being part of the solution.

9) Be Steadfast

The journey to a 100% sustainable seafood supply will not be easy, but lasting and positive change can be achieved over time.

10) Be Adaptable

The information around the status of specific seafood species, fisheries and aquaculture practices often change as sustainability issues get resolved and/or revisited.

Partnering with NGOs

Many retailers realize that staying up-to-date on all aspects of sustainable seafood could easily be a full time job. Few retailers have the internal resources to devote to that task, so many have increased collaboration with non-governmental organizations (NGOs) in support of their environmental and social initiatives.

Broadly speaking, collaboration between these groups stems from the recognition of shared mission and goals. This increased cooperation between retailers and NGOs is vital to improving access to fact-based information about key seafood issues and solutions.

Choosing an NGO partner who understands the demands of business and is willing to provide timely and relevant information, education and guidance is key to the success of these relationships. Many NGOs understand food retailers' internal business goals and approach to seafood and are willing to work with them to develop sourcing strategies that balance business needs with a sustainability policy.

The Food Marketing Institute's (FMI) Sustainable Seafood Committee (SSC) invited leading NGOs to advise them on the issues surrounding wild-caught and farm-raised seafood. The SSC sought reliable, responsible, respected NGO partners, with proven track records in collaborating with business. Members of the SSC NGO Advisory Group include:

- FishWise
- Living Oceans Society/David Suzuki Foundation
- New England Aquarium
- SeaWeb's Seafood Choices Alliance
- Sustainable Fisheries Partnership (SFP)
- World Wildlife Fund (WWF)

Read on to learn how Safeway, Inc., partnered with the NGO FishWise. Also, learn how the New England Aquarium works with the seafood industry to create change.

Safeway Partners for Success

In 2010, Safeway Inc., (Safeway) the Pleasanton, CA based retailer, joined forces with FishWise, a Santa Cruz, CA based nonprofit, to develop and implement a more comprehensive sustainable seafood policy. Safeway had worked on sustainable seafood for several years prior to the partnership, but due to the complexity surrounding key seafood issues, the retailer decided to seek an outside resource to design a program tailored to their needs.

Safeway operates 1,702 stores located mostly in the western, Midwestern, and mid-Atlantic regions of the US, as well as western Canada with a minority interest in 161 stores in Mexico. According to Phil Gibson, Group Director of Seafood at Safeway, "We

strive to be a leader in the area of seafood sustainability. This is no easy task for a company of our size, so Safeway chooses our partners carefully and continues to work collaboratively with non profit groups, certification bodies and government organizations alike. We realize that a lot remains to be done on sustainable seafood, so Safeway hopes that the entire food retail industry collaborates to help ensure healthy oceans and freshwater ecosystems for future generations.”

Safeway’s commitment to sustainable seafood included the ambitious goal of sourcing all of its fresh and frozen seafood from sustainable and traceable sources, or from those involved in credible improvement projects by the year 2015. A first step in the long-term commitment to improving the sustainability of their seafood assortment, the retailer agreed to discontinue the sale of grouper, Gulf red snapper and shark until these overfished stocks recover.

The partnership with FishWise was an integral part of the grocery store chain's plans to meet their commitment to environmentally responsible seafood management. Founded in 2002 to enable consumers and grocery retailers to support marine conservation through their seafood purchasing decisions, FishWise works to support environmentally responsible business practices by providing innovative market-based tools to companies throughout the seafood supply chain.

With assistance from FishWise, Safeway met with all of its suppliers to convey the chain’s commitment to sustainability, discuss recommendations to improve production practices, and explore ways to establish traceability for all products. Based on the results of the sourcing assessment, FishWise prioritized suppliers and products for environmental improvement plans which are being developed and implemented to help Safeway’s seafood procurement become more sustainable over time. Safeway also launched a traceability system to screen out suppliers of seafood products not meeting the company’s new sustainable seafood policy.

To raise customer awareness about the changes that were taking place in the seafood section, Safeway supplied all stores with a comprehensive brochure outlining its commitment, plans, and actions. FishWise helped the retailer in this instance by training staff on the company's sustainability policy and providing science-based information on sustainable seafood to Safeway customers.

Safeway’s partnership with FishWise led to a more sustainable product selection for customers as well as improved transparency with its suppliers. By working closely with FishWise, and building on its existing program, Safeway is leading the way on seafood sustainability. The company’s seafood program was showcased in the California Academy of Sciences’ "Science in Action" video exhibit, which highlighted innovative ways that retailers, researchers and environmental groups are harvesting seafood without jeopardizing ecosystems. Safeway was featured for its industry-leading seafood sourcing initiative. “As we move towards our 2015 goals, our customers will shop with more confidence knowing that our seafood products are both healthy for their families and environmentally responsible too,” said Gibson.



New England Aquarium uses the Common Vision

Founded in 2000, the sustainable seafood program of the New England Aquarium (the Aquarium) works to encourage the sustainable development of farmed and wild-caught seafood resources. The Aquarium advises major seafood buyers, including food retailers and seafood suppliers, on issues regarding environmentally responsible seafood to develop and implement pragmatic sourcing policies and practices. The Aquarium engages businesses throughout the supply chain and facilitates work with fishermen and fish farmers on improvement efforts to help ensure greater environmental accountability and achieve change on the water.

According to Tania Taranovski, Sustainable Seafood Programs Manager at New England Aquarium, “today the Aquarium works with several of the country’s largest seafood companies, including Ahold USA, Darden Restaurants, Gorton’s, Inc., and Sea Port Products, helping them to incorporate environmental criteria into their purchasing decisions, working with their supply chain on improvement efforts, and educating their employees and customers about environmentally smart seafood choices. To accomplish this, the Aquarium uses the Common Vision and customizes this six step program to meet the needs of our partners.”

The Common Vision for Environmentally Sustainable Seafood (Common Vision) identifies six critical areas where seafood companies can demonstrate environmental leadership and take action to ensure a sustainable seafood supply. Specific actions to meet and address these areas are outlined below.

1) Commitment

Creating a public corporate policy on sustainable seafood to:

- Establish a corporate philosophy and approach to achieving the Common Vision for Sustainable Seafood.
- Outline specific activities to address the critical areas of data collection, transparency, procurement, education and reform.
- Identify specific goals and targets to be achieved over set timelines in each area.

2) Data Collection

Collecting detailed data on seafood products including:

- Common and scientific names.
- Country of origin.

- The stock from which the seafood was caught or the farm from which it was cultivated.
- Fishing gears or aquaculture production methods used.
- Producers and/or processors.
- Volume of product purchased.
- Environmental responsibility ranking (i.e., how each product is ranked by leading conservation NGOs on environmental performance.)

3) Procurement

Making changes in buying practices to:

- Preferentially sell environmentally responsible seafood which address local, regional, and global concerns regarding environmental performance.
- Stop selling seafood products with serious ongoing environmental impacts.
- If purchasing less sustainable seafood, source from operators that are willing to work proactively to improve the environmental performance of fisheries or farms and can demonstrate significant progress in fixing problems by meeting clear milestones and deadlines for improvement.
- Phase out fisheries, producers, and suppliers that refuse to improve their environmental performance.

4) Transparency

Being transparent about actions taken to:

- Make sustainable seafood policy publicly available.
- Release an annual status report that summarizes goals achieved and identifies planned actions.
- Make sustainability information (i.e., common and scientific name, catch area or farm, country of origin, catch gear or farm technique used, environmental responsibility ranking) regarding seafood products easily accessible to customers and other interested parties. This includes:
 - In-store labels on their products.
 - Information shared via their Web site.
 - In-store signage or collateral materials.
 - Other marketing or outreach materials.

5) Education

Educating customers and key stakeholders along the seafood supply to:

- Train management and employees about issues of environmentally responsible seafood.
- Prepare sales staff to help customers choose environmentally responsible seafood selections.
- Share educational materials (e.g., signs, brochures, Web content) with customers about the status of the world's ocean life and key environmental criteria.
- Ensure suppliers are aware of environmental issues with seafood and equipped to address key concerns.

6) Reform

Engaging in policy and management reform including, but is not limited to:

- Advocating for national and international fisheries and aquaculture policies and management to be more environmentally responsible.
- Supporting efforts to collaborate across industry and conservation organizations to develop strong performance based metrics and high standards to tackle existing issues in wild and farmed seafood.
- Working with suppliers or producers to improve and document environmental performance.
 - For wild-caught seafood, work with suppliers and producers to move producer practices to meet environmentally responsible standards or credible certification. Set benchmarks to verify improvement.
 - For farmed seafood that is not certified under a credible eco-label, require that suppliers provide annual, third-party verified data which clarifies their farm's performance in addressing the key impacts of the species they are farming, and make nonproprietary data publicly available.

This information about the Common Vision was taken from the website of the Conservation Alliance for Seafood Solutions. The Alliance is a group of sixteen leading conservation organizations from the United States and Canada working together to pursue a Common Vision for Environmentally Sustainable Seafood, with the ultimate goal to preserve the health of ocean and freshwater ecosystems and ensure a long-term seafood supply.

Source: www.solutionsforseafood.org

Engaging Suppliers

Food retailers have the unique potential to influence sustainable production in the upstream supply chain by developing environmentally oriented purchasing requirements for their suppliers. Because of this, some retailers encourage or even require suppliers to make their own credible commitments to sustainable seafood (procurement, transparency of information about products, traceability, et cetera).

Buyers maintain an ongoing dialogue with their seafood suppliers as a part of doing business. And today, that conversation also includes sustainability, which is often included on the agendas of product review meetings. Suppliers play a key role in keeping retailers informed and working to drive change and improvements in various wild fisheries and aquaculture operations. For this reason, suppliers should partner with retailers on their journey to sustainability.

The engagement and expertise of conservation-minded suppliers is vitally important to the accurate assessment of the sustainability of all seafood products. Like company associates or employees, suppliers should (or should be encouraged to) fully understand and share the company's commitment to sustainability. Through the development of the Supplier Advisory Group, members of FMI's Sustainable Seafood Committee (SSC) maintain an ongoing dialogue with leading seafood suppliers about sustainability.

Members of the SSC Supplier Advisory Group include:

- Bumble Bee Foods, LLC
- Clearwater Seafood Limited Partnership
- Marine Harvest Canada, Inc.
- North Atlantic, Inc.
- Slade Gorton & Co., Inc.
- Trident Seafood Corporation
- Tropical Aquaculture Products, Inc.

Read on to learn how Loblaw Companies Limited, Bumble Bee Foods, LLC and North Atlantic Inc., supply customers with sustainable seafood.

Loblaw Supplies Sustainable Seafood

In 2009, the Canadian supermarket chain Loblaw Companies Limited (Loblaw) made a commitment to source all the wild and farmed seafood sold in its stores from sustainable sources by the end of 2013. Loblaw's sustainable seafood commitment is driven by one of its corporate social responsibility principles—Source with Integrity. This commitment covers all canned, frozen, fresh, wild and farmed seafood products, in all categories, across all brands and affects more than 50 percent of Loblaw's in-store departments.

A subsidiary of George Weston Limited, Loblaw is one of Canada's largest private sector employers with more than 1,000 corporate and franchised stores, more than 135,000 full-

time and part-time employees, and over \$30 billion in sales. The chain offers Canada's strongest control (private) label program, including the unique President's Choice, no name and Joe Fresh brands. It is estimated that control label products account for approximately 27 percent of Loblaw's retail sales. Many customers shop at Loblaw simply because it has their favorite control brand products.



Source: www.loblaw.ca

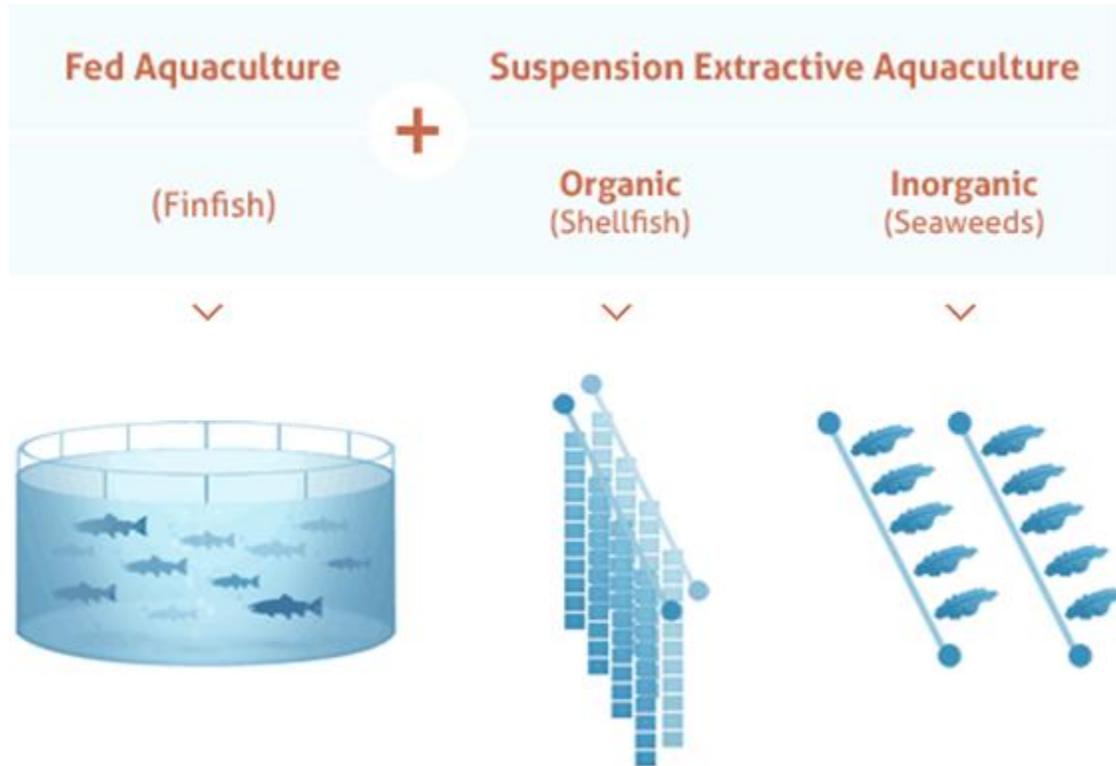
In keeping with its sustainable seafood commitment, Loblaw introduced a new product called WiseSource Salmon in Eastern Canada. Exclusive to Loblaw Conventional and Superstores, WiseSource Salmon is a more responsibly sourced farmed Atlantic salmon raised in Canadian waters using a method called Integrated Multi-Trophic Aquaculture (IMTA). IMTA is a method of growing multiple and complementary organisms in proximity to provide healthier waters through a balanced ecosystem management approach.

“Fresh farmed Atlantic salmon is the most popular fresh fish we sell, “ said Paul Uys, vice-president, sustainable seafood, Loblaw Companies Limited. “As we work towards our 100 percent sustainable seafood goal we understand that success requires collaboration. Our control brand products allow us to immediately work with our vendors and partners to ensure we make the most sustainable seafood available to our customers based on current methods, existing standards, and innovative practices such as IMTA.”

Dr. Thierry Chopin, a professor of marine biology at the University of New Brunswick, who leads a research team studying the IMTA approach to fish farming acknowledges that when Loblaw, the largest buyer and seller of seafood in the country, supports innovative farming and fishing procurement methods, this means that this research is relevant to society and also provides us with confidence the industry will continue to make progress in making sustainable seafood a reality.

The diagram below illustrates how WiseSource Salmon is grown. It shows how a combination of seafood products from varying levels of the food chain share one aquaculture environment and take advantage of organic and inorganic nutrients made available by each other. The mix of organisms from different levels of the food chain

mimics the functioning of natural ecosystems, and this overall balanced process is what helps to provide healthier waters.



Source: www.oceansfortomorrow.ca

“A commitment to Source with Integrity is one of five Loblaw corporate social responsibility principles, which also include Respect the Environment, Make a Positive Difference in our Community, Reflect our Nation's Diversity and Be a Great Place to Work. WiseSource Salmon, and in fact, all of our Loblaw control labels make us proud because they follow our philosophy of taking something good and making it better. That's what our customers expect when they shop in our stores,” said Uys.

Bumble Bee: Partnering with Science, Industry and the Conservation Community to “Make the Commitment” for Global Tuna Fisheries

Bumble Bee Foods, LLC (Bumble Bee) was founded in 1899 in Astoria, Oregon by a group of fishermen. Today, privately held and headquartered in San Diego, California, Bumble Bee has sales of over \$900 million and offers a full line of canned and pouched tuna, salmon, sardines, and other specialty seafood products marketed in the U.S. under brands including Bumble Bee, Brunswick, Snow's and Beach Cliff, and in Canada under the Clover Leaf brand.

According to Mike Kraft, Director of Sustainability at Bumble Bee Foods, LLC, “As a seafood company, ensuring the responsible harvesting and science-based management of fisheries from which we source is critical not only for the environment and our consumers, but to our business as well. As tuna represents a significant part of our business, we are naturally vested in the long term sustainability of the global tuna stocks used for canning.”

While many fish stocks are relatively geographically contained such that a single, or maybe several nations or agencies, are able to effectively manage the fishery, this is not the case with the global tuna stocks that are found in all major oceans and are highly migratory—crossing in and out of national boundaries as well as the high seas.

Global tuna fisheries are managed by four multi-laterals Regional Fisheries Management Organizations (RFMO) that include both coastal and distant water fishing nations. Each RFMO has a science committee that provides conservation recommendations, but because of the structure and nature of these RFMOs, which requires consensus, science-based measures and recommendations are not always adopted by the RFMOs.

To help drive the enactment of conservation measures at the RFMO level and to address the main sustainability challenges associated with global tuna fisheries such as bycatch, fishing capacity and IUU, the International Seafood Sustainability Foundation (ISSF) was formed in 2009 with Bumble Bee as one of the founders.

ISSF is a global partnership among scientists, tuna processors representing nearly 75 percent of the world’s shelf stable tuna production, and WWF, the global conservation organization. This combination of industry, science and the environmental community is committed to driving positive change in tuna fisheries through the direct action of its participants. As Chris Lischewski, President and CEO of Bumble Bee Foods and Chairman of ISSF states “we don’t want to have policy develop science; we want science to develop policy.”

The ISSF’s mission is to undertake science-based initiatives for the long term conservation and sustainable use of tuna stocks, reduction of by-catch and promotion of ecosystem health. The strategy and focus of the ISSF addresses some of the major sustainability challenges facing the global tuna fishery through applied science, advocacy and direct action to:



- Control and reduce fishing capacity
- Mitigate bycatch (unintended capture of non-targeted species)
- Eliminate illegal, unreported and unregulated (IUU) fishing
- Expand data support
- Advance performance in monitoring, control, and surveillance
- Improve overall tuna stock health

ISSF and its participants have committed to a number of actions aimed at ensuring long term sustainability of tuna and that drive specific procurement practices. These include: agreeing to traceability standards from capture to plate; not sourcing tuna caught using large scale drift nets or from IUU fishing; sourcing from boats with unique vessel identifiers; funding and supporting a multitude of sea turtle conservation projects; not sourcing tuna from purse seiners that were transshipped at sea; and adopting a resolution that bars participants from sourcing tuna from vessels and/or companies that engage in shark finning.

“The bycatch associated with purse seine fishing on Fish Aggregating Devices (FADs) is one of the areas to which ISSF is dedicating a significant amount of focus and effort. ISSF is facilitating a globally coordinated, \$12 million three-year at-sea project to identify best practices, new techniques and enhanced technologies that will allow fishers to minimize the amount of non-targeted fish and other marine life captured as a result of purse seine fishing for tuna,” said Kraft, “This research is being shared with vessel crewmembers through workshops hosted in communities around the world, fostering a direct dialogue that can have an immediate impact on the practices of fishers who supply the world’s processors with tuna.”

As part of the ISSF’s “Make the Commitment” global improvement plan, ISSF and its participants aim to eliminate half the discarded bycatch in tuna purse seine fisheries by 2014. The “Make the Commitment” plan, released in the summer of 2011, is a multi-year, global improvement plan which calls for best practices and commitments in not only purse seine fisheries, but in tuna longline and pole and line fisheries as well. There is still much work to be done, but ISSF’s ongoing work serves as a model of effective collaboration between science, industry and the NGO community.

North Atlantic Invests in Fishery Improvement

For many companies, foreign direct investment (FDI) represents an opportunity to become more directly involved in international business activities. It can provide a firm with new markets and marketing channels, cheaper production facilities, access to new technology, products, skills and financing. For a host country or the foreign firm which receives the investment, it can provide a source of new technologies, capital, processes, products, organizational technologies and management skills, and as such can provide a strong impetus to economic development.

In 2008, North Atlantic, Inc (NAI), an American seafood processor and distributor with long-standing relationships with US and EU retailers, joined forces with various strategic partners to develop an integrated business model to efficiently source, process and ship market-ready sustainable seafood products from Indonesia to North America, essentially creating a new sustainable supply chain.

To launch this new business venture, NAI and partners established a new operating entity: the jointly owned P.T. Bali Seafood International (BSI) to manage a streamlined supply chain, build processing infrastructure in remote locations, and to oversee operations of five planned mini-processing plants in the Lesser Sunda region.

Indonesia is one of the world's largest maritime countries with about 5.8 million square kilometers of marine territory and 92,000 km-long beach and coastal areas. It is the biggest archipelagic country in the world—approximately 70 percent of its territory is waters, which surrounds 17,480 islands. Despite the huge marine potential, however, Indonesia has so far been able to utilize only 8 percent of its marine resources. The contribution of the fishery sector to the country's Gross Domestic Product (GDP) in 2010 reached 3.1 percent. And, the Indonesian Maritime Affairs and Fisheries Ministry had set itself the target of increasing the fisheries sector's contribution to GDP from 3.1 percent to 3.5 percent in 2011.

For North Atlantic, Inc. (NAI) and its strategic Indonesian partners, this created a great opportunity to link the growing international market for sustainable seafood with emerging fisheries in Indonesia. "Bali Seafood International is based in Indonesia; I live there too and have committed myself fully to making real change happen on the water. I think it is time to push for real commitments from suppliers. We need to examine FIPs

Foreign direct investment (FDI) can be defined as a company from one country making a physical investment in the functional infrastructure of another country.

Infrastructure like buildings, machinery and equipment include the acquisition of a lasting management interest in a company or enterprise outside the investing firm's home country.

As such, FDI may take many forms, such as a direct acquisition of a foreign firm, construction of a facility, or investment in a joint venture or strategic alliance with a foreign firm.

[Fishery Improvement Projects] and to explore the critical question of who owns them, industry or NGOs," said Gerald C. Knecht, President of North Atlantic, Inc. and P.T. Bali Seafood International.

The company's vision to provide innovative systems and methods to support sustainable fisheries for coral and pelagic species in the Lesser Sunda region of Indonesia will ultimately help manage these valuable fishery resources toward sustainability for the mutual benefit of all stakeholders and create a scalable model to be applied to other regional and global fisheries. Their plan to accomplish this vision included a holistic strategy to:

- Control access and harvesting technology through government licensing
- Create community based fisheries management as compliance tools
- Provide ongoing fisher education programs at BSI mini-plants
- Employ economic incentives to drive fisher behavior
- Provide resources (ice, circle hooks, etc.) to raise percentage of marketable catch
- Provide accurate data collection and stock assessment
- Develop data collection systems in collaboration with Fisheries Ministries, NGO partners, and the University of California Santa Barbara
- Collect and disseminate data electronically
- Employ assessment guidelines for data-poor stock

In addition to creating access to new markets for Indonesia's sustainably caught seafood products, P.T. Bali Seafood International (BSI) will invest in creating long-term and measurable economic and livelihood value for local fishing and processing communities. Among other things, BSI aims to create alternative livelihoods by hiring 100 to 150 locals to staff each BSI mini-plant, and to provide incomes above the current subsistence level.

"To accomplish our goals, BSI is working across governmental agencies and with leading NGOs to identify alternative sources of livelihoods while simultaneously developing sustainable management strategies for local fisheries. The seafood industry is not broke or broken. To deliver on our sustainability promises and attract even more investments, seafood suppliers must take more decisive steps to implement functional, sustainable, structural, and social reforms in key international fisheries today," said Knecht.



Source: www.northatlanticseafood.com

Getting the Facts

Recent campaigns to increase corporate awareness of sustainable seafood have gained significant traction and serve as a major influence on how retailers buy and sell seafood. However, advice given about sustainable seafood is sometimes inconsistent and misleading. There is little consensus on what constitutes “true” sustainability and this presents an open window for mislabeling, misleading information, and inconsistencies from producers and marketers. In order to address some of these inconsistencies, ecolabels are often used to help retailers communicate to their customers that certain products have undergone review to address common concerns.

According to the Ecolabel Index, over 426 labels circulate in 246 countries and 25 industries. There are a number of eco-labels in the seafood marketplace. Eco-labels used to identify the sustainability of seafood products include the following: Marine Stewardship Council (MSC), Best Aquaculture Practice (BAP), Naturland, Ocean Wise, Aquaculture Stewardship Council (ASC), GlobalGAP, and Krav to name a few (see Figure 3). Additionally, retailers like Whole Foods Markets and Group Carrefour (France) have developed and branded their own internal standards and criteria to evaluate and communicate the sustainability of the products they sell.

Figure 3.



Source: www.ecolabelindex.com

Retailers may find it difficult to sort through all of the available information on this subject. Understanding what their seafood suppliers are doing with respect to environmental sustainability is one way to learn about some of the key issues. Additionally, many NGOs have programs that focus entirely on sustainable seafood and they too can serve as a valuable source of information and advice.

Read on to learn how Giant Eagle Inc., and Sobeys Inc., educated themselves about sustainable seafood.

Education through Experience: Giant Eagle Said “Show Me”

In 2010, Giant Eagle Inc. (Giant Eagle) made a public commitment to providing customers with a wide variety of the freshest and highest quality seafood while being good stewards of the marine environment and fisheries around the world. However, before making these commitments, Seafood Director Rich Castle made a point of learning first-hand about the opportunities and challenges surrounding sustainable seafood. According to Castle, “I just did not want to take someone’s word that their seafood was sustainable, I wanted to see the boats and to talk to the captains myself. I wanted to meet face-to-face with the people Giant Eagle was trusting to supply sustainable seafood.”



Source: www.gianteagle.com

The retailer worked with the international nonprofit organization, Sustainable Fisheries Partnership (SFP), to develop a comprehensive sustainable seafood procurement strategy geared toward offering the most sustainable sources of wild-caught and farm-raised seafood to consumers. This partnership with SFP builds on other similar activities, including the development of Giant Eagle's sustainable seafood policy, and development of a line of Eco Certified farm-raised Atlantic salmon in conformance with strict international standards for quality, traceability and sustainable production.

It has been said that people protect what they love and love what they understand. SFP knew that a true understanding of sustainable seafood could be gained through both personal and environmental experiences. To that end, the non-profit encouraged Giant Eagle to learn more about their suppliers’ sustainability efforts by going into the field to actively observe, participate and communicate around these shared endeavors. Giant Eagle went on field trips to commercial fisheries in the Gulf of Mexico, Alaska, Canada, China and Thailand. These experiences greatly increased Castle’s understanding of the key issues surrounding sustainable seafood. According to Castle, “after each field trip I experienced, I was able to reflect on the critical elements unique to that fishery, to link this new information to what I already knew about the products we had in our stores, and to immediately transfer this aggregate knowledge to the seafood department’s procurement policy.”

Through SFP, Giant Eagle became more engaged with their suppliers' Fisheries Improvement Projects (FIP) and Aquaculture Improvement Projects (AIP). "With 228 supermarkets throughout western Pennsylvania, Ohio, north central West Virginia and Maryland, Giant Eagle is one of the largest multi-format food retailers in the country. I want our customers to trust us when we say our seafood is of the freshest and highest quality, and I want to trust my suppliers when they say the seafood we source is sustainable," said Castle.

Education through Consensus: Sobeys Sought Solidarity

Sobeys Inc., (Sobeys) the Canadian grocery retailer and food distributor, is a wholly-owned subsidiary of Empire Company Limited. The company owns or franchises more than 1,300 stores throughout Canada under retail banners that include Sobeys, IGA extra, IGA, Foodland, Price Chopper, and Thrifty Foods. Sobeys and its subsidiaries conduct retail food business in four regions: Sobeys Atlantic, Sobeys Quebec, Sobeys Ontario and Sobeys West.

Though essentially decentralized, the four regions have been aggregated into one reportable operating company as they all share similar economic characteristics. However, the stores and customers in each region have different connections with the sea, different tastes in seafood, and different experiences with the marine conservation community.

Sobeys' challenge was not getting the facts, but rather getting consensus within the company on how to move forward with the information they had. Over time, Sobeys' executives educated themselves about the importance of sustainable seafood. They worked in collaboration with fisheries, processors, and relevant experts to create and implement long-term improvement plans with specific expected outcomes to address the most challenged fisheries.



Source: www.sobeyscorporate.com

Sobeys partnered with Sustainable Fisheries Partnership (SFP), an international sustainable seafood NGO, using a web-based seafood evaluation system to capture extensive data about the source and relative sustainability of seafood from suppliers. Through including the input of stakeholders from each region, Sobeys ensured that the

resulting seafood policy was better able to address potential concerns. Sobeys' collaborative business culture fostered greater group cohesion and interpersonal connection around sustainable seafood. Their decision-making process included and respected all parties, and generated as much agreement as possible. This facilitated greater cooperation when the group had to implement tough decisions.

Notably, the retail chain decided to address the sustainability of Canada's salmon supply (wild-caught and farm-raised). Sobeys invited their customers to take a deep dive into the issues and challenges facing the seafood industry through a series of videos that highlighted the complexities of the ocean ecosystem, broad-based efforts to preserve wild British Columbia salmon, and plans to implement responsible sourcing initiatives and fishery improvements. Sobeys interviewed many industry leaders and stakeholders about improvements being made to managing wild British Columbia salmon and featured videos of these interviews on their website. Both customers and employees had access to diverse perspectives on British Columbia salmon.

"We are committed to going beyond certification systems and eco-labels to focus on helping to improve the long-term viability of both wild-caught and farm-raised seafood in the most problematic fisheries we source from to ensure that seafood supplies are available to feed our customers today and for generations to come," said Shawn McMurter, Director, National Procurement, Meat and Seafood at Sobeys.

Engaging Employees

According to the FMI publication *The Food Retailing Industry Speaks 2011*, fiscal year 2010 turnover rate for all store employees averaged 34.9 percent with part-time store employees at 44.1 percent and full-time store employees at 11.2 percent. Recognizing the reality that high turnover is a challenge in food retail, the imperative to do consistent, ongoing training for store level employees becomes critically important – and particularly crucial in the seafood department where deeper product knowledge is essential.

It has been shown that the business benefits of environmental and sustainability education for employees include improving operational efficiency, strengthening customer and community relations, introducing innovations in supply chain management, and attracting and retaining employees. As a result, engaging employees in corporate sustainability initiatives has seen a recent explosion of interest and activity among retailers. For many, the ultimate goal is a cultural shift towards a more sustainable company. However, some food retailers struggle to fully engage employees in their sustainability vision, goals and strategy.

Employee knowledge and ability to answer customer questions is a direct reflection on the company. Consumers today are becoming more aware of the environmental impacts of the foods they eat, and store associates need to have a clear understanding of the company's commitment to and definition of sustainability so that they can explain the policy and programs to consumers.

A basic understanding of key elements affecting each seafood product sold in store—for example the impacts of fishing gear types, farming methods, and stock assessments—will help seafood department staff answer most customer concerns about seafood. It is also important to incorporate positive message points that reflect actions the company has taken to improve the sustainability of their seafood assortment into existing employee training programs.

Corporate culture typically develops over a long period of time and can be difficult to change. Many retailers are now thinking more critically about how to design their employee training programs to help influence the desired cultural shifts over time. Reaching this goal requires innovative tools for engaging employees in sustainability and measuring their impact. Employees represent the company to customers, and employees who are well informed about their company's sustainability initiatives can better align practices throughout the organization and help build a trustworthy corporate image over time.

Read on to learn how Lunds & Byerly's and Delhaize America engaged employees.

Delhaize Does Employee Training Online

Delhaize Group is a Belgian food retailer with operations in six countries located in North America, Europe and Southeast Asia. Delhaize Group's operations in the US are conducted through the wholly-owned subsidiary, Delhaize America.

Delhaize America (Delhaize) employs approximately 109,000 full-time and part-time associates. The company operates 1,627 stores in 16 states in the eastern United States under various banners including Bottom Dollar Food, Food Lion, Harveys, Hannaford Supermarkets, Reid's and Sweetbay, each of which has a distinct strategy and a well-established brand image.

In 2010, Delhaize America committed to selling seafood from sources managed to sustain the availability of seafood for current and future generations. Delhaize America's seafood policy requires suppliers to verify that seafood is coming from sources managed for sustainability and encourages local sourcing. The requirement applies to all seafood in the stores, including fresh, frozen and packaged fish and shellfish.

As part of the roll-out of their sustainable seafood program, the chain developed and launched computer-based training (CBT) modules to educate store associates about their new sourcing strategy. The 7-minute, self-paced, training session, was deployed at Hannaford Supermarkets in 2011 and will be available to other banners' seafood department employees and all store department managers in 2012. Additionally, any employee who wanted to learn more about Delhaize's new sustainable seafood policy was encouraged to participate in the trainings.



Delhaize’s sustainable seafood CBT included detailed information about the company’s sustainable seafood policy. It explored the reasons that the chain decided to address sustainability issues and how the company planned to implement its new policy. The training also includes talking points to help store associates answer some of the most common customer questions.

In-store technology provided the retailer with a platform to customize trainings to meet the needs and requirements of each banner in a way that was accessible to the busy work schedules of store associates. According to George Parmenter, Manager of Sustainability for Delhaize America, “the CBTs were a great start, but we plan to take our associate trainings to the next level. We know that different people have different learning preferences, so going forward we will supplement the CBTs with brochures, signs, and table talkers in staff break rooms. At the Hannaford banner, we are even considering assigning in-store experts who will serve as the storehouse of knowledge for all of Delhaize’s sustainability initiatives.”

For Delhaize, employee education is a process of continuous improvement. To ensure that employees are emotionally engaged and supportive of program goals, procedures and policies, the retailer plans to deliver accurate and credible information, in formats that are simple, easy to use and convenient.

Lunds & Byerly’s Does Employee Training Off-Site

Lund Food Holdings, Inc. operates 22 Lunds and Byerly's upscale grocery stores in the Twin Cities area of Minnesota. They specialize in providing their discerning clientele with extraordinary food, exceptional service and passionate expertise. In addition to featuring an impressive selection of organic and natural products, including certified organic produce departments, Lunds and Byerly’s also offers such amenities as catering, wines and spirits shops, online shopping and cooking classes.

In 2011, the chain launched a sustainable seafood program with a goal of sourcing 100 percent of its seafood from sustainable sources by the year 2015. Lunds and Byerly’s developed an internal sustainable seafood program called 'Responsibly Sourced,' designed to assure customers that their fish choice came from a sustainable wild or farmed fishery. To ensure that staff would embrace the new seafood philosophy, Lunds

and Byerly's took an active role in educating their employees about the company's new sustainability initiatives.



Source: www.lundsandbyerlys.com

To launch their seafood program to staff, the chain developed an in-depth “Master Training” which comprised of a one-day workshop at an off site location in town. Over six additional staff trainings were developed that included a mini version of the master training to educate remaining in store staff on sustainable seafood and the new Responsibly Sourced program. Lunds and Byerly's seafood sustainability training explicitly explained the store's policies around responsible seafood sourcing, providing vast amounts of background information on sustainable seafood via the company's website and through a 40-page educational employee manual.

According to Bea James, Sr. Manager of Organic, Natural and Sustainable Programs at Lunds and Byerly's, “We took approximately 100 store managers and department heads to an off site location for a full day intensive workshop. Getting them out of the store was an important part of helping to keep them focused and excited about what they were about to learn. We invited experts from national organizations like the Global Aquaculture Alliance (GAA), Alaska Seafood Marketing Institute (ASMI) and the Marine Stewardship Council (MSC) along with trusted suppliers like Tropical Aquaculture. And we engaged in a day of exploration, learning and sharing around key seafood sustainability issues and environmental concerns.”

Participants in the training session included 30- to 40-year veterans as well as younger employees just starting their careers with the company. Store leadership understood that this diverse group of employees would have different perspectives about the importance and relevance of sustainability to their jobs, so Bea James designed the trainings to accommodate varying levels of knowledge, interest and comfort around sustainability.

James also expanded the accompanying training manual to include the information and questions shared during the “Master Training” sessions to better equip store employees to speak with confidence about the company's procurement policies and practices. For example, Lunds and Byerly's customers love salmon and the chain reportedly sells more

salmon than any other retailer in their market area, but “because our employees are aware of the sustainability issues surrounding farm-raised salmon, our seafood departments have been navigating customers toward more and more sustainable seafood choices, like promoting wild-caught Alaskan Coho or Chinook salmon. As a result, I'm proud to say that we have made significant strides toward our 2015 goal,” said James.

Engaging Customers

Retailers know their customers. According to the Food Marketing Institute (FMI), the average consumer visits the supermarket 1.75 times per week. Additionally, the average supermarket carries over 38,000 items in each store and processes over 12,000 register transactions per week, per store. This regular connection with consumers gives food retailers the opportunity to change purchasing behavior by helping to educate customers about sustainability issues.

Though consumers' sustainability consciousness is growing, the consumer segment is still relatively small. In 2010, the Perishables Group of West Dundee, Illinois conducted an online survey of 1,000 consumers; the survey found that 21 percent of consumers age 34 and younger regularly buy sustainable seafood, compared to 15 percent for consumers ages 35 to 54, and 7 percent for consumers age 55 and older.

Consumers' good intentions do not always translate to purchasing behaviors. For many companies, communicating green or sustainable business strategies is tricky, especially if it involves the need to pay higher prices for products during an economic recession.

Communicating effectively with customers is critical to the long-term viability of retailers' sustainability programs. However, the wide array of sustainability indicators and eco-labels causes confusion in the marketplace, and companies must impart the information most relevant to the consumer to effectively inform purchasing decisions.

Understanding what motivates an audience is the first step in knowing how to talk to them. A real challenge in communicating seafood sustainability to customers lies in translating the big vision of ocean conservation into messages that are both personal to the audience and practical in terms of inspiring a response.

In order to communicate successfully about sustainable seafood, retailers may need to link the subject to issues such as health, wealth or job creation, or to self-improvement aspirations.

Many companies distribute their corporate social responsibility (CSR) reports online in web-based formats. However, it is important to recognize that some consumers desire information on a company's sustainability programs through different avenues and that these consumers may require more than a low-key approach to CSR communication.

Leading companies recognize that sustainability opens new avenues for communication with consumers and that a well-developed, well-executed and well-

communicated sustainability strategy can help with building trust in a brand and a corporation. Companies must actively engage conscious consumers in meaningful dialogues around their sustainability policies and programs. Companies should also remember that consumers expect them to be doing the right thing anyway.

Read on to learn how Hy-Vee, Inc. and Fresh & Easy Neighborhood Markets engaged customers.

Hy-Vee Cooks-Up New Ideas for Customers

Headquartered in West Des Moines, Iowa, Hy-Vee, Inc. (Hy-Vee) is an employee-owned private corporation operating 235 retail stores across eight Midwestern states including Illinois, Iowa, Kansas, Minnesota, Missouri, Nebraska, South Dakota and Wisconsin. The company generated sales of more than \$7.3 billion in 2011 and employs more than 60,000 people.

Hy-Vee recently introduced a seafood procurement policy committing to sell seafood that is not only safe for consumption but is also harvested or raised in a manner that provides for its long-term viability (sustainability) while minimizing damage to the environment and other sea life. To help ensure consistency with their policy Hy-Vee committed to educating buyers, employees and customers about seafood quality, safety and sustainability. As a part of this effort, Hy-Vee also partnered with an NGO to help assess the sustainability of its seafood products and supply chain.

In recent years, food has moved from a primary role of providing sustenance, to being a form of media entertainment. However, even though celebrity chefs, cooking shows, cooking magazines and exotic restaurants have stirred consumer interest in the topic of sustainable seafood, some people are still not comfortable preparing a seafood meal at home.



Enter the Hy-Vee seafood counter clerks, chefs and dietitians who provide customers with the tools and information necessary to make educated food choices. These

knowledgeable store associates help Hy-Vee customers to feel confident about their seafood purchases. Hy-Vee stores feature cooking demonstrations so that dietitians or chefs can show shoppers the benefits of a particular food right where the food is sold.

According to Michael Smith, Assistant Vice President, Real Estate and Sustainability for Hy-Vee, “Often consumers see raw fish and think it really looks great, but are unsure of how to prepare it. Our stores use the educational opportunities created by our in-store chefs and dietitians to surprise and delight customers with our seafood selection. Some customers come to our stores for our great beef, pork and chicken selection, and leave realizing we also have a great selection of seafood. Our dietitians, who have a vast knowledge about the health benefits of foods, and chefs, who have that special ability to combine these healthy ingredients, help our customer discover new ways of utilizing sustainable seafood products to create healthy and delicious meals.”

Hy-Vee’s registered dietitians lead store tours and conduct cooking demonstrations that highlight healthy and sustainable food choices throughout the store. Hy-Vee employs approximately 150 in-store chefs and another 150 retail dietitians who work together to develop healthy recipes featuring sustainably sourced products that customers can make at home. This collaborative effort is a unique benefit Hy-Vee offers shoppers who are both nutrition-conscious and conservation-minded.

“Our communications efforts now include educating the consumer about the health impacts of food, such as teaching them how the NuVal Nutritional Scoring System can help them make more nutritious food choices. Our chefs and dietitians aren't working exclusively in food service; you'll also find them in the seafood, produce, and bakery departments, or wherever necessary to partner with our customers. In many cases the best communication a retailer can do around sustainable seafood is to simply educate shoppers on how they can turn the sustainable seafood on display into an enjoyable meal for themselves and their families,” said Smith.

Fresh and Easy Asks Customers What They Really Want

U.S. based Fresh & Easy Neighborhood Market (Fresh & Easy) is owned by the British retail giant Tesco PLC. The first Fresh & Easy stores were opened in November 2007. Today, the chain operates 185 Fresh & Easy stores throughout California, Arizona and Nevada. The chain is committed to health and wellness, and environmental stewardship. All Fresh & Easy brand products contain no high-fructose corn syrup (HFCS), artificial colors, flavors or added trans fats and use preservatives only when necessary. On average, Fresh & Easy stores use 30 percent less energy than a typical supermarket - helping the environment and so saving customers money.

Tesco has had a longstanding commitment to only sell fish from responsibly managed sources and to help their customers make informed decisions about the fish they buy. In mid-2011, Fresh & Easy started to develop their own sustainable seafood policy. As a first step the chain held a series of focus groups with their customers to better understand

how their customers defined sustainability and if environmental issues or concerns drove their purchasing decisions.

Like many food retailers, the chain was grappling with whether their sustainability business practices truly mattered to consumers and if their customers would reward the company's increased investments in sustainability initiatives.

What makes this more challenging is the fact that Fresh and Easy's in-store seafood departments are 100 percent self-service. So, the company's communications to customers after the program was launched had to be done primarily through marketing messages, signage and packaging.



According to Denise Webster, Supplier Standards and Policy Manager for Fresh & Easy Neighborhood Market Inc., “our customers told us that they wanted fish that is high quality, and will be there for generations. They also wanted all of this at a good value. Our job then, was to partner with our customers so they could feel good about their seafood purchases. This is the responsibility of the retailer, to help clarify the significance of our sustainability efforts to the company's business profile, customers, products, employees and future.”

Customer engagement is critical to any successful sustainability program, so it was important for Fresh & Easy to understand how their new sustainable seafood policy would affect their customers. The chain felt it important to engage these key stakeholders in the design, adoption and promotion of their seafood sustainability program before significantly communicating their commitment to the rest of the world.

“The delicate act of balancing green communications starts with sustainability minded organizations engaging with key stakeholders, like customers, who have a vested interest in the success of the business to profoundly advance the sustainability conversation,” said Webster.

On the Horizon

The National Ocean Policy

America's stewardship of the ocean, coasts, and the Great Lakes is intimately linked to national prosperity, environmental sustainability, human health and well-being, adaptation to climate and other environmental change, social justice, foreign policy, and national and homeland security. Executive Order 13547 of July 19, 2010 adopted a National Policy that includes a set of overarching guiding principles for management decisions and actions toward achieving the vision of "an America whose stewardship ensures that the ocean, our coasts, and the Great Lakes are healthy and resilient, safe and productive, and understood and treasured so as to promote the well-being, prosperity, and security of present and future generations."

**By Executive Order of President Barack Obama,
it is the Policy of the United States to:**

- Protect, maintain, and restore the health and biological diversity of ocean, coastal, and Great Lakes ecosystems and resources;
- Improve the resiliency of ocean, coastal, and Great Lakes ecosystems, communities, and economies;
- Bolster the conservation and sustainable uses of land in ways that will improve the health of ocean, coastal, and Great Lakes ecosystems;
- Use the best available science and knowledge to inform decisions affecting the ocean, our coasts, and the Great Lakes, and enhance humanity's capacity to understand, respond, and adapt to a changing global environment;
- Support sustainable, safe, secure, and productive access to, and uses of the ocean, our coasts, and the Great Lakes;
- Respect and preserve our Nation's maritime heritage, including our social, cultural, recreational, and historical values;
- Exercise rights and jurisdiction and perform duties in accordance with applicable international law, including respect for and preservation of navigational rights and freedoms, which are essential for the global economy and international peace and security;
- Increase scientific understanding of ocean, coastal, and Great Lakes ecosystems as part of the global interconnected systems of air, land, ice, and water, including their relationships to humans and their activities;
- Improve our understanding and awareness of changing environmental conditions, trends, and their causes, and of human activities taking place in ocean, coastal, and Great Lakes waters; and
- Foster a public understanding of the value of the ocean, our coasts, and the Great Lakes to build a foundation for improved stewardship.

Source: www.whitehouse.gov/administration/eop/oceans/policy

Connecting Seafood Sustainability to Ocean Conservation

By Dawn Martin

President and CEO, SeaWeb

In the mid-1990s, there was little awareness by the American public of the key issues affecting ocean health. In response, SeaWeb developed messaging and a unique strategy to connect people to the ocean through their appetite for seafood. This ‘ocean to plate’ connection, as it is known, initiated an important discussion around seafood sustainability. People began asking questions about where their seafood came from, how it was caught, how healthy a fishery was, and more. Today, the dialogue has become more sophisticated, and issues such as illegal fishing, traceability, habitat protection, marine protected areas, standard setting, jurisdiction over the high seas, local and seasonal availability, are among the many issues, including social justice and human rights, that have risen to the surface.

Ocean conservation takes many forms and there are a myriad of organizations and businesses implementing a host of important measures. While many believe that people are the problem, SeaWeb views them as the solution. Engagement by the public and acceptance of a sustainability ethos by seafood industry employees is essential to integrating sustainability throughout the seafood supply chain.

Retailers, often the public’s link to the supply chain, play an increasingly critical role in ocean conservation. Certification, fishery improvements projects and NGO partnerships are just some of the tools used by retailers to positively impact people, places and practices where perhaps other regulatory or legal efforts have been ineffective. The stakes are high, yet the opportunities to maximize the potential of increased collaboration and innovation are limitless.

When conservation, science, regulatory, legal and consumer facing efforts are in sync and players appreciate the value of each perspective, solutions emerge for a broad cross-section of stakeholders. Retailer and marketplace engagement, not only brings purchasing power to bear on sustainable seafood and ocean conservation, but it ensures a seat at the table so that solutions to conservation and sustainability take into account the interests of all stakeholders.

The future holds promise but there is important work to be done. Consideration of the economic challenges for small producers and local communities, the expansion of community supported fisheries, responsible aquaculture, science-based catch limits, calculating the true “cost” of transportation can move us forward. A considerable number of resources and information are available to address these and other complexities of seafood sustainability. SeaWeb encourages you to seek them out and consider how you can become a seafood champion to ensure the availability of sustainable seafood into the future.

SeaWeb is the only international, nonprofit organization exclusively dedicated to using the science of communications to fundamentally shift the way people interact with the ocean. We transform knowledge into action by shining a spotlight on workable, science-

based solutions to the most serious threats facing the ocean, such as climate change, pollution and depletion of marine life. We work collaboratively with targeted sectors to encourage market solutions, policies and behaviors that result in a healthy, thriving ocean. By informing and empowering diverse ocean voices and conservation champions, SeaWeb is creating a culture of ocean conservation.



Dawn M. Martin joined SeaWeb in 2004, first as its Executive Director and then as the organization's President and Chair of the Board. For more than 25 years, Martin has employed creative communication strategies to advance ocean conservation, social and economic justice and human rights through policy and marketplace changes. Her experience includes working the U.S. Environmental Protection Agency, several non-profit organizations and the business sector.

Martin brings a multidisciplinary approach that builds on her organizational management experience and skills as an attorney, political strategist, lobbyist and communications professional. During her tenure with SeaWeb, she has expanded its international reach and provided the vision and policy development for several award-winning campaigns and successful initiatives. Martin sits on the Board for the Communication Partnership for Science and the Sea (COMPASS) and the National Marine Sanctuary Foundation where she serves as its Vice-Chair and Treasurer. She is also on the Editorial Board for the Smithsonian National Museum of Natural History's Ocean Portal, the Advisory Board of the Center for Health and the Global Environment at Harvard Medical School and is a founding member of the steering committee for the Global Forum on Oceans, Coasts and Islands.

Martin received her undergraduate degree from Loyola Marymount University in Political Science and Business Administration. She received her Juris Doctorate from Loyola Law School, Los Angeles and received an emphasis on international human rights and humanitarian law from the International Institute of Human Rights in Strasbourg, France, and the Henri Dunant Institute in Geneva, Switzerland.

Sustainable Seafood: Looking Back, Moving Forward

By Howard Johnson

Global Programs Director, Sustainable Fisheries Partnership

Although I began my 40-plus year seafood career in 1970 my roots in the industry go back to growing up in the Scandinavian neighborhood of Seattle called Ballard. Many of my school classmates were the children of fishermen and fishing boats lined the waterfront canal that connected Puget Sound to Lake Washington. In the 1950s the downtown Seattle waterfront was crowded with fish plants receiving fresh salmon, ling cod and halibut from gillnetters, purse seiners and trollers plying the waters of Puget Sound. The fish are mostly gone from Puget Sound now done in by pollution and overfishing and the plants have given way to hotels, condos, restaurants and other tourist attractions.

Looking Back

My seafood career has played out in roughly three parts, procurement and production (10 years), consulting (20 years) and advancing sustainability (10 years). People in the seafood industry like to say that once it gets in your blood you can never leave the business. Tis true, at least in my case. When I got started in the industry back in 1970 Americans ate 11.2 pounds of seafood per capita roughly 226 million pounds in total and we imported 1.8 billion pounds of seafood versus just 148 million pounds of exports. Much of our seafood consumption was canned fish or frozen fish sticks. Fresh salmon and shrimp were luxury products reserved for special occasions. Back in 1970 the Magnuson Act, which set in place a regional framework for fishery management and a goal of sustainability, was still six years away and foreign fishing and processing vessels took much of our coastal fishery resources with reckless abandon.

About 10 years ago, wearing my “seafood consultant” hat I wrote an op-ed piece for an industry news web site suggesting that the seafood industry needed to pay more attention to the issue of sustainability. At the time NGOs were launching attack after attack at the industry and the industry was tossing grenades right back. I suggested at the time that what was needed was more dialogue and less rhetoric.

While it took the better part of a decade for the seafood industry and the conservation community to reach an understanding with respect to seafood standards, ecolabels and sustainability that day has arrived. Today almost every major food retailer in North America and Europe has a sustainable seafood procurement standard. Now seafood procurement includes more than just knowing the price and quality but also traceability and sustainability.

Looking Forward

Seafood sustainability is not a destination so much as a journey. Over time things will change, for better or for worse, and how we as an industry maintain sustainability will need to change with the times. For example, looking forward I see three key areas that will impact seafood supply and potentially sustainability of both wild and farmed sources. The first is climate change. Shift ocean conditions will greatly impact wild stocks causing some to increase, others perhaps to move geographically and others

potentially to disappear. Climate change is already impacting shellfish because of the increase in the acidity of the ocean. The second area that will greatly impact seafood supply and demand is China. If China continues to increase per capita seafood consumption as the current rate they could potentially corner the market on many key species. When China goes shopping for seafood they do not currently respect any international standards for sustainability. If the situation does not change almost by definition unsustainable seafood will default to China until the source disappears or; China adopts sustainable seafood sourcing policies. The final key area is aquaculture. Can aquaculture increase production to meet future demand without compromising the environment? While there is no simple answer to this question the solutions may come from advances in aquaculture production technology that allows us to grow more seafood with less environmental impact.



Howard M. Johnson

Mr. Johnson is president of H.M. Johnson & Associates, a seafood marketing and market-research firm based in Jacksonville, Oregon. He is publisher of *The Annual Report on the United States Seafood Industry*. Mr. Johnson has over 30 years experience in seafood sourcing, sales, marketing, market research and new product development. He has assisted companies and marketing organizations develop marketing plans and strategies and been involved in start-up seafood and aquaculture projects in Southeast Asia, South America, Alaska and the Pacific Northwest. He is an industry authority on seafood consumer research. Mr. Johnson is a frequent speaker at national and international seafood conferences and is utilized as a seafood information source by the New York Times, USA Today, the Wall Street Journal and other leading publications.

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This publication was made possible through the generous support of:

