

GREENPEACE

A RECIPE FOR CHANGE

**Supermarkets respond to
the challenge of sourcing
sustainable seafood**

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**Beam trawler,
Dogger Bank,
North Sea:**
70% of the catch
from beam trawlers
is thrown away,
dead or dying.

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INTRODUCTION

1.1 An industry in transition – the rise of sustainable seafood

The seafood industry is changing rapidly. Standards and practices established long ago for the catching, processing and selling of seafood are adapting to meet a new and demanding criterion – that of sustainability. In the last year alone, businesses the length of the seafood supply chain in the UK, Europe and beyond have begun to seriously address the crisis taking place in our oceans – as a result of destructive fishing methods and sheer overfishing.

In October 2005, Greenpeace launched its report: *A recipe for disaster – Supermarkets' insatiable appetite for seafood*, which challenged the seafood industry, particularly the major retailers, to begin the process of ensuring that all the seafood they sell comes from sustainable sources.¹ In just one year, most of the UK's major retailers have engaged in this process – removing from sale some of the most destructively-fished species, increasing their range of better-managed stocks and engaging constructively in finding sustainable solutions for many of the most commonly stocked species.

'Love them or hate them, environmental groups have radically changed your industry... It looks like 2006 will be the year sustainability finally took a firm hold on the seafood industry.'

Drew Cherry, IntraFish, March 2006²

Among the many changes that have occurred, some notable advances in the sustainability of UK seafood retail in 2006 include the following:

- **M&S** and **Waitrose** have remained leaders in the sustainable seafood market. M&S has continued to run its seafood operation to best practice standards and has been a powerful advocate for sustainability in the seafood industry. Meanwhile, Waitrose has raised the benchmark for standards in fishing practice by committing to remove all beam-trawled products from its shelves by the end of 2007.

- **Sainsbury's** has made great strides this year with its new seafood sourcing policy, which applies vigorous environmental standards to all the seafood it sells. The new policy has led the company to delist skate from all its stores, foregoing its annual turnover of £650,000.
- **ASDA** adopted a comprehensive sustainable seafood policy in January 2006, which led to the immediate delisting of dogfish, Dover sole and skate. Later in the year the retailer stopped selling any cod caught in the North Sea. In its most exciting and challenging commitment so far, ASDA has also committed to selling only Marine Stewardship Council (MSC)-certified fresh and frozen fish within five years.
- **Morrisons** has also adopted a new sustainable seafood sourcing policy and has made a serious commitment to continue addressing sustainability issues over the coming years.

'The principle of sustainable seafood has moved from press release piety to serious commitment.'

Kit Davies, *The Grocer*, April 2006³

Change is not limited to the UK sector. In response to similar reports released by Greenpeace in Austria and France, the seafood industry is also beginning to change on the continent. In Austria, many of the largest retailers and wholesalers have actively engaged with Greenpeace on the issue – with several adopting new sustainable seafood policies. Shark has now been delisted from every retail chain. Meanwhile, in France, retailer Auchan has also adopted a new sustainability policy. Among other measures, the company will no longer sell wild-caught sea bass between December and March – to avoid the species' spawning season – and will actively encourage consumers to buy seafood species from better-managed sources. The movement is even taking hold in the USA, where retail giant Wal-Mart has committed to ensuring that all its fresh and frozen fish is MSC-certified within three years. Over the coming months, Greenpeace aims to extend the challenge to the seafood industries in a number of the Nordic countries.

1.2 Changes in public attitude

This is not simply an industry-led revolution. The changes taking place are being demanded and supported by the majority of European consumers. Research polls carried out for the Seafood Choices Alliance in 2005 revealed that 79% of people consider the environmental impacts of seafood to be an important factor in their purchasing decisions.⁴ The same research showed that 86% of those surveyed would prefer to buy seafood reliably labelled as environmentally responsible, and 40% would be willing to pay an extra 5–10% more for such products. The seafood industry would do well to take notice of these indications of changing consumer demand.

'All this adds up to an unavoidable message for fishermen – jump on the bandwagon before you get left behind. We can all complain endlessly about the power of the green movement, but it cannot be stopped and it is now having a real impact in the market place.'

Fishing News, March 2006⁵

1.3 The challenge ahead

Change is under way and is gathering pace, but there is still much to be done to ensure that the world's oceans and the ecosystem within them are protected from excessive and destructive fishing.

The global demand for seafood continues to rise, placing ever-greater demands on the finite resources in our oceans.⁶ As many of the more popular fish stocks are run down from our near shores, fishing moves into deeper waters. Larger and more powerful fishing vessels, equipped with bigger nets and state-of-the-art fish-finding technology, allow fishermen to take previously unfished species from the high seas.

Aquaculture, often promoted as being the solution to sustainable fisheries, has undergone a massive growth over the last 50 years. Unfortunately, with the exception of some shellfish-aquaculture practices and freshwater fish reared in ponds, most aquaculture exacerbates the pressures placed on over-exploited marine

ecosystems.⁷ In particular, wild-caught fish are used for fishmeal and fish oil to feed farmed stocks; disease and pollution from intensively farmed fish further impact wild stocks and surrounding ecosystems; and many aquaculture practices are associated with poor human rights records.

Year after year, massive quantities of seafood continue to be removed from the ocean. If the seafood industry is serious about addressing sustainability, it must acknowledge that the world's fish stocks cannot cope indefinitely with this relentless strip-mining. The level of responsibility and the size of the challenges facing retailers and the other major players in the seafood industry have never been greater. Much has been achieved in 2006, but harder and more complex challenges in sourcing sustainable seafood lie ahead. It remains to be seen if the UK's major supermarkets can continue to meet these challenges.

1.4 In this report

Almost a year has passed since Greenpeace first challenged the major UK retailers to ensure that the seafood they sell is sustainable.

A recipe for change – Supermarkets respond to the challenge of sourcing sustainable seafood is a review of the progress that supermarkets have made on this issue over the last 12 months. In the main body of the report, the new policies of each supermarket are reviewed in detail. In the final chapter, we assess this information and present the updated league table of supermarket performance.

Finally, this report demands stronger commitments within supermarkets' sustainable seafood policies by calling for action on two urgent issues. Supermarkets must:

1. Take action to radically improve the UK skate fisheries or stop selling skate altogether.
2. Stop selling seafood species that are caught by one of the most destructive fishing methods – beam trawling.

'All credit to Greenpeace for identifying the simple thing each of us can do to fight back against the threat to the oceans.'

Max Hastings, *The Guardian*, October 2005⁸

**Skipjack tuna,
Solomon Islands,
Pacific Ocean:**

The livelihood of
local fishermen is
threatened by
global overfishing.

© Greenpeace/Behring-Chisholme



MARKS & SPENCER

‘Quality & trust’



2.1 M&S's background

Marks & Spencer (M&S) began in 1884 as Marks' market stall at the Kirkgate market in Leeds. The M&S partnership was formed in 1894 and became a limited company in 1926. Fresh produce and canned food were introduced in 1931.⁹

M&S is now one of the UK's leading retailers of clothing, foods, homeware and financial services, serving 15 million customers a week in 450 UK stores, and employing 65,000 people. Of these stores, 177 are M&S 'Simply Food' outlets – with food accounting for 45.2% of the company's UK sales. With a £3.6 billion turnover in this area, M&S has a 3.5% share of the market in food sold in the UK. The company also has a growing international business, which includes wholly-owned stores in the Republic of Ireland and Hong Kong, and 200 franchise stores in 30 countries. In 2005/06, the annual group turnover in the UK was £7.8 billion.¹⁰

M&S aims to earn the strongest possible reputation for product safety, sustainable raw materials, animal welfare, employee welfare and working with communities. The retailer seeks to serve customers who want to 'do the right thing' without having to hunt for specific labels, believing that customers want the retailer to do the hard work for them. M&S has been ranked as the world's leading retailer in the Dow Jones Sustainability Index each year from 2003 to 2005, and was named as 'Business in the Community's Company of the Year' in 2004 and again in 2006 – the first company to receive this award twice.

2.2 M&S's seafood policies – a history

M&S started its work on sustainable seafood procurement in 1996, when the company adopted its Policy on Sustainable Sourcing of Fisheries Products, which applies to all the wild and farmed seafood it sells, including fish used as an ingredient. Mike Barry, Sustainable Development Manager, and Andrew Mallison, a fisheries scientist and Seafood Procurement Manager, have talked openly with Greenpeace about M&S's current and future projects on seafood sustainability, and have provided Greenpeace with the company's full seafood policy¹¹ and all the relevant codes of practice. M&S's detailed policies and their implementation across all the seafood sold in its stores earned the retailer a score of 17 out of 20 and top place in the supermarkets' league table in *A recipe for disaster*. In March 2006, the Seafood Choices Alliance named M&S as a Global Seafood Champion for its leadership in promoting sustainable seafood¹² and the Marine Conservation Society named M&S as the number one UK retailer of sustainable fish.¹³

2.3 M&S's seafood policies – current

M&S's seafood policy is based on written codes of practice on fishing by trawling and long-lining (covering issues from net and line specifications through to storage and transport),

and farming (particularly salmon and warm-water prawns). Since 2003, M&S's goals and achievements in seafood sustainability have been outlined each year in its annual corporate social responsibility (CSR) reports,¹⁴ and its website includes in-depth customer information on its seafood policies, with pictures and detailed descriptions of its chilled fish fillets range.¹⁵

M&S is the only supermarket chain to employ a qualified fisheries scientist to manage seafood sourcing. As M&S does not sell any other brands, every piece of seafood it sells – from fillets to sandwich fillings to pizza topping – comes under its sourcing policy. To encourage others in the seafood industry to develop sustainable seafood policies, Greenpeace has adopted the basic model of M&S's policy: support the best, avoid the worst, help the rest improve.

2.3.1 Seafood and suppliers

M&S sells over 32 species of seafood (depending on seasonal availability), sourced from all over world and sold as pre-packaged chilled fish, processed fish ready meals and other items. M&S does not have fresh fish counters in its stores. M&S's main supplier is Coldwater Grimsby (formerly Cavaghan and Grey), a company that supplies fresh fish and coated fish products to M&S.

M&S develops close relationships with its suppliers and holds listening groups with fishermen to discuss sustainability issues and consumer concerns. Iain Harcus from Kirkwall, Orkney, was the first to display the M&S 'Unique Food Supplier Badge' on his fishing boat, and helps M&S to develop methods for sustainable fishing of Scottish haddock (see section 2.3.4).¹⁶

M&S has an ongoing programme of inviting fishermen to visit both stores and production sites, which provides an opportunity for M&S to present consumer concerns on sustainability direct to the fishermen. Visits are arranged in conjunction with the Seafish Industry Authority (Seafish) and have covered areas including Cornwall, northern England and Scotland. M&S is also using these visits to encourage fishermen to adopt the Seafish Responsible Fishing Scheme, which sets standards for fishing vessel operations, including fishing practices, quality of catches, safe and hygienic storage, traceability, crew competence and some basic environmental considerations. At this early stage, adoption of the scheme will be on a voluntary basis – with a view to making the scheme mandatory for vessels supplying M&S by 2009.

2.3.2 Wild seafood procurement policies

The decision to source from a particular fishery is the responsibility of the Seafood Procurement Manager, who reviews all the data on the fishery against the codes of practice to classify fisheries as either 'acceptable', 'level of concern requiring action', or 'unacceptable'.

According to the company's sourcing policy, each M&S seafood product must be obtained from reputable producers, operating within relevant regulations and with respect for the environment. Where possible, fisheries will have been certified as sustainable by independent organisations such as the MSC, and be managed in accordance with the United Nations Food and Agriculture Organisation (FAO) Code of Conduct for Responsible Fisheries. All fisheries that supply M&S are audited in detail to ensure that they comply with the policy.

M&S obtains wild fish only from stocks controlled by fishery management systems. Suppliers are required to maintain reference data on every source of each seafood species, including scientific advice from the relevant organisation for the stocks in question (eg the International Council for the Exploration of the Sea (ICES) for North-East Atlantic stocks), to verify that the fishery is not causing stocks to decline, damaging the environment, or generating significant quantities of discards.

All seafood must be traceable back to the vessel which caught it, with evidence that the catch was within quota where applicable. Fish from undeclared (illegal) landings are prohibited. Due to concerns over traceability, M&S does not use cod, haddock or other species that have been shipped to China for reprocessing before being returned to Europe.

The fishing methods used should not adversely impact on non-target species, such as marine mammals or seabirds, or cause permanent damage to the environment or food chain. All fishing gear must comply with, and where possible exceed, current regulations for the fishery (eg minimum mesh size for nets). The gear used should optimise fish quality rather than quantity, and suppliers should encourage vessel operators to adopt best practice in gear design. M&S will not purchase from any company actively involved in capturing or processing marine mammals.

M&S maintains a 'Banned Species List' of seafood species it considers unsustainable. The retailer has also extended its range to relieve pressure on more traditional species. Witch and dab were introduced in 2005 as an alternative to flatfish such as plaice, and Cornish pollack and farmed tilapia were launched in summer 2006 as an alternative to traditional species such as cod and haddock.

M&S only sources wild species once they have reached maturity and spawning age – products based on immature fish, such as whitebait, are not sold. During 2005/06, M&S introduced larger fillets of several species including Dover sole, plaice and cod, to allow the use of more mature fish. Sourcing details for the more controversial species (often sourced from unsustainable stocks using destructive fishing methods) follow:

Cod and haddock

Both smoked and chilled (uncoated) fillets come from fish line-caught in Icelandic waters, and M&S has set a new goal of switching the remaining cod and haddock in its other ranges to 100% line-caught by 2008.

At present the *Skalaberg*, a factory ship that fishes in the Barents Sea and the North Atlantic, works to the M&S guidelines for trawling, supplying cod and haddock exclusively to M&S for its chilled and breaded frozen ranges. All other cod for breaded and frozen products is sourced from approved trawlers and processors in Iceland, and haddock is either

trawl-caught in Iceland or line-caught in the Faeroe Islands – except for the chilled breaded Scottish haddock range, which is supplied by the Scottish haddock trawlers involved in the research programme described in section 2.3.4.

Flatfish

M&S has particular concerns about the traditional use of beam trawling to catch species such as Dover sole, lemon sole and plaice, particularly by the Dutch fleet operating in the North Sea. Over the last two years, M&S and its suppliers have visited Dutch processors, fishermen's groups and government representatives to push for the use of lighter fishing gear and smaller, more fuel-efficient boats. Processors supplying M&S have been asked to preferentially buy from smaller boats using lighter gear.

As a result of this work, the percentage of beam-trawled flatfish purchased by M&S has been reduced from 55% of all flatfish purchased in 2004 to 47% in 2005, and then 35% in August 2006 – a reduction of over one-third. The beam trawlers still in use are smaller and therefore use less fuel, but a further reduction to 25% beam-trawled products is planned in 2007.

Of the various flatfish fisheries which use beam trawling, those for Dover sole rely most on this method, with only small quantities of this species being caught by alternative fishing methods. To further reduce the proportion of beam-trawled fish it buys, M&S is committed to researching new technology to catch Dover sole.

Monkfish

In the past year, M&S has been selling American and Brazilian monkfish to reduce impacts on European stocks. The Brazilian stock is relatively unexploited, and M&S hopes to have a positive influence on the Brazilian fishermen and the way they manage the stock. However, the American species is listed in two US seafood guides as one to be avoided by consumers, since stocks have been seriously depleted, although they are showing signs of rebuilding.^{17,18} In early 2006, a review of fishery data indicated that Cornish stocks of monkfish had recovered sufficiently to allow sourcing to resume from this area, and the Cornish product is now sold as a speciality line alongside the imported products.

Tuna

Tuna is caught by long-line in the Indian and South Atlantic oceans by fishermen from countries such as the Seychelles and Sri Lanka. The factories supplying the canned tuna are Earth Island Institute (EII)-approved, but M&S has developed its own 'Dolphin Friendly' logo rather than subscribing to the EII logo licence. M&S is currently exploring potential new projects involving tuna fisheries and suppliers to further improve the sustainability of its products.

Swordfish

Having not sold swordfish for some years due to sustainability concerns, M&S identified the US Atlantic fishery as being sufficiently well-managed and began selling swordfish from this source in summer 2005. Fishing gear has been modified to reduce accidental capture of endangered marine turtles and a US government observer programme enforces standards. During the US closed season, M&S also sources from boats involved in the Project Tamar turtle conservation scheme in Brazil, to encourage their adoption of US fishery methods to protect turtles.

Rockfish

Rockfish (wolf-fish), a species rated as unsustainable in *A recipe for disaster*, was delisted from M&S's shelves in 2005.

Skate

Skates of the genera *Dipturus* and *Raja* have been on M&S's banned list for over five years, and the company has not stocked any skate for the past two years. Following a review in 2006 of the skate species being stocked by some other retailers, M&S has now added all skate species to its banned list due to the lack of management and scientific data available to assess the sustainability of each species and stock.

2.3.3 Aquaculture policies

The farmed seafood which M&S sells is predominantly salmon and tropical prawns, with some Atlantic halibut, sea bass, rainbow trout, tilapia and mussels. M&S also sells an organic range of farmed salmon, rainbow trout and prawns.

M&S has been working on improving aquaculture sustainability for many years and has consistently aimed to work above industry standards. Production of both farmed seafood and fishmeal must comply both with national regulations and with the stronger relevant M&S codes of practice. Producers are required to seek continual improvements to farming methods and to demonstrate a commitment to improving their local environment. The scheme is fully audited by approved third party inspectors or M&S processors, and maintains a central database of approved farms.

Non-marine components of fishmeal are obtained from sustainable sources and do not contain genetically modified (GM) ingredients. Sources of marine proteins and oils in fishmeal comply with the M&S policy on wild fish as well as with all EU legal requirements for levels of dioxins and polychlorinated biphenyls.

Salmon

In September 2006, M&S launched a new range of Atlantic salmon from five dedicated farms under its new Lochmuir™ programme. By the end of 2007, all M&S farmed salmon (fresh and ingredient – over 10,000 tonnes annually) will move over to being sourced from these farms, representing approximately £50 million per annum at ex-farm prices. With supplies coming from a smaller number of farms, M&S will improve its ability to apply and maintain strict standards.

The fish under this programme are reared on a diet unique to M&S, selected for high omega-3 levels, low levels of contaminants, freedom from artificial pigments, and fishmeal and oil content from sources that specifically exclude poorly managed stocks such as blue whiting. In addition, M&S is working with its suppliers to ensure that all feed comes from MSC-certified stocks by 2009.

The farms are RSPCA Freedom Foods-certified to ensure high welfare standards. For example, well-boats are used to transfer fish live to a shore-based processing facility, which avoids the practice of slaughter at sea and the difficulties of reducing animal stress in an uncontrolled environment. M&S's suppliers have also worked specifically on a number of initiatives to reduce the environmental impact of fish farming. For example, nets are checked more regularly to prevent escapes, and cage sites are

rotated after each season and the location left fallow for up to two years to allow site recovery.

It is M&S's intention that the standards set for salmon will be rolled out over all other farmed seafood species in the coming years.

Tropical prawns

The main suppliers of tropical prawns to M&S are based in Madagascar and Honduras. M&S regularly visits and audits its suppliers and believes that the concerns raised by the Environmental Justice Foundation (EJF) regarding tropical prawn farms do not apply to its suppliers. This view appears to have been confirmed, at least in the case of its Honduran supplier, by the BBC Four documentary *The price of prawns*.¹⁹

M&S claims that its codes of practice have led to the following high standards on its suppliers' farms:

- Mangrove trees are protected and reforestation programmes have been in place for several years.
- Local communities and agriculture have not been displaced, as farms are usually located on tidal estuaries or mudflats that do not support crops or housing.
- Jobs have been created in remote rural areas and farms provide drinking water, sanitation, medical facilities and education to previously deprived areas.
- Farms have been audited to the Ethical Trading Initiative (ETI) standards to ensure workers' rights are protected.
- Ponds are not restocked by catching wild prawn larvae, as this results in high bycatch of juveniles from other species due to the use of fine mesh nets; reduction of wild prawn stocks; and introduction of disease. Farms only use domestic brood stocks.
- Water quality is carefully monitored; water is filtered and is often cleaner on leaving the farm than on entering.
- Antibiotics are not used to increase growth rates or reproductive rates of prawns.

2.3.4 Support for sustainability initiatives

M&S has been working with the MSC since 1998, and co-operates with it on key projects and fundraising. Andrew Mallison, M&S's Seafood Procurement Manager, is a member of the MSC's Commercial Group. M&S sells MSC-certified, own-brand fish including, over the past 12 months, Alaskan salmon, Cornish mackerel, Western Australian rock lobster and New Zealand hoki. M&S is now working on improving supply chains for other MSC-certified fisheries, such as Alaska pollock, to avoid products from this fishery being shipped to China for defrosting, filleting, refreezing and shipment to the EU, incurring food miles and loss of quality.

Andrew Mallison has also been a member of the Scottish Executive's Ministerial Working Group on Aquaculture, developing environmental and regulatory standards for Scottish fish farming. He is also a member of the newly formed Scottish Executive's Sea Fisheries Advisory and Reference Group. M&S was also the only retailer to give evidence to the Royal Commission on Environmental Pollution for its report on the state of Europe's fisheries.²⁰

M&S is working with WWF and the National Federation of Fisheries Organisations on the 'Invest in Fish' initiative, with M&S's Sustainable Development Manager, Mike Barry, sitting on the steering committee. This initiative aims to tackle overfishing while protecting the needs of the differing communities that depend on

the sea: economic, social and environmental issues are addressed together. Based in south-west England, the project started in early 2004 and involves scientific research and consultations with all stakeholders such as local communities, environmental groups, the fishing and food industries, restaurant operators, sea anglers and retailers. The aim is to agree to recommendations by the end of 2006 to safeguard both fish stocks and the livelihoods that depend on fishing. M&S has donated £40,000 to help leverage £1.6 million of funding for Invest in Fish.

M&S also sponsors smaller research and restocking programmes. In 2002, M&S joined forces with Inverness College, Strathcarron, Scotland, to restock populations of wild salmon in local West Highland rivers – the first young, tagged fish from the programme returned from the high seas in 2004 as breeding adults.²¹ Early in 2005, M&S donated £2,000 to the National Lobster Hatchery in Padstow, Cornwall, to purchase new tanks and water-handling equipment. This initiative helped increase the hatchery's annual output of juvenile lobsters from 7,000 to 16,000, with the ultimate aim of increasing the quantities of lobsters landed in about four years' time. In 2006, a further £12,000 was donated to help fund additional staff costs required to manage the higher output of juvenile lobsters.²²

In June 2003, in partnership with its supplier Coldwater Seafoods and selected local Scottish fishermen, M&S stimulated the introduction of innovative haddock fishing methods to reduce the bycatch of cod and juvenile haddock. The work was carried out by industry bodies Seafish and Seafood Scotland, and was jointly funded by M&S, Scottish Enterprise and Coldwater Seafoods.²³ Initial observer trials indicated that cod bycatch could be reduced through more careful choice of fishing grounds and by rigging nets to take advantage of the fact that haddock try to escape swim upwards, whereas cod tend to swim down. M&S-contracted fishermen have successfully reduced the cod bycatch to less than 5% of the total catch, and these techniques will be applied to all the boats supplying M&S with Scottish haddock.²⁴

M&S jointly funds the MCS's **FISH**ONLINE website and provides the society with details of its research and policies.

In addition to its specific impacts on fish species, M&S is now considering the broader impacts of its seafood business on the environment. As part of its work to reduce its impact on the climate, cod from Iceland and wild salmon from Alaska are now frozen at source and transported by sea rather than air, and M&S has set a target to stop air-freighting tuna by the end of 2007. Research into freezing techniques is ongoing to reduce the need to air-freight haddock from Iceland.

2.3.5 Labelling and promotion of sustainable seafood

As part of its 'open and honest' labelling policy, M&S has extended the UK seafood labelling laws to include its processed seafood products. Labels on chilled products, such as plain and breaded fillets, tend to provide a more detailed catch location than required by law, along with the method used to catch the fish. M&S has recently introduced photographs and short biographies of individual suppliers to its labels. For example, labels reveal that the fresh uncoated haddock is supplied by Ólafur Björnsson, and is line-caught off Iceland, while M&S sardines are provided by a small fleet of day boats from Penzance and Mevagissey in Cornwall.

M&S currently provides detailed information about the sustainability of its seafood on its website, and plans to develop this site further for 2007.

M&S continues to promote sustainable seafood both publicly and within the industry. In January 2006, M&S launched its 'Look behind the Label' campaign to inform its customers about the sustainability initiatives it has developed throughout its business, including responsible fish sourcing. The campaign includes advertisements in all major UK newspapers, as well as full-length window posters and other information in stores.²⁵

2.4 Review of M&S's seafood policies

With 10 years of experience, M&S continues to lead the field in sustainable seafood procurement and to drive sustainability initiatives throughout the seafood industry. The retailer sets clear goals and communicates with an openness and honesty that are lacking in the pronouncements of most other supermarkets.

M&S's detailed policies and codes of practice are reflected in its products and in the information provided to consumers. It remains the only retailer to apply its policy consistently to every piece of seafood sold in its stores, including seafood used as an ingredient. M&S's new targets for reducing the impacts of fishing methods and of the transportation of seafood, along with its further improvements to its aquaculture standards, show that the retailer plans to maintain its leadership position for as long as possible.



**Driftnetting,
Mediterranean:**
Greenpeace
investigations at
sea reveal illegal
fishing practices.

© Greenpeace/Cobbing

WAITROSE

'Good food, honestly priced'



3.1 Waitrose's background

Waitrose started as a small grocery shop in Acton Hill, West London in 1904. Following its acquisition by the John Lewis Partnership in 1937, the first Waitrose supermarket opened in 1955.²⁶ The John Lewis Partnership now includes 181 branches of Waitrose in England, Scotland and Wales; 27 John Lewis department stores; several manufacturing concerns; and a farm. The company is owned by the workers rather than shareholders, and its 64,100 employees or 'partners' share the profits. The John Lewis Partnership turnover for 2005 was £5.76 billion, £3.34 billion of this being through Waitrose stores.²⁷

Quality, freshness, provenance and traceability of food are among Waitrose's prime concerns. The company's buyers source from British suppliers wherever possible and increasingly buy local produce from suppliers and small growers close to individual Waitrose stores. Waitrose claims that no other supermarket takes greater care over the quality, safety and provenance of the food sold in its shops, and these efforts have won Waitrose a wide selection of awards from both the industry and NGOs.

3.2 Waitrose's seafood policies – a history

Waitrose began work on improving the sustainability of its seafood almost 10 years ago under the guidance of specialist fish buyer, Jeremy Ryland Langley. When Greenpeace began research on supermarkets seafood procurement policies in 2004, Waitrose's policies were mentioned in its CSR reports, and were being explained in detail on its website.²⁸ Jeremy Ryland Langley showed considerable knowledge of the provenance and sustainability of all Waitrose's seafood, was well acquainted with the industry and was happy to clarify the company's policies further for *A recipe for disaster*. Waitrose's policies and the evidence provided of their implementation earned the retailer a score of 15 out of 20 in that report, placing it second only to M&S.

3.3 Waitrose's seafood policies – current

Waitrose continues to seek ways to improve the quality and sustainability of all its own-brand ranges of wild and farmed seafood. Waitrose won the Seafood Retailer of the Year (Multiple) 2005 at Seafish's Seafood Awards in March²⁹ and was runner up to Sainsbury's in the Seafood Retailer of the Year (Multiple) 2005 at the Retail Industry Awards.³⁰

As an ethical retailer, Waitrose has led the way in providing a sustainable seafood offer to its customers. It is the supermarket's policy to source all its fish from well-managed fisheries using responsible fishing methods, and it will delist species when necessary, based on the best and most objective advice available.

During the preparation of this report, Jeremy Ryland Langley told Greenpeace: 'The supply of fully traceable, sustainable seafood is vital to our business and therefore we take our commitment to help promote sustainable fish stocks in the world's oceans very seriously. It is our policy to buy all of our fish from well managed fisheries and fishing vessels using sustainable fishing methods. For this policy to truly work in today's climate of rising consumer demand, diminishing wild fish stocks, and issues of illegal, unreported and unregulated (IUU) fish, full traceability from catch to consumer is of vital importance and now forms part of our conditions of supply. If a new and potential supplier cannot demonstrate full traceability then we will not enter into a supply agreement.'

Waitrose specialist fish buyers regularly update Greenpeace on their latest initiatives and have shared their detailed codes of practice for aquaculture and catch specification sheets for each species that are provided to their suppliers.

3.3.1 Seafood and suppliers

Waitrose was the first major retailer to introduce fresh fish counters, and now has counters in all but 10 of its stores. Waitrose sells 55 different species of fish and shellfish, both farmed and wild-caught, from 25 different countries, obtained through its small, specialised UK-based (but not all UK-owned) suppliers.³¹ All Waitrose's fish are fully traceable to the source.

Waitrose has a dedicated processing unit at Caistor near Grimsby, which is owned by Sealord, a major supplier to the company. Sealord is jointly owned by the Maori people of New Zealand and the Japanese seafood company Nippon Suisan Kaisha (Nissui), and has its own fishing vessels based in New Zealand.³² It supplies Waitrose with approximately 40% of its fresh fish requirements, including Icelandic cod, haddock, plaice, lemon sole and New Zealand arrow squid.³³ Waitrose's other suppliers include New England Seafood for its exotic species, and Aquascot for all its 'Select Farm' and organic farmed salmon.

3.3.2 Wild seafood procurement policies

Over the past 10 years of implementing its sustainable procurement policies, Waitrose has reviewed every species sold with regard to stock levels, management and fishing methods. The retailer maintains a comprehensive 'banned' list and is now confident that it is sourcing all its seafood from the healthiest stocks available, with the possible exception of skate, monkfish and swordfish. While the team is reviewing its research for a final decision on the sourcing of these controversial species, it is now focused on ensuring that all seafood is caught using the most sustainable fishing methods available and is looking at other projects to increase the minimum size of its fish and reduce waste.

Waitrose now sources the largest range of line-caught fish in the UK and plans to continue increasing this range.³⁴ Although long-lining can create significant bycatch problems, long-line vessels that catch fish for Waitrose use various techniques to minimise bycatch, such

as using shorter lines; fishing closer to shore; setting lines at night; using streamers, buoys and acoustic scarers to deter seabirds; using specialised hooks to avoid catching turtles; and giving lines extra weighting to ensure that they sink quickly so as to prevent seabirds being hooked or tangled.

Since delisting New Zealand deep-sea cod (ribaldo) early in 2006, Waitrose will no longer source any fish caught by deep-water trawling. Waitrose also plans to stop buying any fish caught by beam trawl by the end of 2007. Waitrose has begun reviewing scallop dredging, although its current supplies do come from the better-managed Canadian fishery where dredging is limited to specific mapped areas.

Waitrose does not buy any fish caught using pair-trawling methods, due to concerns over the deaths of dolphins and porpoises in these nets. All of the wild-caught sea bass sold in Waitrose is line-caught from Cornish waters.

There are many issues surrounding the catching of wild warm-water prawns, such as habitat destruction and high levels of bycatch. In view of this, Waitrose does not buy any wild-caught warm-water prawns.

Examples of how Waitrose has dealt with the most controversial, often unsustainably sourced species follow, along with further initiatives that the company is undertaking to improve fishing methods. Details of policies for other species can be found on the Waitrose website.

Cod and haddock

Waitrose's cod and haddock have been sourced from the healthier and better-managed stocks around Iceland since 1999, and since April 2006 all fresh, smoked, and breaded cod and haddock have been caught by long-lines.³⁵ Trawled cod and haddock (less than 5% of the total) are currently only used in frozen products. The trawls used employ the most up-to-date net designs to reduce turbulence, minimise seabed damage and allow higher levels of escape by undersized fish. By the end of 2007, Waitrose plans to have its entire range of cod and haddock caught by long-lines.

Flatfish

As mentioned, it is Waitrose's intention by the end of 2007 to stop sourcing any fish caught by beam trawlers, due to their high fuel consumption and high levels of bycatch and damage to the seabed. Currently, all fresh plaice and lemon sole sourced by the retailer are caught in Iceland and the Faeroe Islands by inshore fisheries using a less destructive method known as Danish seining. By the end of January 2007, all breaded lemon sole and plaice sold in Waitrose will also be caught this way. Furthermore, Waitrose has increased the minimum weight of fresh plaice and lemon sole fillets to exclude immature fish. Quarter cut fillets from these large mature fish have replaced the small paired fillets, which were used for the production of breaded plaice and lemon sole.

Waitrose's Dover sole is currently caught mainly by Danish seine, with a small proportion caught by beam trawl; and brill and turbot are from the Cornish fishery, caught by gillnet (80–90%), line and beam trawl. These beam-trawled sources will also be phased out by the end of 2007. Waitrose also sells MSC-certified Pacific halibut, which is caught by long-line.

Coldwater prawns

All Waitrose's North Atlantic prawns come from two dedicated plants that process prawns caught by prawn trawlers using nets incorporating the Nordmore grate. This rigid grate set within the trawl directs fish toward an 'escape' opening at the top of the net, while allowing shrimp to pass into the cod-end, thus significantly reducing the bycatch of fish.

Tuna

Waitrose's fresh tuna is yellowfin tuna, caught by dedicated boats using pole-and-line or long-line to minimise bycatch. The tuna is from the Indian and Pacific Oceans, as well as from fisheries in the south-west Atlantic covered by the International Commission for the Conservation of Atlantic Tunas.

Waitrose own-brand tinned skipjack and yellowfin tuna is also caught by pole-and-line or long-line, and is labelled: 'Waitrose tuna fish is caught using only fishing methods which do not harm dolphins or other marine mammals.' Waitrose monitors mercury levels in tuna closely, and if there is any evidence of unsafe levels will stop sourcing from that area.

New Zealand species

Waitrose sells a small range of line-caught New Zealand fish including sea bream, tarakihi and red snapper, and has also found a sustainable supply of line-caught arrow squid.

Swordfish

Waitrose is currently reviewing its Brazilian source of swordfish, as it is concerned about the health of stocks and the current level of turtle bycatch. If the fishery can be convinced to adopt S-hooks on its long-lines to stop bycatch of turtles (with support and funding from Waitrose and its suppliers), Waitrose will continue to source from and support the fishery; otherwise swordfish will be removed from sale by spring 2007. Waitrose is already considering other species that would make a good alternative to swordfish, such as mahi mahi.

Monkfish

Waitrose currently sources monkfish from various areas depending on the time of year. Monkfish fillets generally come from the Bristol and English Channels, while tails and whole fish are sourced from Scotland. When these areas are out of season, monkfish is sourced from Iceland and the Faeroe Islands. Waitrose's monkfish is currently predominantly trawl-caught, with some caught by gillnet or beam trawl, and a small, more sustainable, line-caught supply from Iceland.

Waitrose is aware of the concerns surrounding the European monkfish fisheries and is consulting with scientists at the North Atlantic Fisheries College for advice on monkfish stocks and the scope for management improvements to the fishery. There is currently some debate about stock levels of monkfish around the UK. ICES lists a variety of problems associated with the Scottish fishery, including the fact that there is insufficient data to be able to determine the state of the stock, and that quota restrictions are not adequately regulating the fishery.³⁶ Additionally, ICES reports that stocks in the both the Bristol and English Channels are being fished at too high a level to be considered as following the precautionary approach.³⁷ However, ICES indicates that there is some evidence

that stock levels have improved since 2000 and quotas have actually been increased.

Skate

While all other supermarkets, except for Tesco and Morrisons, have delisted all species of skate under their sustainability policies, Waitrose continues to source four smaller species from UK boats: starry, spotted, cuckoo and thornback ray. The first three species are less depleted than other skate species, although still unmanaged and vulnerable to overfishing. Thornback ray is listed on the World Conservation Union (IUCN) Red List as Near-Threatened.³⁸

In an attempt to differentiate its skate sourcing policy from those of other supermarkets, Waitrose now labels all these species as 'ray'. (In Europe, the long-nosed rajid species are colloquially known as skates and short nose species as rays, and this tends to be reflected in the common names. However, the correct common name for the Rajidae family is skate; the term ray should be reserved for the other elasmobranch families of Myliobatidae (eagle rays), Dasyatidae (sting rays), and Torpedinidae (electric rays).³⁹)

Waitrose has met with the Marine Conservation Society, the Shark Trust, and representatives of the skate industry to discuss possible ways to improve the fishery. In partnership with the Marine Conservation Society and the Shark Trust, Waitrose is funding the production and distribution of a skate and ray identification card, including information on minimum and maximum landing sizes, in order to help fishermen, anglers and producers avoid the most vulnerable and overfished species.

Waitrose should be commended for developing these initiatives and dialogue between the various stakeholders. However, Greenpeace feels considerable concern at the lack of urgency shown by the industry and EU fisheries management bodies in addressing the problems of skate fisheries, and the shift by some retailers (eg Waitrose and Morrisons) to sourcing a smaller range of skate species, which will place additional pressure on these vulnerable unmanaged species if other retailers follow.

3.3.3 Aquaculture policies

Waitrose's fish buying policy supports the development of sustainable aquaculture and the retailer is committed to securing this goal by working in partnership with the Soil Association, the MSC and suppliers (see section 3.3.4).

Waitrose's ongoing commitment to high standards of animal welfare and sustainable fishing methods has won it the title of Food Retailer of the Year at the RSPCA Alternative Awards 2005,⁴⁰ and the Compassion in World Farming Food Retailer of the Year Award for 2003/04 and 2005/06.⁴¹

Uniquely, Waitrose does not buy any farmed seafood on the open market. Long-term working partnerships have been established between Waitrose and the farmers – these allow for long-term planning and early adoption of practices that lead to improved quality and sustainability of the farming operation. Waitrose is very aware of the environmental impact fish farms can have if they are inappropriately sited and managed. Waitrose has raised the standard of fish farming through the introduction of its 'Select Farm' scheme, which it claims has some of the highest standards in the world for both animal welfare and environmental protection.

Waitrose is committed to the development of organic standards

and is the market leader in organic fish, with the widest range, fully certified by the Soil Association. Waitrose and two dedicated suppliers were instrumental in the development of organic standards for salmon and trout, and Waitrose was the first UK supermarket to sell organic salmon and organic brown trout.

Waitrose sells a wide range of farmed fish from more sustainable aquaculture systems. This range includes salmon, brown trout, rainbow trout, barramundi, warm-water prawns, carp, rope-grown mussels, oysters, halibut, sea bass and sea bream.

Salmon

All the salmon sold in Waitrose comes from its Select Farm scheme. Select Farm sites are situated in clean oceanic waters far from any natural salmon rivers – so there is no impact either from or on wild salmon populations. Strong tidal flows help keep the seabed clean and also make the fish lean and fit from swimming in the current, resulting in firmer flesh. Select Farm salmon are stocked at much lower densities than industry standards – around 15kg per m³, compared to the industry standard of 20–25kg per m³.

To ensure the farms have limited impact on the environment, submerged cameras are used to watch the fish feeding. This allows the farmer to ensure that little, if any, feed is falling on to the seabed, thereby minimising the potential for pollution. On a six-monthly basis the farmer will arrange for a seabed survey to assess the richness of the environment. Waitrose works hard with its supplier to ensure sites are situated in appropriate locations, such that they can actually result in an increase in other marine species, including economically important prawns, clams, crabs and rockfish.

Trout

Waitrose's Select Farm rainbow trout are reared in earth- and gravel-bottomed ponds fed by the waters of the Hampshire Avon on Lord Radnor's Longford estate in Wiltshire. As with salmon, trout are stocked at considerably lower densities than industry standards – around 29kg per m³, compared to 40–50kg per m³.

Barramundi

In April 2006, Waitrose became the first supermarket to stock New Forest barramundi. Despite its reputation as one of the world's greatest food fish, it has until now been difficult to secure a consistent and sustainable supply of barramundi. New Forest barramundi is farmed by supplier Aquabella in a recirculating, land-based system.⁴²

Sea bass and sea bream

Waitrose sells farmed sea bass and sea bream which have Label Rouge certification – a French system that guarantees the highest quality and gourmet appeal.

Prawns⁴³

Large tropical prawns are reared and sourced from farms in the Gulf of Fonseca in Honduras, Mahajanga in Madagascar, and the Gulf of Guayaquil in Ecuador. Each of these operations is fully integrated with its own hatchery, farm and factory. No wild-caught larvae are used on the farms, only hatchery-raised larvae. Farmed organic tropical prawns are from farms on Isla Puna in the Gulf of Guayaquil. The organic farms are also fully integrated and certified throughout the entire production process, including the hatchery, farm,

processing factory and feed mill. Waitrose has a close relationship with its prawn farms, and visits them regularly to monitor their environmental and social conditions.

The farms in Honduras and Madagascar have been built on the upper plains of salt flats between the bends of rivers in an effort to minimise disturbance to the mangrove ecosystem. Over time, mangrove areas have both developed naturally and been artificially introduced along the banks of the farm ponds and watercourses. The once barren salt flats now house a varied flora, and a fauna ranging from pelicans to iguanas.

Prawns are stocked at low density and rely on both natural food in the ponds and feed supplements (fishmeal, soya bean meal, wheat flour, yeast powder, squid meal, vitamins and minerals) – these contain no antibiotics or added pigmentation (either synthetic or natural).

Waitrose claims that the construction of these prawn farms in Honduras and Madagascar has created many jobs in areas where previously opportunities were scarce and poverty was high. Each farm has a programme to improve health, education, infrastructure and environmental conditions in the surrounding communities.

Mussels and oysters

Waitrose common (blue) mussels are grown on ropes suspended in tidal sea lochs around Shetland and Orkney. The farms are sited in remote locations away from housing and industry to ensure pristine water quality, and the mussels feed on natural plankton. All relevant environmental bodies were consulted prior to the building of Waitrose's mussel farms to ensure the protection of rare species and sensitive habitats.

Waitrose's organic New Zealand green mussels are farmed in the Pacific Ocean. Oysters are grown in Scottish hatcheries in mesh bags.

3.3.4 Support for sustainability initiatives

Waitrose actively contributes its knowledge and experience on sustainable seafood sourcing to NGOs and working groups to assist the further development of sustainable buying policies within the wider seafood industry. Jeremy Ryland Langley sits on three of Seafish's working groups – the White Fish Advisory Committee, the Sustainable Fishing Advisory Committee and the Common Language Committee. Jeremy Ryland Langley has recently joined the steering committee of the Invest in Fish initiative as co-retail representative with M&S (see section 2.3.4 for details). Waitrose specialists are also asked to present at conferences, such as the first Chatham House IUU Fishing Update and Stakeholder Consultation Meeting in May 2006.⁴⁴

Waitrose is committed to organic aquaculture and has recently formed a partnership with the Soil Association, the MSC, and Aquascot, the company's salmon supplier, to develop certified sustainable sources of fishmeal and oil for organic farmed fish.⁴⁵ The partnership's goal is that by 2010 all fishmeal and oil in Soil Association-certified organic fish will come from MSC-certified sources.

Waitrose supports and promotes the MSC and sells MSC-certified Cornish mackerel, Pacific halibut, Alaskan salmon, Western Australian rock lobster, Thames herring, Burry Inlet cockles and South African Cape hake, with plans to increase the MSC range as more fisheries are certified.

As described above (section 3.3.2), Waitrose has met with the Marine Conservation Society, the Shark Trust and representatives of the skate industry to discuss possible ways to improve the fishery.

3.3.5 Labelling and promotion of sustainable seafood

Wherever possible, Waitrose labels its seafood with more details than are required by UK seafood labelling laws. In cases where the seafood is from a single source, fish counter labels tend to show details of country or region of catch and the fishing method used, for example line-caught Icelandic cod or rope-grown Scottish mussels. Further details of seafood sources and the fishing methods used are provided on the company's website.

Waitrose publishes articles on fishing and sustainability in both the online and print versions of its magazine *Waitrose Food Illustrated*,⁴⁶ and its online recipes for seafood include a good range of species to encourage consumers to try alternatives to the standard favourites.⁴⁷ Its MSC-certified seafood lines are clearly displayed and promoted at its fish counters, and a leaflet summarising the company's policies is available at the counters.

During Seafood Week 2005, a national event promoted by Seafish, Waitrose relaunched its sustainability campaign with a promotion of its more sustainable seafood range – in order to raise awareness of the issues surrounding sustainable seafood and to encourage its customers to broaden their seafood tastes. Waitrose has since produced a TV advertisement highlighting its sustainable seafood policies, and the retailer ensures that all its achievements are reported to the media.

3.4 Review of Waitrose's seafood policies

Waitrose is certainly a leader in the sustainable sourcing of seafood. Over the past 10 years of implementing its sustainable procurement policies, Waitrose has reviewed every species sold with regard to stock levels, management and fishing methods. The retailer maintains a comprehensive 'banned' list and is now confident that it is sourcing all its seafood from the healthiest stocks available. Waitrose has considerable knowledge of the provenance of its seafood and of sustainability issues, and openly promotes its procurement policies. Waitrose supports sustainability initiatives for wild-caught seafood and is striving to improve aquaculture standards with its work on organic fish and shellfish farming.

Within the wide range of species sold by Waitrose, its customers are buying more sustainably sourced seafood, even if they are not individually aware of all the issues, and Waitrose's work has significantly raised the profile of sustainable seafood procurement within the seafood industry, particularly over the past year.



Soft coral
(*Alcyonium palmatum*),
Viking Bank, North Sea:
Greenpeace is calling for
this area to be protected as
a marine reserve.

SAINSBURY'S

'Try something new today'



4.1 Sainsbury's background

Sainsbury's was founded in 1869, with the first shop opening in Drury Lane, London.⁴⁸ J Sainsbury plc is now a leading UK food retailer, comprising of: Sainsbury's Supermarkets and Sainsbury's Local; Bells Stores, Jacksons Stores and JB Beaumont convenience stores; Sainsbury's Online; and Sainsbury's Bank. At the end of the 2005/06 financial year, J Sainsbury plc had 752 stores and about 153,000 employees, and its annual turnover was £17.3 billion (14.7% of the market share).⁴⁹ The retailer carries over 30,000 product lines in larger stores, about 50% of which are its own-brand goods, and has over 1,400 direct suppliers worldwide. Sainsbury's claims to focus on quality, choice and fair prices.

4.2 Sainsbury's seafood policies – a history

Sainsbury's has taken pride in its seafood for some time. It won the Seafood Retailer of the Year (Multiple) award at the 2005 Retail Industry Awards for the second year running,⁵⁰ and has been shortlisted for the 2006 awards. It is one of the few supermarkets to have a clear fish procurement policy in its yearly CSR reports.⁵¹ Sainsbury's pledged in March 2003 that all its wild fish would be sourced from sustainable fisheries by 2010, but it has been unable to achieve the interim levels required to meet this goal. Sainsbury's attributes this partly to the fact that so few fisheries have been certified to MSC standard and partly to the difficulty of changing the buying habits of consumers.

At the time *A recipe for disaster* was being written, Sainsbury's was undergoing a major review of its seafood sourcing policies, and could only provide a summary of the areas that were being addressed. Sainsbury's had set some solid goals with regard to sourcing from sustainable fisheries, but had few sustainability policies on aquaculture, and did not provide enough sourcing details on the 13 most controversial, often unsustainably sourced species or groups of seafood sold in its supermarkets to back up its sustainability claims. Sainsbury's earned a mediocre but passable score of 10 out of 20 for its policies, which placed the retailer third in the league table of supermarkets, albeit a significant way behind Waitrose in second place.

4.3 Sainsbury's seafood policies – current

Following completion of its review early in 2006, Sainsbury's prioritised its work on sustainable seafood procurement. Sainsbury's has produced a thorough Fish Sustainability Strategy (see Table 4.1) for its entire range of own-brand wild-caught and farmed seafood, and has shared this in detail with Greenpeace.⁵² The strategy includes Sainsbury's own seafood assessment system, developed with the support of the Marine Conservation Society and its suppliers, detailed codes of

practice for both wild and farmed seafood, and questionnaires for all its seafood suppliers.

Table 4.1.
The goals of Sainsbury's Fish Sustainability Strategy

- 1. Fishing impacts and systems** – to understand the environmental impacts of our seafood sourcing activities, and establish systems that enhance the positive impacts.
- 2. Sustainable fisheries** – to support and encourage the development of fisheries demonstrating a clear commitment to achieving long-term sustainability, as well as driving best-practice sourcing methods for wild-caught and best-practice management for farmed seafood.
- 3. Supplier involvement in R&D** – to support suppliers who participate in research and long-term fisheries management planning.
- 4. Legal compliance** – to buy fish only from sources that operate in a legal, open system that respects international laws and standards as a minimum.
- 5. Customer information** – to provide comprehensive and clear customer information on the origins of the seafood, enabling customers to make the most informed choices possible.
- 6. Widen customer repertoire** – to offer customers a wide range of safe, healthy, fresh and tasty seafood products from sustainable fisheries.
- 7. Innovative suppliers** – to work with suppliers who share both our fish sourcing goals and our vision for innovation.
- 8. Stakeholder engagement** – to engage with stakeholders who share our objectives relating to sustainable fish sourcing, and who are willing to collaborate with us to achieve these. To communicate to all relevant stakeholders about the actions we are taking to improve the sustainability of our seafood sourcing activities.

4.3.1 Seafood and suppliers

Sainsbury's sells a wide range of seafood products from over 320 fish counters as well as under its own and other brand pre-packed, frozen, tinned, and ready-meal ranges. Sainsbury's holds 22.3% of the UK market share of fresh fish.⁵³

Sainsbury's sustainability, technical and trading teams all work to drive the Fish Sustainability Strategy forward, and demonstrate a good level of knowledge about the issues surrounding sustainable seafood procurement. The internal Steering Group ensures that Sainsbury's seafood policy is understood and promoted in all parts of the business, as well as externally.

Sainsbury's seafood is primarily sourced through national suppliers such as Young's Bluecrest and New England Seafood, both firms which have engaged with Greenpeace in its sustainable seafood campaign. Sainsbury's also uses smaller local suppliers, such as

Interfish and Southwest Seafoods in south-west England, for its range of regional products. All Sainsbury's suppliers have agreed to abide by an action plan to improve the sustainability of their supplies, and to participate in research initiatives (see section 4.3.4). Sainsbury's suppliers will meet annually at a seafood suppliers' forum to promote exchange of information, values and goals.

Sainsbury's continues to maintain its 'Fish Integrity Group', made up of internal stakeholders, suppliers and external experts, which is intended to support Sainsbury's in finding solutions to technical and operational challenges leading to improved seafood sustainability.

4.3.2 Wild seafood procurement policies

Sainsbury's has recently assessed its entire range of seafood. Species and sources that are considered by Sainsbury's to be low-risk and for which the situation is unlikely to change are reassessed at least every three years, while medium- to high-risk species are reassessed more often. Sainsbury's aims to continue to increase the range of low-risk, more sustainable options, while working with suppliers to implement action plans for medium- to high-risk species. Sainsbury's plans to extend this assessment policy to include all fish caught for use in pet food, nutritional supplements and ingredients sold under its brand, as well as to the fishmeal used to feed its farmed seafood.

Sainsbury's code of practice prohibits fishing methods such as bottom trawling on sensitive environments, deep-water netting, pair trawling for sea bass, and any illegal methods, and specifies that bycatch reduction methods must be used for other gear types.

Sainsbury's currently stocks one of the widest ranges of seafood species, providing more sustainable choices to its customers than most other supermarkets, including the widest range of MSC-certified products. It currently has over 20 own-label MSC-certified products on sale, including fresh and processed products from Thames Blackwater herring, New Zealand hoki, Alaska salmon, South African Cape hake, and Pacific cod. There are plans in place to extend this range further, with at least five more lines currently under development.

By autumn 2006, Sainsbury's will have stopped selling any fresh fish caught in peak spawning season, offering frozen as an alternative, and will promote seasonal sourcing of fish to ensure fish are being caught when they are most plentiful and not spawning. As an additional way to reduce pressure on stocks, Sainsbury's is also looking at ways to reduce wastage of fish once it reached its stores.

Sainsbury's has committed to stop selling all high-risk ('red-rated' in Sainsbury's assessment) fish by the end of 2006,⁵⁴ either by switching supplies to less depleted stocks caught by less destructive fishing methods, or by delisting species altogether. Sainsbury's has already removed the most high-risk species (all species of skate and dogfish) from its stores earlier in 2006.⁵⁵ The removal of skate required some consideration on Sainsbury's part, as it was a very popular regional fish with a loyal customer base and worth £650,000 in annual sales.⁵⁶

Cod and haddock

Sainsbury's does not stock any North Sea cod in its own brand ranges. Cod and haddock sold on Sainsbury's fish counters are now

trawl- and line-caught from Icelandic waters, and Sainsbury's plans to move the fresh range to 100% line-caught. Sainsbury's other ranges still include cod from other less sustainable European stocks. Sainsbury's was the first supermarket to introduce MSC-certified Pacific cod to provide a more sustainable alternative to, and reduce the impact on, Atlantic cod stocks.⁵⁷

Marlin and swordfish

Swordfish and marlin availability in stores had already been reduced under Sainsbury's older policy by discontinuing pre-packed ranges, but these species are still sold at selected fish counters when in season. Swordfish is primarily sourced from the US fishery – whose stocks are improving and well managed. Sainsbury's has concerns about the small quantities (up to 15% depending on time of year) which it sources from the Indian Ocean – fish from this source will be removed from sale before the end of 2006 unless the fishery's sustainability improves. Similarly, Sainsbury's is looking for ways to improve the sustainability of its current supply of marlin.

Tuna

Fresh yellowfin tuna is caught by pole-and-line or long-line in the Indian and Pacific Oceans. Skipjack and yellowfin for tinned products can also be purse-seined to EIU 'Dolphin Safe' standards.

Monkfish

Sainsbury's sources Brazilian and American monkfish (see section 2.3.2) to reduce pressure on recovering European stocks.

Other species of concern

Greenpeace has concerns about the sourcing of some other controversial species, such as plaice. Sainsbury's has agreed to provide further details concerning its sourcing of these species and to discuss its plans to improve the sustainability of their sourcing.

4.3.3 Aquaculture policies

As with Sainsbury's wild-caught seafood, all its farmed seafood is being assessed against the full range of sustainability criteria – from feed sourcing, to welfare, to environmental impacts. Sainsbury's farmed range includes Atlantic salmon, sea bass, sea bream, rainbow trout, tilapia and tropical prawns. Sainsbury's currently stocks some organic farmed fish and is looking for opportunities to expand this range.

Sainsbury's has now developed detailed codes of practice for all its farmed seafood. The retailer is currently focused on building a dedicated base of farms to supply its salmon and prawns, and is putting in place the changes needed to ensure that every supplier achieves best practice in all aspects of farming. The Sainsbury's team has visited the innovative Loch Duart salmon farm in Scotland to gain an understanding of what constitutes best-practice salmon farming, and of how the practices in question can be incorporated into mainstream salmon farming. Sainsbury's has also worked with Johnson's Sea Farms for a number of years, providing them with business development support and guidance to assist the launch of their farmed organic cod.

Sainsbury's is an active participant in the ETI review of social and

welfare issues in the prawn industry. The company only sources farmed prawns from well-established sites, not from farms active in mangrove forest cutting areas.

4.3.4 Support for sustainability initiatives

Sainsbury's was the first retailer to support the MSC in 1998, and launched its first MSC-certified product that year. Sainsbury's promotes the MSC label through its CSR website, pack labelling information, on-pack promotions, press releases of new products, and other publicity initiatives. Sainsbury's continues to support the MSC's Tuna Conservation Project, which aims to encourage the tuna industry to adopt sustainable fishing practices, and the company is considering further MSC projects for funding. Support of the MSC is a key element of the retailer's sustainability strategy, and the MSC has used Sainsbury's policy internationally to demonstrate the market benefits of MSC certification, and to influence important fish-producing countries towards greater adoption of MSC certification.

Sainsbury's has introduced the Seafish Responsible Fishing Scheme as entry-level criteria for UK vessels wishing to supply its supermarkets, although it will take time for all vessels to be certified as the scheme is still in its infancy. The retailer will work to ensure that suppliers outside the UK are using similar basic standards for maintaining their vessels and ensuring the quality of their catches. Vessels supplying Sainsbury's will also be required to participate in relevant research programmes to improve the sustainability of fisheries practices and management. Sainsbury's aims to ensure that by the end of 2006 at least 95% of its suppliers will be participating in research to source seafood more sustainably.⁵⁸

Sainsbury's has also formed a partnership with the Marine Conservation Society and is considering providing financial support to its mariculture programme to establish sustainable practices for farmed fisheries.

4.3.5 Labelling and promotion of sustainable seafood

Sainsbury's fresh and own-brand processed seafood products are currently labelled according to UK seafood labelling laws only. However, on-pack, point-of-sale and counter labelling will be improved as part of the new Fish Sustainability Strategy to ensure customers have a better understanding of the sustainability of their seafood. This enhanced labelling will

include more details of where and how seafood has been caught or farmed. For example, fish counter labels are beginning to show the landing area, and by the end of 2006, farmed salmon labels will indicate specific farms. All MSC-certified products are already clearly labelled with the MSC logo on the front of the pack or on the price tags at fish counters. On Sainsbury's corporate website a dedicated fish page is being developed, which will provide case studies and more detailed information on the sustainability of Sainsbury's seafood.

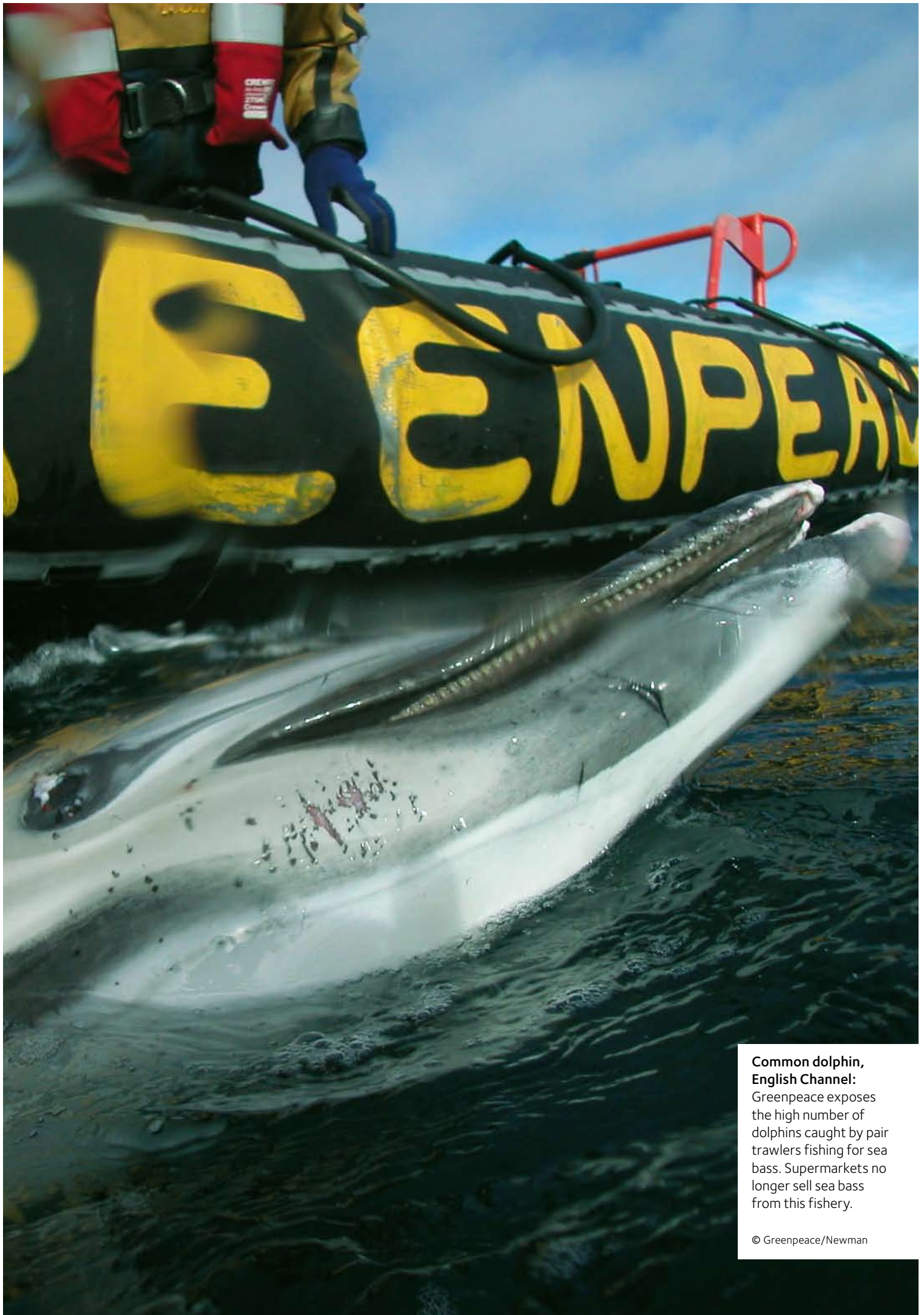
Sainsbury's continues to build consumer awareness of fish sustainability issues and to promote the availability of sustainable alternatives to traditional favourites. The company aims to promote seasonality by encouraging customers to make best use of species when they are plentiful, through its rolling monthly 'New in Season' promotion in stores, recipes and cooking tips available in stores, and through its website and magazines.

From October 2006 a revamped sustainability and product knowledge training package will be delivered to staff on the 320-plus fish counters to enable them to provide up-to-date information to customers. Sainsbury's aims to roll this training out to 97% of fish counter staff by March 2007.

4.4 Review of Sainsbury's policies

The overhaul of Sainsbury's seafood policies in both the wild-caught and aquaculture sectors is one of the more exciting changes within the industry over the past year. Sainsbury's has set clear goals for moving towards 100% sustainable seafood procurement, and has spent time and money supporting sustainability initiatives and promoting better alternatives to customers. Sainsbury's sustainable seafood team has engaged thoroughly with all parts of the Sainsbury's business, both internally and with suppliers, to ensure full roll-out and promotion of the company's policies. Sainsbury's provides its customers with a wide choice of more sustainably sourced species, and has proven its commitment by removing some key unsustainable species from its supermarket shelves.

With such well-thought-out and extensive policies and implementation plans, it should take little time for Sainsbury's to become one of the best suppliers of sustainable seafood. More importantly, the volume and range of seafood that Sainsbury's currently offers means that its policies, if successfully implemented, will have a strong influence on the sustainability of the industry as a whole.



Common dolphin, English Channel:
Greenpeace exposes the high number of dolphins caught by pair trawlers fishing for sea bass. Supermarkets no longer sell sea bass from this fishery.

© Greenpeace/Newman

THE CO-OP



5.1 The Co-op's background

The Co-operative movement began in 1843 in Rochdale, Lancashire, when 28 workers decided to set up a co-operatively owned, co-operatively run shop that would trade honestly, treat customers fairly, and give them a chance to become members with a democratic right to have a say in the business. These founding principles underpin the trading philosophy of the Co-operative Group today.⁵⁹

The Co-operative Group now encompasses a wide range of businesses including food retailing, banking, insurance, funeral directors, travel agents, pharmacies farms and property. These businesses employ over 68,000 people with a group turnover of £7.8 billion in 2005/06.⁶⁰

As of January 2006, there were 1,713 Co-operative Retail (Co-op) stores throughout the UK, employing almost 44,000 people, with stores located in many communities not served by other retailers. Stores operate under two main fascias – Co-op Welcome for the smaller convenience stores, and Co-op Market Town for the larger supermarkets. The primary aim of the Co-op is to be the UK's preferred community food retailer. The Co-op has over 4,000 own-brand products, with food sales in 2005/06 of £3 billion.⁶¹

5.2 The Co-op's seafood policies – a history

Prior to October 2005, the Co-op had a variety of ethical and environmental policies on sourcing from the marine environment, and covering products from food through to cosmetics. However, none of these policies had been brought together under one publicly available sustainable fish sourcing policy. Despite lack of a public policy, additional written information provided by the Co-op in response to the first draft of *A recipe for disaster* showed that the Co-op had been engaged with the issues of seafood sustainability for some time, particularly with regard to its level of involvement with research and its support for sustainability initiatives. Unfortunately, the range of unsustainable seafood still being sold by the retailer, and the lack of sourcing detail provided for the report, meant that the Co-op scored only 7 out of 20, placing it fourth in the league table of supermarkets, behind Sainsbury's.

5.3 The Co-op's seafood policies – current

The Co-op now has a one-page Fish Sourcing Policy specifically for food product lines, which is available on request. In addition to a specific policy on seafood, the Co-op still has policies on the sustainable use of marine resources throughout all arms of its business, including jewellery and cosmetics. However, on the Co-op website these policies, along with parts of the Fish Sourcing Policy, remain scattered under various topics on sourcing and animal

welfare.⁶² In addition to these policies, the Co-op Bank continues not to invest in any business whose core activity contributes to the unsustainable harvest of fish.⁶³

The Co-op's policies are regularly reviewed and assessed against a range of information from scientists and NGOs, and it continues to engage with Greenpeace to elaborate on these policies. Since the publication of *A recipe for disaster*, the Co-op has delisted some seafood species and continues to review sources and fishing methods for other species.

5.3.1 Seafood and suppliers

As the focus of the Co-op is on the top-up sector, and its stores are mainly small, community-based outlets, it has limited opportunities to sell fresh fish. Fresh fish counters are located within a relatively limited number of the larger stores. The majority of the seafood sold by the Co-op is pre-packed chilled seafood from Young's Bluecrest, and the Co-op's own-label and other brands' frozen and ready-meal ranges. The Co-op also carries its own-label tinned fish as well as the common brands. The Co-op plans to develop its own-brand range of fresh pre-packed seafood in the near future.

The Co-op claims that it only works with suppliers that are able to demonstrate the highest levels of good practice, sourcing from well-managed fisheries and actively avoiding vulnerable species.⁶⁴ The Co-op only buys fish for which the origin and catch method are known. All suppliers are subject to regular audit and inspection. The Co-op is working closely with its main supplier Young's Bluecrest to improve the sustainability of its seafood.

5.3.2 Wild seafood procurement policies

The Co-op's policy covers all its ranges of own-brand seafood. All own-brand products are sourced from approved suppliers that have been audited by members of the Co-op's quality assurance team, who work closely with the fish buyers to resolve any issues identified in this process. The review process for new product lines considers key supplier performance details, the origin of the seafood products being sourced and parameters such as stock status, catch method, and catch area. This information is then used to inform the buying process.

The Co-op does not knowingly buy illegally caught fish and purchases all fish within a size specification, to discourage the catching of undersized fish. Regulatory bodies are allowed free access to any Co-op-held information which could help in monitoring fish sources.

Although the Co-op claims that it specifies the use of selective fishing techniques designed to minimise their effects on other non-target species and marine habitats, it has only provided details of catch methods for species commonly associated with cetacean (whale and dolphin) bycatch: tuna (see following list) and sea bass. The Co-op does not sell wild sea bass due to concerns about dolphin

bycatch associated with pair trawling. Sourcing details of the most controversial, often unsustainably sourced species currently and formerly sold by the Co-op follow:

Cod and haddock

The Co-op recognises the decline in stocks of cod and haddock, and is increasingly sourcing these species from the relatively sustainably managed Icelandic waters. The remaining supply is from Norwegian or Faeroese waters. The Co-op sells no North Sea cod in its own-brand ranges from fresh to frozen, but has been unable to confirm this for other brand ranges.

Dover sole

Dover sole is not currently sold under Co-op or other brands. However, the Co-op states that if Dover sole is reintroduced it will be from approved fisheries using cetacean-friendly nets.

Skate and dogfish

In January 2006, the Co-op announced to Greenpeace that all skate and dogfish had been delisted from its stores.⁶⁵

Tuna

Currently all Co-op own-brand tuna is tinned skipjack tuna – the species best able to cope with the current high level of pressure on tuna stocks worldwide. About 80% of this skipjack is caught by pole-and-line in the Indian Ocean and 20% is caught by long-line off Thailand. The Co-op's own-brand tuna is certified by the EIU, and is now being labelled with the EIU Dolphin Safe logo. The Co-op also sells other brand skipjack and yellowfin tuna. Although the Co-op currently sells no fresh tuna, it may stock fresh yellowfin in the future.

Salmon

The Co-op sells only farmed, not wild, Atlantic salmon. Co-op tinned salmon is Pacific salmon from Alaska and Canada, and a proportion of this is clearly labelled MSC-certified salmon.

Other species of concern

The Co-op has provided no evidence of sustainable sourcing of European hake, Atlantic halibut, monkfish, or plaice, as these species are not sold under its own brand.

5.3.3 Aquaculture policies

All the Co-op's farmed fish is produced to 'stringent codes of practice and product specifications detailing every aspect of production, from the sourcing and type of feed through to veterinary care and harvesting.'⁶⁶ The Co-op only sells salmon from

select farms in Scotland and Ireland, and rainbow trout (including organic) from a farm in southern England.

Animal welfare is a priority issue for the Co-op, and although this is not specifically a sustainable seafood issue, the Co-op's commitment to it does ensure better standards of fish farming that lead to healthier fish and a lower impact on the environment. The Co-op is extending the RSPCA's Freedom Food accreditation across its own-brand of meat, poultry and fish, wherever defined standards exist, and in collaboration with the RSPCA, is developing farm animal welfare standards in new areas and higher standards in existing areas. A Freedom Food frozen salmon fishcake has been launched in the Co-op's 'Truly Irresistible' range.

The Co-op and Waitrose were the first national retailers to require all their farmed fish to be humanely stunned prior to slaughter and processing. The Co-op is now involved with industry representatives and universities in the design and testing of equipment to facilitate the electrical stunning of saltwater fish.⁶⁷

The Co-op is working with its suppliers to ensure that all fishmeal fed to both farmed fish and land-based farm animals is obtained from sustainable sources.⁶⁸ Where possible, the Co-op specifies that fishmeal should incorporate bycatch and appropriate fish-processing waste, to help reduce fisheries wastage. Its fishmeal suppliers are also developing alternative protein ingredients, such as vegetable-derived proteins including non-GM soya, and are working to effect a gradual reduction to more natural levels of carotenoid pigments (added to fishmeal as a dietary supplement and to colour farmed salmon flesh). Ultimately the Co-op aims to remove fishmeal from all its land-based animal feed and is working with major suppliers to achieve this goal.

Tropical prawns are sourced from well-established farms in Indonesia and Ecuador. Farms in areas of mangrove depletion are not used. The Co-op is also an active member of the ETI which sets standards for the living and working conditions of suppliers' employees. In fact, the Co-op was a founding member of the ETI and participated in the pilot programme which considered social and welfare issues within the tropical prawn farming industry.

5.3.4 Support for sustainability initiatives

The Co-op has been a member of the MSC since 1998 and stocks some MSC-certified products, including a range of tinned Alaskan salmon. With the recent certification of several Alaska pollock fisheries, the Co-op is identifying opportunities to have existing products that use Alaska pollock labelled as MSC-certified. It is also working with the Canadian salmon fishery to promote MSC certification, and has discussed the certification with representatives of several tuna fisheries.

The Co-op supports the Convention on International Trade in

Endangered Species of Wild Fauna and Flora (CITES) as an essential instrument for the safeguarding of species which are threatened by international trade. Throughout its product ranges, the Co-op specifically avoids products or ingredients taken from endangered species. In particular, the Co-op does not sell items made from shells or corals taken from the seabed, or cosmetics containing whale products, and Co-op pet food does not contain meat from endangered species.

The Co-op continues to be involved in research initiatives on aquaculture (see section 5.3.3) and has also funded research into the use of acoustic reflectors on fishing nets – devices which bounce back the sonar sent by approaching dolphins, preventing them from swimming into the nets.⁶⁹

5.3.5 Labelling and promotion of sustainable seafood

The Co-op applies the UK seafood labelling laws for raw, fresh or frozen seafood to all its ranges – including processed products such as breaded fillets and ready-meals, which are usually exempt from this law.

The Co-op's sustainable seafood policy is not posted on its website, although it is available on request. Its most recent CSR report⁷⁰ and Annual Review⁷¹ do not make any mention

of a seafood policy, and the website has not been updated to reflect any work the Co-op has done since the publication of *A recipe for disaster*. There has been no mention of sustainable seafood in its members' magazines over the past nine months. The Co-op has no plans to promote alternative, more sustainable species to its customers.

5.4 Review of the Co-op's seafood policies

The Co-op's policies on sourcing from the marine environment extend beyond seafood into other areas of its business and investments – a breadth of approach no other supermarket has yet developed.

Its wild-caught seafood policies extend to all its own-brand ranges of seafood, although not to other brands. However, despite the fact it sells only small quantities of seafood, the Co-op still has some way to go to ensure that every item of seafood it sells is from a sustainable source. The Co-op needs to address wild seafood procurement in more detail and promote its policies to the public.

The Co-op's aquaculture policies are well developed and the research it is involved in makes it one of the industry leaders in this area.

Herring on the deck of a pair trawler begins its journey to supermarket shelves.

© Greenpeace/Davison



ASDA

'Always low prices'



6.1 ASDA's background

ASDA came into being in 1965, when Associated Dairies and the Asquith brothers' supermarket chain Queen's merged to form ASDA Stores Ltd.⁷² ASDA became part of the American Wal-Mart family in June 1999 and now has more than 300 stores across the UK, with over 93,000 employees.⁷³ ASDA recently expanded into Northern Ireland when it acquired 12 Safeway stores from Wm Morrison Supermarkets plc.⁷⁴ ASDA's estimated turnover in 2004/05 was £17 billion (ASDA keeps its financial details confidential so this total is estimated from recent market share figures⁷⁵).

As well as fresh food and groceries, ASDA stocks over 12,000 non-food products including household items and its own clothing line, George, and is rapidly expanding into new 'speciality' areas such as pharmacies, opticians, jewellery and photo departments.

6.2 ASDA's seafood policies – a history

In March 2005, ASDA's ethical trading manager requested a meeting with Greenpeace to discuss sustainability issues surrounding seafood procurement. At this time, the ASDA representatives appeared to know very little about the fishing industry, or the issues surrounding sustainable fish procurement. However, they stated that ASDA was developing a seafood procurement policy and agreed to input into the Greenpeace report on seafood sold in UK supermarkets.

Unfortunately, by the time the final report, *A recipe for disaster*, was released in October 2005, ASDA had provided little detail about its current buying practices or its plans to develop a meaningful sustainable procurement policy. As a result, ASDA was ranked at the bottom of the supermarket league table with a score of 1 out of 20, and became the target of public campaigning by Greenpeace to encourage it to develop a sustainable seafood policy.

In response to pressure from both Greenpeace and the Marine Conservation Society, a new team was developed within ASDA to work on seafood sustainability issues, and the retailer engaged more closely with both NGOs. In November 2005, ASDA provided more details of its current seafood procurement practices. However, the team was unable to communicate the development of a detailed policy on sustainability or provide any clear evidence of a commitment to change.

In January 2006, Greenpeace visited ASDA headquarters and local stores in Leeds with a banner and teams of Greenpeace fishmongers, and was promptly provided with an outline of ASDA's new Fish Sourcing Policy and Fisheries Principles (see Table 6.1), along with a promise that ASDA would delist three key unsustainably

sourced fish from its stores – dogfish, skate and Dover sole. In March 2006, ASDA provided Greenpeace with procurement information on each of the seafood species it sells under its own brand, as well as an action plan for the further development and improvement of its seafood procurement policies.

Since January, ASDA has successfully turned around its position on seafood and has made a series of commendable commitments to sustainable sourcing. At the same time, its parent company Wal-Mart has also reviewed its policy and is now a leader on sustainable seafood issues among retailers in the USA.

Table 6.1
ASDA's Fish Sourcing Policy and Fisheries Principles⁷⁶

The methods and techniques used in the production of ASDA products are rightly examined from a variety of standpoints. The issues associated with the use of natural resources and the impact on the environment of harvesting raw materials have a direct and indirect impact on the ultimate consumer. Our commitment is to offer a wide variety of sustainable seafood products to the public and to provide clear and accurate information in order to allow the shopper to make informed purchasing decisions.

Legal – Fish will only be sourced from suppliers who are able to demonstrate full compliance with national and international fisheries legislation and have systems which afford traceability of catches or harvests.

Sustainable – Sustainability is to be an assessed criterion in buying decisions based against a formal ASDA fishery rating protocol. ASDA will prioritise the use of wild-caught fish species derived from certified sustainable fisheries.

Responsible – ASDA will work only with suppliers who are able to demonstrate best practice for fisheries or fish farms and a regard for the environmental impact of their operations.

Visible – ASDA will actively engage with all interested stakeholders in the development of clear objectives for the support and development of best practice within the fish catching and farming sectors. We will provide clear and detailed labelling information regarding the origin of fish so that the consumer can make informed purchasing decisions.

6.3 ASDA's seafood policies – current

6.3.1 Seafood and suppliers

ASDA is increasing the number of fresh fish counters in its stores each year (207 stores now have counters), and its fishmongers are trained to give preparation and cooking advice.

Six main UK-based processors now provide the majority of ASDA's seafood, either directly from UK boats or from overseas sources. Some smaller suppliers also provide niche local products (amounting to less than 1% of all sales), such as the UK supplier Lyons Seafoods for chilled farmed prawns. ASDA has now set up a working group with suppliers to: develop and progress its Fisheries Principles, work within the industry to help improve management practices and rebuild fish stocks, and encourage suppliers to participate in the MSC's certification programme.

Young's Bluecrest supplies the majority of ASDA's seafood.⁷⁷ Young's Bluecrest has also amended and improved its sustainable procurement policies over the past year and has been providing support and advice to ASDA as it develops its more detailed policies.

6.3.2 Wild seafood procurement policies

ASDA's lack of a sustainable wild seafood procurement policy meant that it had been sourcing at least 13 of the most controversial, often unsustainably sourced species or groups of seafood. Under its new policy, ASDA has developed a fisheries rating protocol, so that it can review its current and future seafood ranges against sustainability measures. This has resulted in some species and fisheries being delisted and a review of the sourcing of other species. The retailer also intends to fully assess its current and planned ranges of fresh and pre-packed chilled seafood by September 2006. However, ASDA has thus far been reluctant to share the rating protocol with Greenpeace. ASDA has set no timeframe to extend its policy to all fresh and frozen value-added or ready-meal products, tinned and jarred products, or other brands.

Since the release of *A recipe for disaster*, ASDA has delisted Dover sole, lumpfish, dogfish, skate and swordfish due to concerns over sustainability. ASDA has also confirmed that it sells South African hake, rather than European hake. Cod from the North Sea was delisted from fresh, pre-packed chilled and frozen ranges in May 2006, but is still sold in ready-meal ranges. ASDA continues to sell cod from Iceland, Norway, the Baltic and Russia.

ASDA continues to review its sourcing of other Atlantic cod stocks, haddock, marlin, monkfish, plaice and tuna. Although the retailer insists on legal sourcing, this is seen as primarily the responsibility of its suppliers.

ASDA prohibits the sourcing of fish from fisheries engaging in deep-sea driftnetting (including large-scale gillnetting), shark finning, poison or dynamite fishing, and pair-trawling for sea bass. ASDA will require the use of bird scarers on long-line vessels to be implemented by June 2007, and is reviewing hook designs with its suppliers from long-line fisheries with the aim of reducing bycatch of other species such as turtles and sharks. Along with its suppliers, ASDA is also reviewing its position on deep-sea fisheries, bottom-trawling and dredging.

6.3.3 Aquaculture procurement policies

ASDA provided a basic outline of its code of practice for aquaculture for this report, which unfortunately offers little evidence to demonstrate that it operates at anything above basic industry standards. ASDA sources salmon primarily from the aquaculture giant Marine Harvest in Scotland; farmed sea bass from the Mediterranean; and tropical prawns from various sources.

Some positive moves by ASDA towards sourcing from sustainable aquaculture include the stocking of tilapia from the well-managed concern UK Tilapia Ltd⁷⁸ and the introduction of organic salmon and prawns to its seafood range. ASDA also states that it sources some of its prawns from farms in Vietnam, located in redundant rice paddies or banana plantations rather than in mangrove areas.

6.3.4 Support for sustainability initiatives

Up until 2006, ASDA had been stocking some MSC-labelled fish, including its own-brand Alaskan salmon, South African Cape hake and occasionally Young's Bluecrest and Birds Eye hoki. In January 2006, Wal-Mart pledged that within three years, all its fresh and frozen wild-caught fish would be sourced from MSC-certified fisheries.⁷⁹ ASDA followed its parent company in March with a similar commitment to source all its fresh wild-caught fish from MSC-certified fisheries within three to five years.⁸⁰ The MSC is advising ASDA on its sourcing to ensure this objective can be achieved.

Gordon Madden, Trading and Consumer Law Manager for ASDA, sits on the board of Seafish and has been chair of its legislative committee for several years.⁸¹ ASDA is working with Seafish to develop the 'Seafish Responsible Fishing Scheme'.⁸²

ASDA has put in writing⁸³ its support for the follow-up work to the Prime Minister's Strategy Unit report *Net benefits*, which proposes a long-term strategy for improving the fortunes of the UK fishing industry and reforming current EU fisheries management,⁸⁴ and for Greenpeace's proposal to create marine reserves in 40% of the North Sea.⁸⁵

In March 2006, when ASDA promised to delist North Sea cod, it also called for the whole of the North Sea to be turned into a marine conservation zone, with commercial fishing limited to local boats.⁸⁶ ASDA plans to work with European fisheries authorities and the North Sea Regional Advisory Committee on the North Sea cod recovery plan, and Gordon Madden has met with the European Commission's Director General of Fisheries (known as DG Fish) in Brussels with this aim.

6.3.5 Labelling and promotion of sustainable seafood

ASDA's fresh and own-brand processed seafood is currently labelled according to the requirements of the UK seafood labelling laws. Raw

fresh, pre-packed chilled, and frozen seafood is labelled with the species' common name and the FAO fisheries zone where it was caught or the country where it was farmed. Ready-meals such as battered fillets and fish pies usually carry only the common name.

ASDA intends to improve its labelling by including the nation of capture (eg 'caught in Icelandic waters') on its fresh and pre-packed chilled ranges by September 2006. ASDA also plans to include the method of catch where possible, particularly at fresh fish counters, as this is also an indicator of quality as well as sustainability.

All fresh and pre-packed seafood that is sourced from MSC-certified stocks is now labelled with the MSC logo, and ASDA is currently working on labelling MSC-certified fish in its ready-meal range.

ASDA currently has no commitment to improve labelling on its frozen or ready-meal ranges or to provide more detailed information in stores on each species, although these details will soon be provided on ASDA's website.

ASDA plans to communicate and publicise its policy decisions to advocacy groups, the seafood industry and the media, and now publishes an outline of its seafood policies on its website.⁸⁷

Finally, ASDA has developed a policy to promote fish seasonally, and aims to encourage consumers to substitute more sustainable options for their regular fish choices. This promotion includes a Fish of the Month programme – launched in June 2006 with the newly MSC-certified Pacific cod.

6.4 Review of ASDA's seafood policies

Over the last year, ASDA has managed to transform a lack of overall policy into a substantial commitment to sustainable seafood procurement and has demonstrated this by delisting a number of destructively fished species.

The retailer has made a serious commitment to sourcing its fresh and pre-packed chilled ranges of seafood solely from well-managed fisheries certified by the MSC within three to five years. However, this may be a difficult goal to achieve, as Sainsbury's has discovered since it made a similar promise in 2002 to source 100% MSC-certified products by 2010. ASDA needs to provide evidence that it will continue to work on improving the sustainability of its seafood while it waits for further fisheries to be certified, rather than relying on the MSC. A transparent fisheries rating protocol, through which each species would have to pass, would be a substantial move in the right direction.

ASDA has offered no firm commitment or timeline for improving the sustainability of the rest of its own-brand ranges (frozen, ready-meals, tins) or of the other-brand seafood it sells. The company's policy on aquaculture is another weak point, although it is developing a code of practice for farmed fish.

As ASDA continues to improve the sustainability of its seafood, and bring sustainability issues to both political arenas and the media, it will certainly become a strong influence on the sustainability of the seafood industry as a whole.

**Dogger Bank,
North Sea:**

Greenpeace volunteers take action to defend this proposed marine reserve from destructive fishing, such as beam trawling.

© Greenpeace/Reynaers



MORRISONS

'More reasons to shop at...'



7.1 Morrisons' background

Morrisons was founded by William Morrison in 1899 as an egg and butter merchant in Bradford.⁸⁸ Wm Morrison Supermarkets plc opened its first supermarket in Bradford in 1961 and by 2003 had expanded to 125 supermarkets, primarily in northern England, the Midlands and Wales. Morrisons' annual turnover for 2003/04 was £5.3 billion (about 5% of the market share).⁸⁹

In 2003, Wm Morrison Supermarkets plc began a takeover of Safeway, the fourth-largest UK supermarket chain, which was completed in 2004. Safeway started life as an American supermarket chain, entering the UK in 1962, but then broke its ties with the USA when Safeway Inc's UK food business was bought by rival retailer Argyll in 1987.⁹⁰ Prior to the takeover, Safeway had about 480 stores, and its annual turnover for 2002/03 was about £9.5 billion (about 10% of the market share).⁹¹

Morrisons is now the UK's fourth-largest supermarket chain with 378 stores (as at 29 January 2006), 123,000 employees and an annual turnover of £12.1 billion for 2005/06.⁹²

7.2 Morrisons' seafood policies – a history

In response to the first draft of *A recipe for disaster*, Morrisons provided only minimal written information on its sourcing policies, and was unable to meet with Greenpeace to elaborate on this.⁹³ There had been very little publicly available information on Morrisons' seafood policies, before or since the Safeway takeover. Safeway had published its first CSR report in 2002;⁹⁴ however, it is only since the takeover that Morrisons has undertaken a review of CSR priorities, systems and procedures and produced a CSR report.⁹⁵ This lack of open information resulted in the company being given a score of only 2 out of 20 in *A recipe for disaster*, putting it second to last in the supermarket league table.

Morrisons' failed to engage actively with Greenpeace's seafood campaign until February 2006 when it sent a letter updating Greenpeace on its recent work. By coincidence, this letter arrived on the same day that Greenpeace visited Morrisons' head office and major supermarket store in Bradford with climbers, banners and Greenpeace fishmongers, in an attempt to highlight the company's apparent lack of progress on sustainable seafood.

During the ensuing meeting, Morrisons revealed that it had been actively improving the sustainability of its seafood for some months, and had removed some species from its counters, but had simply failed to communicate this publicly. At this meeting Morrisons developed a clear public statement on its Sustainable Seafood Procurement Policy (see Table 7.1), with the help of Greenpeace, and agreed to stop selling conger eel and to review further species.

Table 7.1
Morrisons' Sustainable Seafood Procurement Policy

We acknowledge that supermarkets have a major part to play in sustainable seafood sourcing. We are committed to sustaining fish stocks and we have sustainable seafood procurement policies in place, which are being developed and implemented. Overall, our policy is to buy from the most sustainable sources, wherever stock is available.

We understand that sustainable seafood does not fall under any of the following four categories:

- seafood from overfished stocks, and/or stocks assessed by the IUCN as vulnerable, threatened or endangered;
- seafood species that are vulnerable to exploitation;
- seafood from poorly managed or unregulated fisheries; and
- seafood caught using methods which are detrimental to other marine species and/or habitats.

In order to deliver sustainable seafood to our customers we have sustainable seafood procurement policies in place, which cover the following goals:

1. Remove the worst

- Moving towards removing all current Marine Conservation Society grade 5 (or equivalent) species.

2. Support the best

- We have increased and will continue to increase the range of sustainable seafood (grades 1 and 2) available.

3. Improve the rest

- Work with suppliers to source fish from less depleted stocks.
- Work with the fishing industry and/or researchers to improve sustainability of fishing methods.
- Work towards selling fish from suppliers that are open to change, to address the need for sustainability.

4. Demonstrate and promote sustainable practices

- Provide a clear seafood procurement policy for consumers.
- Report regularly on progress being made.
- On the wet fish counter, start to work towards achieving the ideal of clearly labelling all products containing seafood with the common and scientific names and the fishing or harvesting method used.
- Support sustainability initiatives such as the Marine Conservation Society, Invest in Fish and the Marine Stewardship Council, where there is common ground.
- Ensure that staff are provided with the necessary information for customers.
- Promote sustainable seafood to customers.
- Promote alternative sources of omega-3 fatty acids.

7.3 Morrisons' seafood policies – current

Like the other large supermarkets, Morrisons has now made a series of sustainable sourcing decisions and has engaged with the industry in a manner that shows a more serious commitment to sustainable seafood sourcing.

7.3.1 Seafood and suppliers

Morrisons sells a full range of seafood under its own brand at its fish counters, and in its pre-packed chilled, ready-meal, frozen and tinned ranges. It also sells other brands of frozen, tinned and jarred seafood.

Morrisons' fresh fish counters form part of the supermarket's 'Market Street', a selection of specialist food counters staffed by experts. The trained fishmongers have access to sustainability information for all seafood, provided by the company's fish specialist. They sell over 48 different fish species when in season, some of which, such as swordfish, are available to order only.

Morrisons has a dedicated fish-buying team of two and a fish specialist who works with its buyers and fishmongers in the stores. The team sources both the wild-caught and farmed species for the retailer's fish counters and pre-packed ranges. Buyers for frozen and tinned products are also under guidance from this team.

Morrisons' fresh fish is sourced directly from a small number of UK-based processors and specialist suppliers which buy fish from markets that are supplied directly by UK boats, or from overseas sources. Stores also offer a seasonal choice of local seafood from small suppliers. All Morrisons suppliers must demonstrate a commitment to sustainable and responsible sourcing. Major suppliers include Young's Bluecrest and New England Seafood.

7.3.2 Wild seafood procurement policies

Morrisons' sustainable seafood policy covers its entire range of own-brand seafood. Although the fish-buying team has focused initially on reviewing its sourcing for the fresh fish counters, it is now reviewing the rest of the range. As a result of this sustainability review, Morrisons has now removed a number of species from its shelves (see Table 7.2) and is working on the sourcing of the remaining controversial species to ensure they are from less depleted stocks and fished using less destructive methods. In addition, Morrisons has further increased its range of more sustainable seafood choices, which it hopes will take the pressure off more vulnerable species.

Morrisons claims to source preferentially, wherever possible, from fisheries using methods with a lower impact on the wider ecosystem, such as pots, hand-line, pole-and-line and long-line. It is working to source from long-line fisheries that have adopted methods to reduce turtle and seabird bycatch.

Where trawls are used, Morrisons aims to source from boats using bycatch reduction techniques such as larger mesh sizes in trawls, and exclusion devices to reduce capture of large non-target marine species.

Table 7.2
Species delisted in 2006 by Morrisons from its own-brand seafood ranges

Common name	Delisting
Atlantic halibut	February
Brill	February
Conger - all species	March
European hake	February
Grey mullet - all species	February
Grouper - all species	February
Ling - all species	January
Redfish - all species	January
Dogfish - all species	March
Skate - all species except starry, spotted and cuckoo rays	June

Cod and haddock

Fresh and pre-packed cod is line-caught and sourced from Iceland. The majority of haddock is sourced from Iceland (of which 85% is line-caught and the remainder purse-seined), with a small percentage from Norway. No sustainability data has been provided for cod and haddock in other ranges or of other brands.

Skate

Morrisons now accepts only three species of skate from its suppliers: cuckoo, spotted and starry rays. The retailer believes these to be the least problematic skate species. Suppliers are required to separate the species and label them with the scientific name, and to ensure that landing information has been recorded. Morrisons intends to engage with various stakeholders in the skate fisheries to improve these fisheries. However, it has not yet set any deadlines for delisting the species that it sells if scientific information is not provided and a sustainable management regime for the fisheries is not put in place.

Tuna

Fresh tuna is all yellowfin tuna from the Indian Ocean around Sri Lanka and the Maldives, caught by rod-and-line or short-lines. The four companies who supply this tuna claim to be actively working with small artisanal boats, local fisherman and funding sustainability initiatives in the region, although some are known to source from long-liners.

Morrisons' own-brand tuna tins carry a 'Dolphin-Friendly' logo, with much of the range being line-caught skipjack or yellowfin from the Indian or Pacific Oceans.

Swordfish

Swordfish is line-caught and is currently sourced from the US fishery, which is better managed than others and is undergoing MSC pre-assessment. Morrisons limits the amount of swordfish it sells by making it available only to order.

Snapper

Morrisons is currently reviewing its sourcing of red snapper, but avoids buying depleted species such as cubera and mutton snapper. Morrisons currently sources yellowtail, lane, vermillion and silk snapper. All are line-caught fish from a managed fishery.

Other species of concern

Morrisons has switched its supply of monkfish to the American and Brazilian species and now sources its plaice from Iceland. Dover sole is sourced from the Eastern English Channel stock.

7.3.3 Aquaculture policies

Having been largely focused on developing its wild sourcing policies, Morrisons has only recently begun work to define its policy on sustainable fish farming. The review will cover principles and criteria for farm management, including environmental considerations and fish health, welfare and husbandry, and is due by the end of 2006.

Morrisons sells a wide range of farmed seafood species including salmon, trout, arctic char, sea bass, sea bream, turbot, carp, barramundi, tilapia, clams, oysters and mussels.

Morrisons' farmed seafood is currently fully traceable to the farm of origin, and the farms are well managed and producing to recognised assurance scheme standards. Salmon is bought directly from the farms and all trout suppliers are Quality Trout UK-accredited.

7.3.4 Support for sustainability initiatives

Morrisons has provided no details of the sustainability initiatives that it supports or funds.

7.3.5 Labelling and promotion of sustainable seafood

Morrisons' fresh and own-brand processed seafood is labelled according to UK seafood labelling laws (common name, and FAO region of capture or country of farming); however, the retailer is soon to launch an improved labelling system for all wild-caught fish on all fish counters and on pre-packed chilled seafood. The labels will show the common and scientific name, the method of capture, and the specific region where caught as well as the broader FAO region, eg 'Atlantic cod (*Gadus morhua*), line-caught in the Icelandic waters of the North-East Atlantic'. This labelling scheme should be in place by September 2006 and Morrisons will then consider whether it can be applied to other fish ranges.

Morrisons has increased its range of sustainable seafood and has expanded its range of MSC-certified fish to include wild Alaskan salmon, South West UK mackerel, South African Cape hake and New Zealand hoki.

Morrisons runs a monthly sustainable fish promotion, overseen by its fish specialist, which promotes a new fish each month and provides details on the species and how to cook it. Morrisons has plans to promote sustainable fish through recipe cards.

Morrisons does not yet provide details of its sustainable seafood policy in store or on its website, and it is only mentioned briefly in its short CSR report. The company is currently working on improving the accessibility of its policy.

7.4 Review of Morrisons' seafood policies

Morrisons has made a substantial commitment to sourcing sustainable seafood by delisting a large range of species and increasing the range of alternative species available to customers. Its sourcing team shows a high level of knowledge of sustainability issues and certainly understands which areas need addressing. Although Morrisons focuses primarily on fish stocks, it has done some work on sourcing from fisheries using less destructive fishing methods.

Like those of most other supermarkets, Morrisons' policy currently only covers its own-brand fresh and prepacked fish, and it has yet to develop a policy on sustainable aquaculture.



Fresh fish counters in supermarkets now stock a better range of sustainably sourced fish.

TESCO

'Every little helps'



8.1 Tesco's background

The brand name of Tesco first appeared on packets of tea in the 1920s and the first Tesco store was opened in 1929 in North London.⁹⁶ Tesco now operates in 13 countries – the UK, Ireland, Poland, Hungary, the Czech Republic, Slovakia, Turkey, China, Thailand, South Korea, Malaysia, Taiwan and Japan.

Tesco trades primarily in food but also has a non-food sector, including clothing, household goods, personal finance and Tesco Telecoms. The UK is Tesco's core market with 1,897 of its 2,710 stores worldwide. Tesco employs over 380,000 people globally (270,000 in the UK). Total sales in 2005/06 were £37.1 billion – £29.5 billion in the UK and £7.6 billion in the rest of Europe and Asia.⁹⁷

8.2 Tesco's seafood policies – a history

Prior to 2006, Tesco's publicly-available seafood policy, as set out in its 2005 CSR review, was limited to two short paragraphs.⁹⁸ However, specific seafood procurement policies had been mentioned in the media and discussed through engagement with NGOs. Tesco agreed to meet with Greenpeace and provided some additional details of its policies for *A recipe for disaster*.

At that time, Tesco showed considerable reluctance to provide detailed documents or codes of practice on sourcing of sustainable seafood, and was rarely able to give evidence of how its policies were being put into practice, or to show that sourcing decisions were based on sustainability considerations rather than a purely financial basis. Tesco's policies tended to be implemented reactively – in response to pressure from NGOs – rather than being applied proactively. Tesco was selling at least 12 of the most controversial, often unsustainably sourced species or groups of seafood, and there was no sign that that it was making an effort to delist these species or to find more sustainable sources. For these reasons Tesco scored only 5 out of 20 in *A recipe for disaster* and was placed sixth in the supermarkets league table.

8.3 Tesco's seafood policies – current

After an extensive review of its policies, including a commitment to make its sourcing decisions more transparent, Tesco instigated a meeting with its seafood buyers, its major supplier Seachill, and Greenpeace, to present and discuss its new, more detailed, sustainable seafood policy. At this meeting Tesco shared detailed information about its seafood policies and practices, including its seafood procurement policy and its fish sourcing decision tree, which identifies clearly how sustainability criteria are applied to the fish buying process.

Tesco's new sustainable seafood procurement policy is primarily focused on the sourcing of wild-caught fish for its fish counters and pre-packed fresh fish lines for its UK operations. Tesco is currently

conducting a review of the remainder of its seafood ranges, including frozen, ready-meal and tinned lines.

The retailer's overall approach is described in its commitment statement shown in Table 6.1.

8.3.1 Seafood and suppliers

Currently, Tesco has a team of two dedicated technical managers and three specialist fish buyers with experience in issues of seafood sustainability, that sources seafood for its fish counters (now in approximately half of its larger-format stores – 425 counters in total) and pre-packed range. A fish specialist to support the delivery of the company's in-store operations will be appointed shortly. Tesco also employs aquaculture managers who set and implement policy for its farmed fish suppliers.

Tesco encourages business with local suppliers in each country where it has stores, and operates on a principle of long-term supply partnerships, preferring to deal directly with vessel owners and agents rather than with auction markets. Tesco works with its suppliers to develop best working practices, and suppliers are reviewed each year. In the UK, Tesco currently has six major suppliers. Seachill in Grimsby supplies the bulk of Tesco's fresh fish, and has been active in the development of Tesco's sustainable seafood policies.

Table 8.1 Tesco's commitment to sustainable seafood sourcing⁹⁹

We have an obligation to maintain the highest standards of corporate behaviour in all areas of our business including where and how we source the products we sell.

There is also, undeniably, a strong business case for sustainable sourcing policies for natural resources including the fish we sell – we recognise that we can only continue to meet customer demand for this healthy food choice if we play our part in protecting the long-term future of wild fish populations.

We are fully aware of the current pressures on wild fish populations and believe we should play our part in minimising the impact we have and promoting more sustainable behaviours.

Our approach:

1. Not to stock wild fish from overfished or vulnerable stocks.
2. To support sustainable sourcing initiatives.
3. To work with suppliers and the industry to improve sustainability of fisheries and fishing methods.
4. To promote sustainable fish species by increasing the range of sustainable seafood we stock, clear labelling, customer information and staff training.

8.3.2 Wild seafood procurement policies

Tesco's policy on fresh and chilled seafood procurement is now based on a species-by-species sustainability review which takes into consideration data from scientists, governments, NGOs and other stakeholders. Each species is passed through a simple fish sourcing decision tree to decide firstly if it is commercially viable, and then to determine a sustainability rating for each of the various fisheries from which Tesco might source it. MSC-certified fisheries and those that the Marine Conservation Society considers a grade 1, 2 or 3 (fewer sustainability issues) on its **FISHONLINE** sustainability grading system,¹⁰⁰ automatically make it onto the 'buy' list and are reviewed every 18 months. Species that are ungraded or graded 4 or 5 by the Marine Conservation Society are reviewed in more detail to determine whether there are sufficient controls in place to justify sourcing from a particular area or fishery. The fisheries which cannot demonstrate evidence of (or a commitment to moving towards) adequate stock assessment and management, avoidance of at-risk stocks, and best-practice fishing methods, are not sourced from. These fisheries are reviewed every six months, or whenever scientific studies provide further details of stocks and fishing methods.

Tesco maintains a database of species that are currently sold or have been considered for sale, and the results of the decision tree process, and has allowed Greenpeace to consult this. Tesco had already delisted various fish species over the past few years, and following the development of its decision tree has classed further species as 'Do not buy'. The retailer's listing of species which should and should not be procured is reviewed regularly to reflect the latest scientific research, industry developments and changes to fish stocks.

In addition to this regular species-by-species review of its wild fish sourcing, Tesco claims to insist on fishing methods and gear that minimise harm to non-target species and juvenile fish (for example the use of larger mesh sizes, and a preference for line-fishing over trawling), and aims to avoid buying fish caught during the spawning season. However, Tesco currently sells dredged king scallops, and beam-trawled fish of various species such as plaice and Dover sole – both these fishing methods can be devastating to seabed ecosystems.

In September 2006, Tesco will formally review all its fresh and pre-packed seafood lines over which there is any uncertainty concerning sustainability. Sourcing details for the controversial species that Tesco continues to sell are discussed in the following paragraphs:

Cod and haddock

Tesco's fresh and pre-packed lines of cod and haddock are sourced mainly from Iceland and Norway, and its buyers are considering sources from the Faeroes. For these ranges, Tesco specifies line-fishing in preference to trawling for cod and

haddock – however, due to quota restrictions and adverse weather conditions, about 30% of this fish is still trawled. Tesco has one Scottish supplier which catches North Sea haddock by purse seine (a relatively sustainable fishing method) for its Scottish stores. Tesco claims it does not sell fresh or pre-packed cod from the North Sea or from other depleted stocks, but this claim does not extend to the other Tesco ranges or other-brand cod.

Tesco insists on the use of large-mesh nets for its trawled Icelandic cod, to reduce bycatch of juveniles and small non-target species. It also specifies minimum sizes (corresponding to mature fish sizes) for cod and haddock fillets sold on its fresh fish counters. Own-brand cod roe has now been delisted, as the product is extracted from spawning fish; however, Tesco still sells cod roe of other brands.

Flatfish

Tesco sources Dover sole from the MSC-certified Hastings fishery, but also from other southern fisheries (targeting the Eastern English Channel stock where possible) and from the Skagerrak & Kattegat area – none of which are certified. All the southern Dover sole stocks are considered by ICES to be fished at unsustainable levels – the Western English Channel stock is well below precautionary levels and close to the level at which it may not be able to reproduce.¹⁰¹ In addition, the majority of Dover sole is beam-trawled.

Tesco's lemon sole and plaice come from the Icelandic and Norwegian fisheries, which do not use beam trawls, as well as from the flatfish beam-trawl fisheries in the North Sea. Tesco is currently reviewing the sustainability of beam trawling in the North Sea, and is considering switching all its sourcing to Icelandic stocks. Tesco specifies a higher mesh size than the industry average to minimise juvenile fish bycatch, and avoids selling spawning plaice by discontinuing fresh plaice during the spawning season and replacing it with previously frozen plaice caught before the season started.

Tesco replaced wild Atlantic halibut with fresh and pre-packed farmed halibut in June 2006, as the IUCN considers the species to be endangered.¹⁰²

Skate

Tesco sources most of its skate from an area of the North-East Atlantic surrounding Ireland and south-west England and sometimes from the seas off the west of Scotland. Unlike other supermarkets that continue to sell skate, Tesco has not specified which species it targets or avoids.

Following pressure from Greenpeace and the Marine Conservation Society to delist skate, Tesco sponsored a Seafish workshop involving fishermen, NGOs and other stakeholders. The workshop aimed to review available knowledge on the skate fisheries around the UK and to set up research initiatives to determine whether any stocks of skate could be fished

sustainably.¹⁰³ Unfortunately, despite expressing interest in attending the workshop, Greenpeace was not invited.

Dogfish

Rather than sourcing from depleted European stocks, Tesco has now switched to selling one species of dogfish (piked dogfish) from the bottom long-line fishery off British Columbia, Canada, which is undergoing pre-assessment for MSC-certification.

Monkfish

Tesco is awaiting the results of scientific reviews that may indicate that European monkfish stocks are in better condition than once thought. It is also considering sourcing from stocks in the North-West Atlantic, some of which are showing signs of recovery. However, the company should also consider the impacts of the fishing methods used – bottom trawls and gillnets – on non-target species when reconsidering its sourcing policy on monkfish.

Tuna

Tesco has dropped fresh bigeye tuna steaks from its pre-packed chilled range. Tesco sources yellowfin tuna from the Indian Ocean and Brazil for its fresh and pre-packed chilled range – primarily from long-line fisheries (70%), with some from hand-line or pole-and-line fisheries in areas that Tesco considers to have sufficient stocks to sustain fishing effort. Rapid-sinking lines are used to minimise seabird bycatch. Albacore is not sourced for the company's fresh or pre-packed ranges, but may still be used in the frozen, ready-meal and tinned ranges. Tesco's own-brand tinned tuna is line-caught and is sourced from suppliers that are certified by the EIU as Dolphin Safe.

Whiting

Tesco is aware of concerns regarding both stock levels in the North Sea and bycatch, and is in the process of evaluating the option of switching to alternative south-western UK stocks. In the interim, Tesco is working with Seafish on best practice methods to avoid bycatch of cod.

Whales and dolphins

Tesco removed whale and dolphin products from its Japanese stores in 2004.¹⁰⁴ Although it does trade with Icelandic and Norwegian fish and shellfish suppliers, Tesco claims that none of its suppliers are connected with whaling or the trade in whale meat in Iceland and Norway.¹⁰⁵

Other species of concern

Tesco has made no mention of plans to delist lumpfish caviar or farmed eel. Lumpfish fisheries are largely unmanaged, and the species is caught in trawls and gillnets during its spawning season.

Eels are severely depleted throughout Europe, and farmed eels can only be grown from wild-caught juveniles.¹⁰⁶

8.3.3 Aquaculture policies

Tesco claims to have developed four codes of practice for aquaculture, covering salmon and trout, tilapia, sea bass and sea bream, and tropical prawns. They have been written and are implemented by the Tesco agricultural team in conjunction with independent veterinary, animal welfare and environmental experts. Unfortunately, Tesco has not yet provided Greenpeace with copies of these codes of practice.

Tesco claims that these aquaculture codes of practice are based on the most robust national farm schemes in existence (eg the Scottish Quality Salmon scheme), with additional Tesco-specific standards and 'aspirational standards' – areas where either further research is required, or the whole industry needs to invest to improve farming standards. Requirements of conservation and animal welfare organisations, such as the RSPCA and the EIJ, have been considered. All suppliers of farmed fish to Tesco are independently audited against the codes of practice by an external company.

At the time that *A recipe for disaster* was published, Tesco did not stock organic or Freedom Food-certified farmed seafood. However, it now stocks organic cod from Johnson Sustainable Seafoods in Shetland,¹⁰⁷ and intends to introduce several new lines of organic farmed prawns and salmon in the coming months.

Prawns

Tesco states that it has established long-term relationships with a number of prawn farms in Brazil, Ecuador, Honduras, Indonesia, and Nicaragua for use in its own-brand products, including fresh, frozen and processed foods. All Tesco's tropical prawns are produced in accordance with its code of practice for farmed prawn production, and the farms are also audited against the ETI base code on workers' rights, in line with Tesco's ethical trading policy.

8.3.4 Support for sustainability initiatives

Tesco has an ongoing relationship with the MSC. It is a member of the MSC European commercial group and is working with its suppliers to encourage the development of MSC-certified fisheries around the world. Tesco funded the MSC Environmental Benefits Workshop in June 2006, which brought together experts to evaluate the positive impacts that MSC certification is having on the wider environment, not merely on the fish stocks it certifies.¹⁰⁸

Tesco sells seven MSC-certified products and is looking to extend its range. The MSC lines currently sold are Alaska pollock, Pacific cod, Hastings Dover sole, wild Alaskan salmon, Australian rock lobster, Thames Blackwater driftnet herring and South African Cape hake. Tesco fresh fish counters were accredited with full chain of custody by the MSC in 2005 and Tesco sells its current

range of MSC-certified fish at its counters, fully labelled, as they come into season.

As well as funding Seafish's workshop on skate and ray fisheries (see section 8.3.2), Tesco is working with the organisation to develop the Seafish Responsible Fishing Scheme.

8.3.5 Labelling and promotion of sustainable seafood

Labels on Tesco fresh and pre-packed chilled seafood ranges tend to provide only the details required by UK seafood labelling laws. Standard farmed salmon products show the region and country of the farm, and the 'Tesco's Finest' and organic product lines also include the farm name. A few of Tesco's prawn products show the scientific species name. Frozen and tinned seafood carry the minimal labelling required by UK seafood labelling laws.

Tesco is currently working on improving the labelling of MSC-certified products. While Tesco has sourced MSC-certified seafood for some time for its fish counters and other packaged ranges, it has not always labelled it as such. The company is overcoming this problem by developing MSC stickers that can be added to packaging as required.

Tesco is increasing its range of more sustainable seafood choices such as mahi mahi and red mullet at fish counters. It will promote these, along with its MSC lines, through its magazine, in-store

TVs and posters, loyalty card mailings, and its new touch-screen scales from which fish counter staff can obtain further information and print it off for customers. Tesco's two-day 'Pride in our Counters' training course for fish counter staff covers sustainability issues and has been attended by 900 staff.

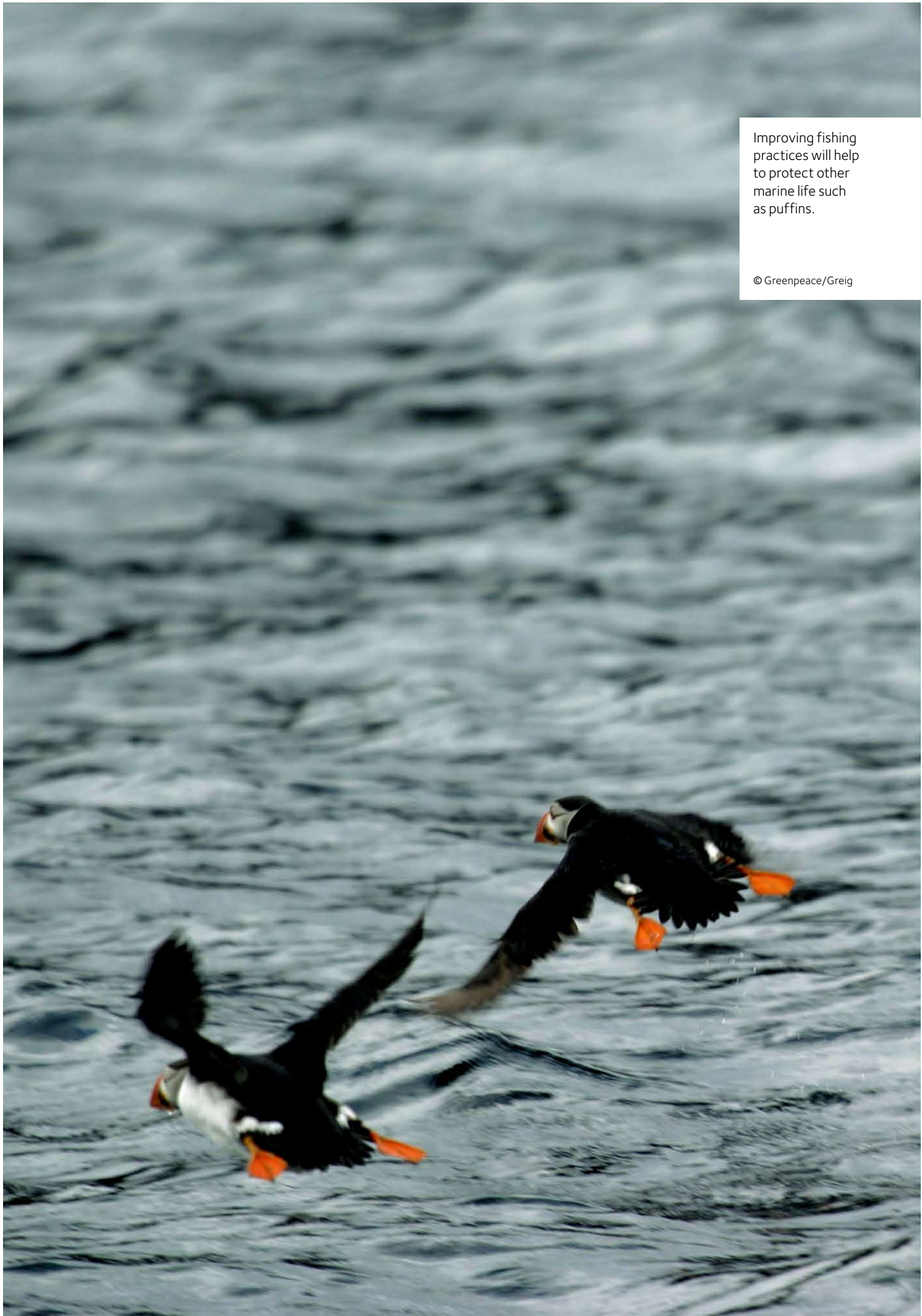
8.4 Review of Tesco's seafood policies

Tesco's decision to be somewhat more transparent with its new sourcing policies has revealed that the company is moving forward on sustainability issues with some success. At present, much of the policy is limited to the fresh and chilled pre-packed ranges, ignoring the frozen, ready-meal or tinned seafood, which is unfortunate as these ranges encompass the majority of the seafood sold. Tesco is taking steps to address this shortcoming, but has yet to provide details of a long-term strategy to address the sustainability of all its products that contain seafood.

It is unclear how Tesco is applying its sustainable sourcing policies to seafood sourced through aquaculture; but it is now beginning to source a greater range of organically farmed seafood which reduces many of the impacts of fish farming. The retailer has agreed to discuss its aquaculture policy in the near future. Tesco has certainly shown determination to improve its sustainable seafood sourcing, and it will be interesting to see the company set itself some stronger projects and goals over the next year.

Improving fishing practices will help to protect other marine life such as puffins.

© Greenpeace/Greig



SOMERFIELD

'Good food made easy'



9.1 Somerfield's background

Somerfield began as a small family grocery store in Bristol in 1875. Somerfield merged with Kwik Save in 1998, and by 2005 the group was operating over 1,300 stores under the two brands.¹⁰⁹ Somerfield Group plc was bought by a consortium in December 2005 and became the privately-owned Somerfield Stores Ltd. Somerfield announced in February 2006 that it had sold the Kwik Save brand and 171 stores to a new company specifically formed to operate Kwik Save.¹¹⁰ Somerfield will convert 103 Kwik Save stores to the Somerfield fascia, and the remaining stores will be sold to other retailers.

Somerfield's 1000-plus stores include the convenience stores Market Fresh and Essentials, on high streets and garage forecourts, as well as larger Somerfield supermarkets. Somerfield stores offer 'high-quality groceries' with an emphasis on fresh foods, along with a range of kitchen, household and car-care items and children's clothing in the larger supermarkets. The Somerfield group turnover in 2004/05 was £5.2 billion.¹¹¹

9.2 Somerfield's seafood policies – a history

During the writing of *A recipe for disaster*, Somerfield agreed to meet with Greenpeace to discuss sustainability issues and provided a copy of its wild and farmed seafood sourcing policy.¹¹² Its limited policies on sustainable seafood procurement earned Somerfield a score of only 6 out of 20 in *A recipe for disaster*, putting it fifth in the supermarket league table.

9.3 Somerfield's seafood policies – current

Somerfield is not planning to develop a more comprehensive sustainable seafood policy, and indeed considers itself too small a player in the grocery market to lead on sustainable seafood procurement.¹¹³ Somerfield has made very few changes to its seafood sourcing policy in the past year; however, it has followed the lead of some of the other bigger retailers in removing the most unsustainable species from its stores – dogfish, skate, and swordfish.

9.3.1 Seafood and suppliers

Somerfield has a range of fresh, pre-packed chilled, frozen and tinned seafood products, with a commitment to local and regional sourcing where possible. Riddlers, a seafood supplier based in Devon, supplies seafood for Somerfield's fish counters and pre-packed chilled range. The majority of this supply is fresh from local day-boats based in south-west England, although during times of low availability, Riddlers may provide frozen fish

from other sources. Youngs' Bluecrest supplies Somerfield with its fresh farmed salmon and trout. Somerfield now has small fish counters in 24 of its stores.

9.3.2 Wild seafood procurement policies

Somerfield's fish sourcing policy is available on its website.¹¹⁴ Suppliers are expected to comply with Somerfield's fish sourcing policy, which states: 'It is Somerfield's intention that all own-label wild fish is sourced from managed fisheries. Somerfield acknowledge that there is an increasing demand for seafood and we expect our suppliers to target well-managed or sustainable fisheries within their company business plans and to participate in initiatives which promote responsible fishing.'¹¹⁵ Somerfield also prohibits the use of fish from illegal landings.

Somerfield delisted dogfish, monkfish, and swordfish in December 2005, and skate in April 2006, due to sustainability concerns.¹¹⁶ Dogfish, skate and swordfish were only being sold on their fish counters, while monkfish was also sold in its pre-packed chilled range.

Somerfield specifies that its own-brand tuna must be sourced by long-line, trolling, pole-and-line or hand-line. Tuna caught by purse seine must be in accordance with international dolphin safe methods, as approved by independent certification bodies. Tinned tuna suppliers are required to tender every year, so certification bodies may change.

Somerfield states that it is committed to sourcing prawns sustainably. Somerfield's cold-water prawns are sourced from Iceland, where the controls require all fishing to cease if the bycatch exceeds 4%, which according to Somerfield, is usually 2% or lower.¹¹⁷ Somerfield does not buy wild-caught tropical prawns.

Somerfield has provided little other detail of its sourcing of other controversial species such as cod, haddock, plaice and hake. However, seafood species sourced from fisheries operating in south-west England do tend to be from healthier stocks than elsewhere in European waters.

9.3.3 Aquaculture policies

Somerfield states that all its farmed fish are grown in accordance with the 'five freedoms', as defined by the Farm Animal Welfare Council, although they are not certified as Freedom Food. Somerfield encourages its suppliers constantly to improve aquaculture welfare standards with regard to all phases of the fish's lifecycle and with respect to harvesting methods. Somerfield advocates industry research into alternative sources of protein for fishmeal other than wild marine fish.

All fish and shellfish farms supplying to Somerfield must be subjected to environmental impact assessments to ensure that no lasting damage is being done to the geology or wildlife of the

area. Somerfield encourages suppliers to work towards ISO 14000 certification by managing environmental issues in their businesses, and they must also comply with Somerfield's ethical trading policy with regard to worker's rights.

9.3.4 Support for sustainability initiatives

Somerfield claims to support sustainability initiatives such as the MSC – however the supermarket only currently stocks a few products containing MSC-certified Alaskan salmon. According to Somerfield's Technical Manager the company has on two separate occasions tried to promote and sell MSC New Zealand hoki – once as natural fillets and once sauced – but discontinued both lines as they were not selling.¹¹⁸

9.3.5 Labelling and promotion of sustainable seafood

Somerfield's fresh and own-brand seafood is labelled according to UK seafood labelling laws. On its fresh fish counters the labels include the region of landing (eg 'caught in the North-East Atlantic, landed and processed in the West Country'). Somerfield sourcing policy states that it 'does not boycott fisheries due to consumer pressure' but that it will occasionally provide more information on labels to allow consumers to make a more informed choice. In response to the EJF campaign, for example, all Somerfield's own-brand farmed tropical prawn products now include the country of origin.

9.4 Review of Somerfield's seafood policies

It is disappointing that Somerfield has not yet chosen to develop a more comprehensive sustainable seafood procurement policy. However, the retailer has at least shown a commitment to follow retail standards by delisting the most unsustainable species, and it does have a basic aquaculture policy. Although its limited range of seafood means that it appears to be selling only five controversial seafood species or groups, its customers have few alternative seafood choices.

With a small range of seafood and a limited number of suppliers, Somerfield could improve the sustainability of its seafood much more quickly than the larger supermarkets. The continued increase in the number of small fish counters selling locally caught fish in some regions is a good opportunity for Somerfield to promote more sustainable, locally caught, seafood choices.



This swordfish has been caught by illegal driftnet fishing. Global stocks of swordfish are massively overfished.

© Greenpeace/Newman

ICELAND

'Food you can trust'



10.1 Iceland's background

Iceland was founded in 1970 as a single shop in Oswestry selling frozen food, and is now a high-street supermarket chain with over 700 stores across the UK and Ireland. Iceland was formerly part of The Big Food Group, but in February 2005, the group was bought and split up by the Baugur Group, an Icelandic investments group, and Iceland became a private company.

Iceland employs over 22,000 people, and serves more than 3.4 million customers each week with a choice of over 4,000 products. Iceland's turnover in 2004/05 was £1.5 billion.¹¹⁹

Iceland is known for its frozen food range, but has been expanding its stores and now also offers a range of groceries including fresh fruit and vegetables, chilled products, toiletries, fresh bread, wine and beer; over 300 stores also sell home appliances. Iceland's own brand products are made with no artificial colours, flavours or GM ingredients (the first supermarket to go non-GM with their own brand).

10.2 Iceland's seafood policies – a history

At the time *A recipe for disaster* was being written, Iceland had no sustainable seafood procurement policy other than a basic statement on tuna. However, its very limited range of frozen seafood meant that the retailer sold fewer of the more controversial, often unsustainably sourced species or groups of seafood than other supermarkets. Iceland scored three points out of 20 and was placed seventh on the supermarket league table.

10.3 Iceland's seafood policies – current

Iceland sells a very limited range of its own and other brand traditional frozen seafood. Although the range of seafood species sold is small, Iceland sells more frozen seafood than each of the other supermarkets, except Tesco.¹²⁰ These sales are primarily of the popular and unsustainable cod, haddock, plaice, farmed salmon, and tuna. Iceland's Food Legislation Manager has confirmed that Iceland has no intention to expand its range into fresh fish.¹²¹

Iceland is now in the process of finalising its new 'fish sustainability and welfare policy' which it has developed with its suppliers for wild-caught and farm seafood.¹²² Part of the policy includes introducing a range of MSC-certified products including Alaskan salmon, and South African Cape hake. Iceland has replaced the farmed salmon in one of its popular frozen meals with MSC salmon.

Iceland's own-brand frozen tuna is line-caught and its supplier complies with the EIU Dolphin Safe policy.

Iceland's seafood is labelled according to the requirements of the UK seafood labelling laws.

10.4 Review of Iceland's seafood policies

Iceland's promise of a new sustainable seafood policy is an exciting development. While it is not possible to assess this policy at this time, Iceland is keen to engage with Greenpeace on this issue once the policy has been finalised.



**Northern bluefin tuna
inside a transport cage,
Mediterranean:**

Tuna is caught alive by purse seine vessels and towed to ranches for fattening, prior to exporting to Japan.

CONCLUSIONS AND NEW CHALLENGES

11.1 Supermarket policies have improved

In the 2005 report, *A recipe for disaster*, Greenpeace challenged supermarkets to develop clear goals for implementing sustainable seafood policies based on the three-part model: remove the worst, support the best, improve the rest. The shift within supermarkets' attitudes to sourcing sustainable seafood over the past year has been phenomenal. Sustainable seafood procurement policies that were already in place have been strengthened, and almost all those retailers that previously had no clear policy have now developed and begun to implement them.

This year, supermarkets are ranked not only on the overall quality of their wild-capture and aquaculture seafood policies, but also on delivery – how far they have got in implementing these policies. For example, Sainsbury's new policies are now as comprehensive as the two leading supermarkets, but the retailer will need time to roll-out these policies throughout their entire seafood range sold in their stores. Greenpeace's more detailed assessment is primarily based upon evidence provided by supermarkets that shows they are:

- **Removing the worst** – by immediately beginning the process of removing the most destructively fished species from the shelves. For the few of these species with stocks that are not yet severely depleted, supermarkets must clearly specify the source and method of fishing and work to improve the sustainability;
- **Supporting the best** – by increasing the range of sustainable seafood they sell and ensuring that sustainable species are promoted effectively in store, on their websites and in their magazines; and
- **Improving the rest** – by working with suppliers to source fish from only the least depleted stocks or the best aquaculture methods, working with the fishing industry and/or researchers

to improve sustainability of fishing and aquaculture methods, and rejecting suppliers that refuse to change.

11.1.1 The new league table

It is difficult to represent the changes that have been made in the past year with regard to supermarkets sustainable seafood policies in a simple league table. There have been some minor changes in position at the lower end of the table, but this does not demonstrate the improvements that have been made overall in seafood retailing. Last year, only the top two supermarkets had good scores, with Sainsbury's in third place, just scraping a pass mark. This year, only two supermarkets have fail scores for their policies.

At the top, M&S, Waitrose and Sainsbury's continue to hold the high ground. Encouragingly, rather than being content to rest on their laurels, each has continued to set and implement higher goals for seafood sourcing. Waitrose and M&S continue to battle for top position with comprehensive and transparent policies for all their seafood ranges, and their support and promotion of sustainable seafood procurement within the industry. M&S continues to hold first position primarily because it sells only its own brand of seafood and its policy covers every piece of seafood sold in its stores from fish fillets to sandwich fillings. All other UK supermarket policies cover only their own brand ranges, and none have yet revealed plans to review the sustainability of the other brands they sell.

Sainsbury's, in third place overall (but first among the four biggest retailers), is also one of the most improved. Its sustainable seafood team has worked hard over the past year to develop a comprehensive seafood policy for both wild-caught and farmed seafood that will have the retailer snapping at the heels of the leaders within a relatively short time. More importantly, with such a large share of the seafood retail

Table 11.1
Ranking of the sustainability of supermarkets' seafood

Supermarket	Sustainability of wild-caught seafood	Sustainability of farmed seafood	General issues*	Rank and grade 2006	Rank and grade 2005
M&S	A	A	A	1	1
Waitrose	A	A	B	2	2
Sainsbury's	B	B	B	3	3
Co-op	C	B	C	4	4
ASDA	C	D	C	5	9
Morrisons	C	D	C	5	8
Tesco	C	D	C	5	6
Somerfield	D	D	D	8	5
Iceland	E	E	E	9	7

*General issues: the brands and ranges of seafood covered by seafood procurement policies; transparency of policies and their implementation; and promotion of sustainable seafood.

● excellent ● good ● pass ● fail

market, Sainsbury's policies will have a significant impact on the sustainability of the seafood industry.

The Co-op has been quietly but steadily working on improving its policies throughout the year and, with a more fully developed aquaculture policy than other supermarkets lower in the table, retains its fourth place in the league table.

At the other end of the spectrum, there has been a race away from the bottom of the league table towards being at least in line with the new retail industry standards. Little now separates Tesco, ASDA and Morrisons. Each of these big retailers has introduced a solid sustainable seafood policy for wild-caught fish, which are being rolled out through their seafood ranges in varying ways, beginning with fresh fish. However, they still need to implement sustainable aquaculture policies for farmed seafood. ASDA, with no clear policy on seafood sourcing last year, is also one of the much improved supermarkets. It has chosen to set very public goals for switching all its seafood to MSC-certified within 3–5 years, although how this will be implemented is currently unclear. It has also entered the political debate on fisheries by supporting the Greenpeace call for marine reserves, and by pushing for the reform of fisheries management in the EU. Tesco and Morrisons have taken a different path, choosing to focus on the shorter-term internal goal of working through each of their wild-caught fish ranges to improve its sourcing. Tesco is also seeking ways to use its influence within the fishing industry to improve sustainability. Morrisons continues to sell one of the broadest ranges of seafood, offering a wide choice of sustainable alternatives to its customers.

Iceland and Somerfield are at the bottom of the league table this year. Somerfield has not developed its basic policies further but has followed the major retail chains by delisting some key unsustainable species. Iceland has lagged behind on developing a sustainable seafood policy, largely due to major changes within the company, but is now in the process of finalising its policy and is keen to share it with Greenpeace in the near future.

11.1.2 What does this mean for consumers?

For consumers that want to buy sustainable seafood, the best option is to buy from those supermarkets graded green. They have strong policies that are well on their way to being implemented, and although a few of their seafood lines may not be sustainable, the retailers are working hard to ensure that this situation changes quickly. Those consumers who chose to buy from supermarkets with a yellow grade should do so with caution. Although they have developed good policies on wild-caught seafood, these have primarily been implemented only through their fresh fish counters and pre-packed chilled ranges. Consumers should avoid buying fish from the supermarkets with a red grade until they have implemented strong policies.

11.2 There is more work to do

The primacy of M&S illustrates an important point. The vast majority of improvements in the sustainability of seafood retailing have occurred in the 'own brand' sector, not in the other brand products that supermarkets sell. Even though a supermarket may exercise great caution over the sustainability of products from the fresh counter or in own brand lines, there are still shelves full of other branded seafood products – such as canned tuna and frozen

cod fillets – that lie outside supermarkets' sustainable sourcing policies. This situation will clearly have to change in the future. It will not be possible for retailers to adopt indefinitely a twin-track approach whereby their own products are sustainable while those from another manufacturer are not. Greenpeace will be examining this area with great interest in the next year.

In addition, this report demands stronger commitments within supermarkets' sustainable seafood policies by calling for action on two urgent issues.

Greenpeace demands that supermarkets must:

1. **Take action to radically improve the UK skate fisheries or stop selling skate altogether.**
2. **Stop selling seafood species that are caught by one of the most destructive fishing methods – beam trawling.**

11.2.1 Stop destructive fishing – ban beam trawling

A beam trawl is a type of bottom trawl designed specifically to be dragged along the seabed. Beam trawls are primarily used to target flatfish such as plaice and Dover sole, and prawns and langoustines. They also catch other benthic species such as cod, haddock and skates.

Beam trawling is destructive

The mouth of the net is kept open by a beam up to 12 metres long, which is mounted at each end on skids which travel along the seabed. Chains (for sandy or muddy bottoms) or heavy chain matting (for rocky bottoms) are attached to the lower mouth opening and are dragged over the seabed in front of the net to stir up fish from the seabed into the oncoming net. This heavy fishing gear catches or crushes everything in its path, stirs up sediments, crushes corals and destroys sponge beds.

Beam trawling is wasteful

Beam trawling does not discriminate between species. Anything that is not crushed and left behind is scooped in to the net – unwanted species and young fish that are too small to sell are simply thrown back into the sea, dead or dying. The FAO provides some sobering statistics on beam trawling in the North Sea.¹²³ For example, the North Sea flatfish beam trawl fisheries have discards in the order of 70%, while shrimp and langoustine (scampi) fisheries have discard rates as high as 83%. This translates to about 270,000 tonnes of fish, invertebrates and debris thrown away each year by the Netherlands Dover sole beam trawl fishery alone.

Supermarkets have promised to take action

Supermarkets have made clear promises within their sustainable procurement policies to stop selling fish from fisheries using destructive methods. M&S and Waitrose have set targets to stop selling any species caught by beam trawl, and have already significantly reduced the volume of fish caught by this method. Alternative fishing methods that are considerably less damaging, such as Danish seining, are already in use. Other supermarkets must follow suit if the species caught by this method and the ecosystems they live in are to be protected and managed sustainably.

Supermarkets must:

- **Immediately delist overfished species that are caught using this destructive method, such as Dover sole and plaice.**
- **Stop selling all beam trawled fish within a year.**

11.2.2 Skates must be protected**Skates are vulnerable**

Skates, rays and sharks are elasmobranchs, a class of fish which have skeletons composed entirely of cartilage. Unlike other fish, elasmobranchs copulate and have internal fertilisation. They are also slow growing, mature at a late age, and produce small numbers of young – features that make them highly vulnerable to fishing.¹²⁴

Skates are often caught using destructive methods

Skates are benthic fish – they live within seabed ecosystems. In European waters, skates are primarily caught in fisheries that target a mixture of benthic fish – many of which are overfished species themselves such as cod, haddock, plaice, Dover sole, monkfish, and hake. Skates are mainly caught by bottom trawl (including beam trawl), as well as gillnet and long-line. They are also caught by a few smaller inshore vessels that specifically target skates using similar methods to the mixed fisheries.¹²⁵

As with other bycatch, unwanted skate catches in mixed fisheries, or unwanted species or sizes, are discarded at sea. While it has been suggested that many skates survive being caught and thrown back^{126, 127}, a recent study indicated death rates of over 40%.¹²⁸ As the study looked at post-trawl recovery of skates in captivity, it is likely that the death rate is much higher when returned to the wild. While trying to recover, discarded skates can be consumed or mortally injured by seabirds or seabed scavengers.

Skate fisheries are poorly managed

There are no limits placed on skate landings in European waters, other than in the region covering the North Sea, Skagerrak and the eastern English Channel.¹²⁹ In this area, ICES advises that skate fisheries continue to be managed with a common Total Allowable Catch (TAC) for all species, this TAC should be zero for 2006. Despite ICES advice, the TACs are routinely set far in excess of actual catches and therefore do not limit fishing pressure.¹³⁰

Skates are declining

The first evidence that the conservation of commercial fish species should be taken seriously was not, as many might believe, the decline in Atlantic cod stocks, but the disappearance of the common skate from the Irish Sea – which was first reported in 1981.¹³¹ Since then the barndoor skate has been driven to near extinction by fishing throughout the North-West Atlantic,^{132,133} and four North Sea skate species have severely declined and are now only found in localised pockets.^{134,135} Within the region encompassing the Irish Sea, Bristol Channel and part of the north-east Celtic Sea, there has been an overall decline in skate landings, local disappearances of longnose and white skates, and declines in common skate, thornback ray, blonde ray and painted ray.¹³⁶

Lack of scientific data, and the fact that in Europe skate landings are recorded as a group rather than by individual species, masks the fact some species are declining. Localised extinctions are particularly worrying because they were not discovered until years after they had occurred.

It is now widely recognised that skates are among the most vulnerable of all marine species to overfishing, and management measures must be vastly improved to ensure protection for skates in European waters. Despite the urgency expressed by scientists and conservation groups, and the many reviews and proposals made to introduce specific measures to protect skates, no decisions have been made or measures implemented.

The role of supermarkets

Supermarkets can be the driving force to instigate voluntary management regimes, pushing local UK fisheries which target skate to move towards sustainability at a faster rate than is currently being pursued by government.

Supermarkets should not sell any skates unless they are actively engaged with, and providing funding for, industry and conservation groups to improve the scientific knowledge and management of skate fisheries. The ultimate goal must be the development of truly sustainable skate fisheries around the UK.

Supermarkets must:

- **Only buy skate species that are considered by a reputable scientific source to be stable or increasing in number, or are listed no higher than the Lowest Concern category on the IUCN red list.**
- **As a priority: buy from less destructive fishing methods, and not buy skate from beam trawlers.**
- **As a priority: buy from local UK fishers actively involved in research programmes, such as survival studies.**
- **Invest a set percentage of profits for skate sales back into skate research.**
- **At a minimum: buy from local UK fishers actively involved in voluntary management and reporting programmes, including reporting of landings and discards of skates by species and sizes.**

Supermarkets must withdraw from buying skate within one year (from October 2007) if:

- **no voluntary management of skate fisheries has been implemented;**
- **no skate breeding and nursery grounds have been protected;**
- **no research into the survival rates of skates following discarding is instigated;**
- **studies show that stocks of the targeted species are decreasing; and**
- **studies show that declining species are not being protected.**



Supermarkets must clearly label their seafood with details of the species name, place of capture, and method of catch.

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APPENDIX 1 – GLOSSARY

Aquaculture	Cultivation or farming of any aquatic species – marine or freshwater, plant or animal.	Data Deficient	Presumed to be at some risk of extinction, but there is inadequate information to make a direct, or indirect assessment of this risk based on its distribution and/or population status (IUCN definition).
Beam trawl	A type of bottom trawl in which the horizontal opening of the net is provided by a beam, made of wood or metal and mounted at each end on guides or skids which travel along the seabed. Used mainly for flatfish and shrimp fishing.	Demersal	Of a fish or other organism: living near or on the seabed. Of a fishery, etc: operating within this zone. Demersal fish include haddock and cod and flatfish.
Benthic	Bottom-dwelling.	Dredge	Gear used in fishing for shellfish, consisting of a rugged triangular steel frame and tooth-bearing bar, behind which a mat of linked steel rings is secured. A heavy netting cover joins the sides and back of this mat to form a bag in which the catch is retained. Shellfish such as scallops are raked out of sand or gravel and swept into the bag. Several dredges are towed together from a tow bar and larger vessels generally tow two bars.
Bottom trawl	A trawl designed to work at the sea bottom. The lower edge of the net opening drags along the seabed, and is normally protected by a thick ground rope and ballasted with chains, sinkers, rubber discs, bobbins, etc. Bottom trawls include low-opening trawls for demersal species such as beam trawls and shrimp trawls, and high-opening demersal trawls for semi-demersal or pelagic species.	Driftnet	A net kept at or below the surface by numerous floats, that drifts with the current, freely or with the boat to which it is attached. May be used close to the bottom (eg shrimp driftnet) or at the surface (eg herring driftnet), usually across the path of migrating fish schools. Fish strike the net and become entangled in its meshes. Also known as drifting gillnets , driftnets are associated with a high level of bycatch .
Brood stock	Eggs, juveniles or adults of a species, from which a first or subsequent generation may be produced in captivity, whether for growing in aquaculture or for release to the wild for stock enhancement.	EII	Earth Island Institute.
Bycatch	The part of a catch other than the adults of the target species, which is taken incidentally. Some or all of it may be returned to the sea as discards, usually dead or dying.	Endangered	Not Critically Endangered , but facing a very high risk of extinction in the wild in the near future (IUCN definition).
Cetacean	A marine mammal of the order <i>Cetacea</i> , including whales, dolphins and porpoises.	Ethical Trading Initiative	(ETI). An alliance of companies, NGOs and trade union organisations, set up to promote and improve the implementation of corporate codes of practice covering supply chain working conditions.
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora.	EU	European Union.
Critically Endangered	Facing an extremely high risk of extinction in the wild in the immediate future (IUCN definition).	FAO	Food and Agriculture Organisation of the United Nations.
Danish seine	A fishing net with a conical net bag with two relatively long wings. Two long heavy ropes, one attached to each wing, are used to encircle a large area of the seabed to herd the fish into the net and then to haul the net in. Used for benthic fish such as flatfish.		

Fishmeal	Protein-rich meal derived from processing whole fish (usually small pelagic fish, and bycatch) as well as by-products from fish processing plants. Used mainly as feeds for poultry, pigs and carnivorous aquatic species.	MSC	Marine Stewardship Council.
Ghost nets	Lost or abandoned nets that continue to entangle marine creatures.	Near Threatened	At a lower risk of extinction in the wild but close to qualifying for the Vulnerable category (IUCN definition).
Gillnets	Non-towed nets used to fish on the surface, in mid-water or on the seabed according to design, ballasting and buoyancy. Fish are gilled or entangled in the netting. Gillnets are used either alone or in large numbers placed in a row such as for trammel nets . Associated with ghost netting and high bycatch .	NGO	Non-governmental organisation.
Hand-line	A type of fishing that uses lines and hooks from a stationary or moving boat. Because hauling is slow, mechanised systems have been developed to allow more lines to be worked by a smaller crew. This method is more selective than other types of fishing in terms of species and size, and provides high quality fish. The method can be used on spawning fish as they normally only bite after completion of spawning.	Nursery	An area where juvenile fish live and grow.
ICES	International Council for the Exploration of the Sea.	Overfished	A stock is considered overfished when exploitation is over an explicit limit beyond which the population may fall to a level too low to ensure reproduction at a rate sufficient to maintain it.
IUCN	World Conservation Union (formerly the International Union for Conservation of Nature and Natural Resources).	Pair trawl	A large pelagic trawl towed between two boats. Associated with bycatch of marine mammals.
IUU fishing	Illegal, unreported and unregulated fishing. Also known as pirate fishing.	Pelagic	Of a fish or other organism: spending most of its life in the mid-water, with little contact with or dependency on the seabed. Pelagic fish include herring and sardine.
Long-line	A type of fishing gear consisting of short lines carrying hooks, attached at regular intervals to a longer main line which is laid on the bottom or suspended horizontally with the help of surface floats. Main lines are up to 150 km long and can carry several thousand hooks. Commonly used for tuna.	Pelagic trawl	A trawl designed to work in mid-water, targeting pelagic fish. The front net sections are often made of very large meshes or ropes, which herd the fish towards the back of the funnel-shaped net. Pelagic trawls may be towed by one or two (pair trawl) boats. Associated with bycatch of marine mammals.
Minimum landing size	(MLS). A fishery management control on size at landing (or in the market). Intended to minimize the catch of small fish or juveniles to give them a better chance to grow and reproduce before being vulnerable to fishing.	Pole-and-line	A fishing method in which surface schooling fish are attracted to a vessel and driven into active feeding behaviour by throwing live or dead bait into the water and spraying water onto the sea surface to simulate the escape of small prey. Poles and lines with barbless hooks are used to hook the fish, which are pulled on board by manual or powered devices. Also known as bait-boat fishing, this method is used worldwide to capture surface-schooling tuna such as skipjack and albacore.

Pots	Traps to catch fish or crustaceans, taking the form of cages or baskets with one or more openings or entrances. Usually set on the bottom, with or without bait, singly or in rows, connected by ropes (buoy-lines) to buoys on the surface showing their position. Pots are also known as creels. Modern 'parlour pots' are more complex and fitted with 'pot-locks' to prevent escape. Modern materials and mechanised hauling systems mean that pots can be left on the seabed for longer than traditional willow pots, and many more can be set and hauled. Pot buoy-lines are known to entangle marine mammals.	Stock	A population from which catches are taken by a fishery. A stock is usually defined in terms of a particular population more or less isolated from other populations of the same species and hence self-sustaining.
Purse seining	A method of fishing in which fish are encircled with a large 'wall' of net, which is then drawn together to retain the fish by using a line at the bottom, which enables the net to be closed like a purse. Commonly used to catch schooling fish such as tuna, mackerel and herring.	Stock status	Assessment of the situation of a stock . The FAO express this as: protected, under-exploited, intensively exploited, fully exploited, over-exploited, depleted, extinct or commercially extinct.
Quota	A share of the TAC for a given fishery, allocated to an operating unit such as a country, a vessel, a company or an individual fisherman (individual quota), depending on the system of allocation. Quotas may or may not be transferable, inheritable or tradable.	Total allowable catch	(TAC). The catch allowed to be taken from a resource in a specified period (usually a year), as defined in the management plan. The TAC may be allocated to the stakeholders in the form of quotas , as specific quantities or proportions of the TAC.
Seafood labelling laws	EU labelling laws apply to raw whole and filleted fish, including frozen fillets, and raw shelled or unshelled shellfish. Consumers must be supplied with the: <i>commercial name</i> : each EU Member State has established its own list of commercial names applicable; <i>production method</i> : caught wild at sea or in fresh water, or farmed; and <i>FAO area</i> : where the fish was caught or country it was farmed in. The legislation does not cover packaged and processed seafood where other ingredients have been added or the seafood has been cooked – such as canned seafood, breaded fillets and fish pies. Here the source information relates to the origin of the final product, not the raw material. In addition, the actual species name is not required – the general terms 'fish' or 'white fish' can be used on the ingredient label for a variety of processed seafood products – such as sauces, fish fingers and surimi.	Trammel net	Bottom-set net made with three layers of netting, the two outer walls being of a larger mesh size than the loosely hung inner panel. The fish get entangled in the inner small-meshed panel after passing through one of the outer walls.
		Trawl	A funnel-shaped net that is towed through the water by one or more vessels.
		Trolling	A surface and sub-surface fishing method in which lines fitted with baits or lures are trailed near the surface or at a certain depth by a vessel. Several lines are usually towed at the same time. Commonly used for tuna and marlin.
		Vulnerable	Not Critically Endangered or Endangered , but facing a high risk of extinction in the wild in the medium-term future (IUCN definition).

APPENDIX 2 – COMMON NAMES AND SCIENTIFIC NAMES

Alaska pollock	<i>Theragra chalcogramma</i>	Dover sole	<i>Solea solea</i>
Alaska salmon	<i>Oncorhynchus keta</i> <i>Oncorhynchus kisutch</i> <i>Oncorhynchus gorbuscha</i> <i>Oncorhynchus nerka</i> <i>Oncorhynchus tshawytscha</i>	Eel	Various <i>Anguilla</i> species including the European eel <i>A. anguilla</i>
Albacore tuna	<i>Thunnus alalunga</i>	Eagle rays	Species of the Myliobatidae family
American monkfish	<i>Lophius americanus</i>	Electric rays	Species of the Torpedinidae family
Anchovy	Various <i>Engraulis</i> species including the European anchovy <i>E. encrasicolus</i>	European Hake	<i>Merluccius merluccius</i>
Arrow squid	<i>Nototodarus sloani</i> <i>Nototodarus gouldi</i>	European monkfish	<i>Lophius piscatorius</i> <i>Lophius budegassa</i>
Atlantic halibut	<i>Hippoglossus hippoglossus</i>	Greenland halibut	<i>Reinhardtius hippoglossoides</i>
Barndoor skate	<i>Raja laevis</i>	Grey mullet	Various species of the genera <i>Chelon</i> , <i>Liza</i> and <i>Mugil</i>
Barramundi	<i>Lates calcarifer</i>	Grouper	A wide variety of species of the subfamily <i>Epiphelinae</i>
Bigeye tuna	<i>Thunnus obesus</i>	Haddock	<i>Melanogrammus aeglefinus</i>
Blonde ray	<i>Raja brachyura</i>	King scallops	<i>Pecten maximus</i>
Brazilian monkfish	<i>Lophius gastrophysus</i>	Lane snapper	<i>Lutjanus synagris</i>
Brill	<i>Scophthalmus rhombus</i>	Langoustine	<i>Nephrops norvegicus</i>
Brown trout	<i>Salmo trutta</i>	Lemon sole	<i>Microstomus kitt</i>
Cod	<i>Gadus morhua</i>	Ling	Various <i>Molva</i> species
Conger	Various <i>Conger</i> species including the European conger <i>C. conger</i>	Longnose skate	<i>Dipturus oxyrinchus</i>
Common mussels	<i>Mytilus edulis</i>	Lumpfish	<i>Cyclopterus lumpus</i>
Common skate	<i>Dipturis batis</i>	Mahi mahi	<i>Coryphaena hippurus</i>
Cubera snapper	<i>Lutjanus cyanopterus</i>	Marlin	Major commercial species include: <i>Makaira nigricans</i> <i>Makaira indica</i> <i>Makaira mazara</i> <i>Tetrapturus albidus</i> <i>Tetrapturus audax</i>
Cuckoo ray	<i>Leucoraja naevus</i>	Mutton snapper	<i>Lutjanus analis</i>
Dab	<i>Limanda limanda</i>	New Zealand deep-sea cod	<i>Mora moro</i>
Dogfish	<i>Squalus acanthias</i> is the most common species landed in the UK; however, various other small shark species can also be marketed as dogfish under UK labelling laws		

New Zealand green-lipped mussels	<i>Perna canaliculus</i>	Skate	The correct common name for the Rajidae family is skate; the term ray should be reserved for the other elasmobranch families of <i>Myliobatidae</i> (eagle rays), <i>Dasyatidae</i> (sting rays), and <i>Torpedinidae</i> (electric rays). In European waters, however, the long-nosed rajid species are colloquially known as skates and short nose species as rays, and this tends to be reflected in the common names.
New Zealand hoki	<i>Macruronus novaezelandiae</i>		
New Zealand red snapper	<i>Pagrus auratus</i>		
Pacific cod	<i>Gadus macrocephalus</i>		
Pacific halibut	<i>Hippoglossus stenolepsis</i>		
Painted ray	<i>Raja microocellata</i>		
Plaice	<i>Pleuronectes platessa</i>		
Prawns – cold water species	Various including: <i>Crangon crangon</i> <i>Pandalus borealis</i> <i>Pandalus jordani</i>	Skipjack tuna	<i>Katsuwonus pelamis</i>
Prawns – warm-water species	Various <i>Penaeus</i> and <i>Parapenaeopsis</i> species including the widely farmed <i>Penaeus chinensis</i> , <i>P. monodon</i> and <i>P. vannamei</i>	South African Cape Hake	<i>Merluccius capensis</i> <i>Merluccius paradoxus</i>
Red mullet	Various species of the genus <i>Mullus</i>	Spotted ray	<i>Raja montagui</i>
Rainbow trout	<i>Oncorhynchus mykiss</i>	Starry ray	<i>Amblyraja radiata</i>
Redfish	<i>Sebastes marinus</i> <i>Sebastes mentella</i>	Sting rays	Species of the <i>Dasyatidae</i> family
Salmon	<i>Salmo salar</i>	Swordfish	<i>Xiphias gladius</i>
Sandeel	Various species of the genera <i>Hyperoplus</i> , <i>Gymnammodytes</i> and <i>Ammodytes</i>	Tarakihi	<i>Nemadactylus macropterus</i>
Sea bass	<i>Dicentrarchus labrax</i>	Thornback ray	<i>Raja clavata</i>
Sea bream	<i>Sparus aurata</i>	Tilapia	Various species of the genera <i>Tilapia</i> and <i>Oreochromis</i>
Silk snapper	<i>Lutjanus vivanu</i>	Torbay sole	<i>Glyptocephalus cynoglossus</i>
		Turbot	<i>Psetta maxima</i>
		Vermilion snapper	<i>Rhomboplites aurorubens</i>
		Western Australia rock lobster	<i>Panulirus cygnus</i>
		White skate	<i>Rostroraja alba</i>
		Whiting	<i>Merlangius merlangus</i>
		Wolf-fish	<i>Anarhichas lupus</i>
		Yellowtail snapper	<i>Ocyurus chrysurus</i>
		Yellowfin tuna	<i>Thunnus albacares</i>

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