

So Why Is the Fisherman Here with We Farmers?

Global Seafood Markets

April 2017



So Why Is the Fisherman Here with Us Farmers?

My Early Farming Experiences Poddy Lamb



Daily chasing, catching, and feeding poddy lamb

(Connemara Ireland 1974)

So Why Is the Fisherman Here with Us Farmers?

My Early Farming Experiences Annie Kerrigan



“Guiding Hand” of a Strong Irish Woman Farmer

Seafood Opportunities and Challenges

Agenda/discussion points

- So who is the National Fisheries Institute
- Harvesting a fish
- Getting a fish to market
- Selling a fish



What Is a Lobbyist?

1. Take our piece of paper and pen or pencil
2. In the next 7 seconds draw
3. a lobbyist
4. Share the picture with your table mates

What Is a Lobbyist?

All depends on your viewpoint



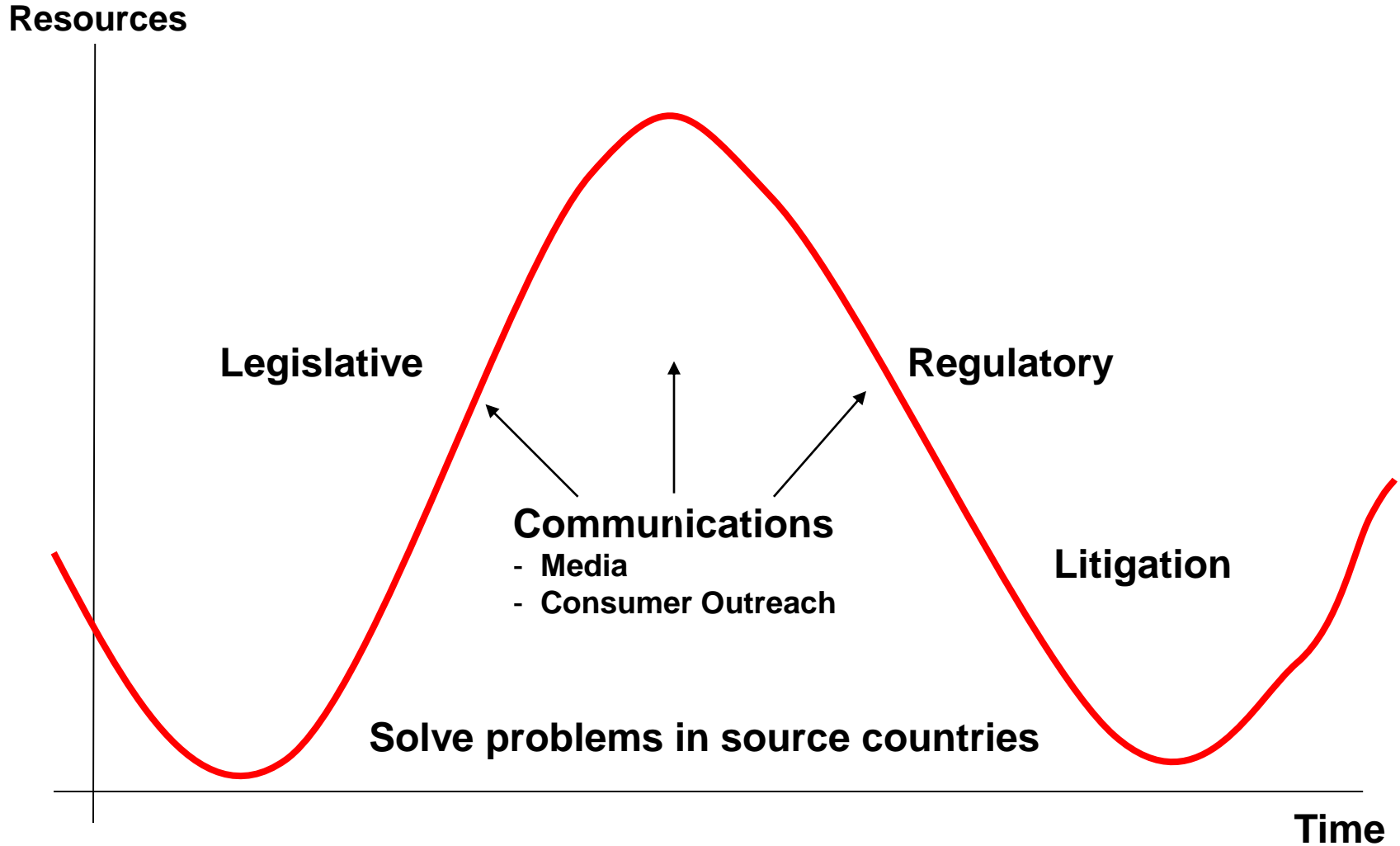
National Fisheries Institute

Who we are

- Voice for seafood community in Congress, White House, regulatory agencies, with the media, before the Court, in source countries, and in the marketplace
- Represent industry from “water to table”
- Committed to economic sustainable use of resources
- Operate globally
- Rely heavily on research to determine with whom and how best to communicate

National Fisheries Institute

Issues are our products



National Fisheries Institute

Where we spend our resources (time, staff, outside services)

	<u>Legislative</u>	<u>Regulatory</u>	<u>Comms</u>	<u>Courts</u>
Health benefits	Low	High	High	Medium
Aquaculture	Low	Medium	High	Low
Trade	High	High	High	High
Sustainability	Medium	Low	High	High
Economic integrity	Low	High	High	Low



National Fisheries Institute

Our View of Lobbying: Be Organized and Be Serious

“Ten people who speak make more noise than ten thousand who are silent.”



“The right to be heard does not automatically include the right to be taken seriously.”

So Let's Bring a Fish to Market

NUFFIELD
INTERNATIONAL
FARMING SCHOLARS



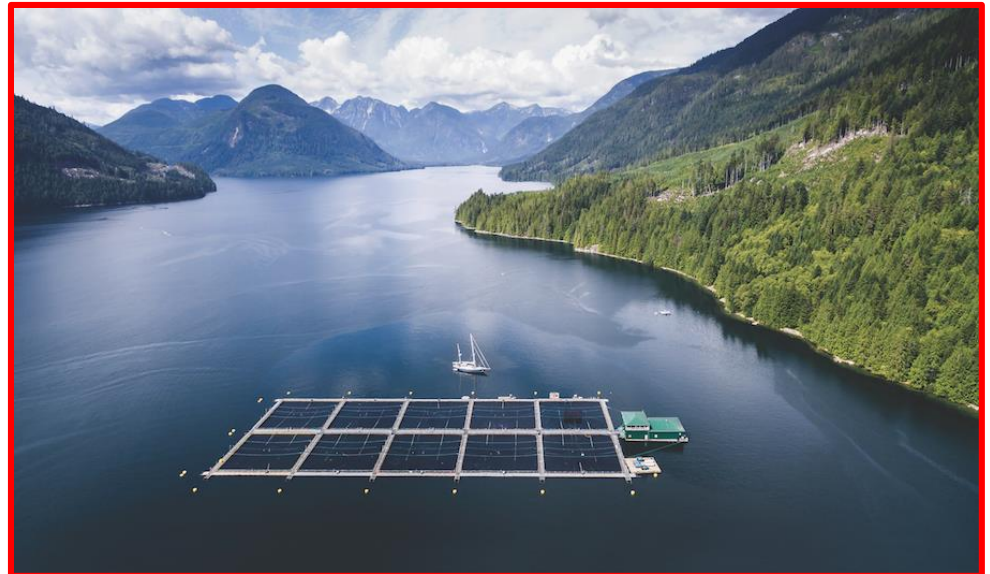
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Catching Our Fish: Two Methods of Production



World's most dangerous job

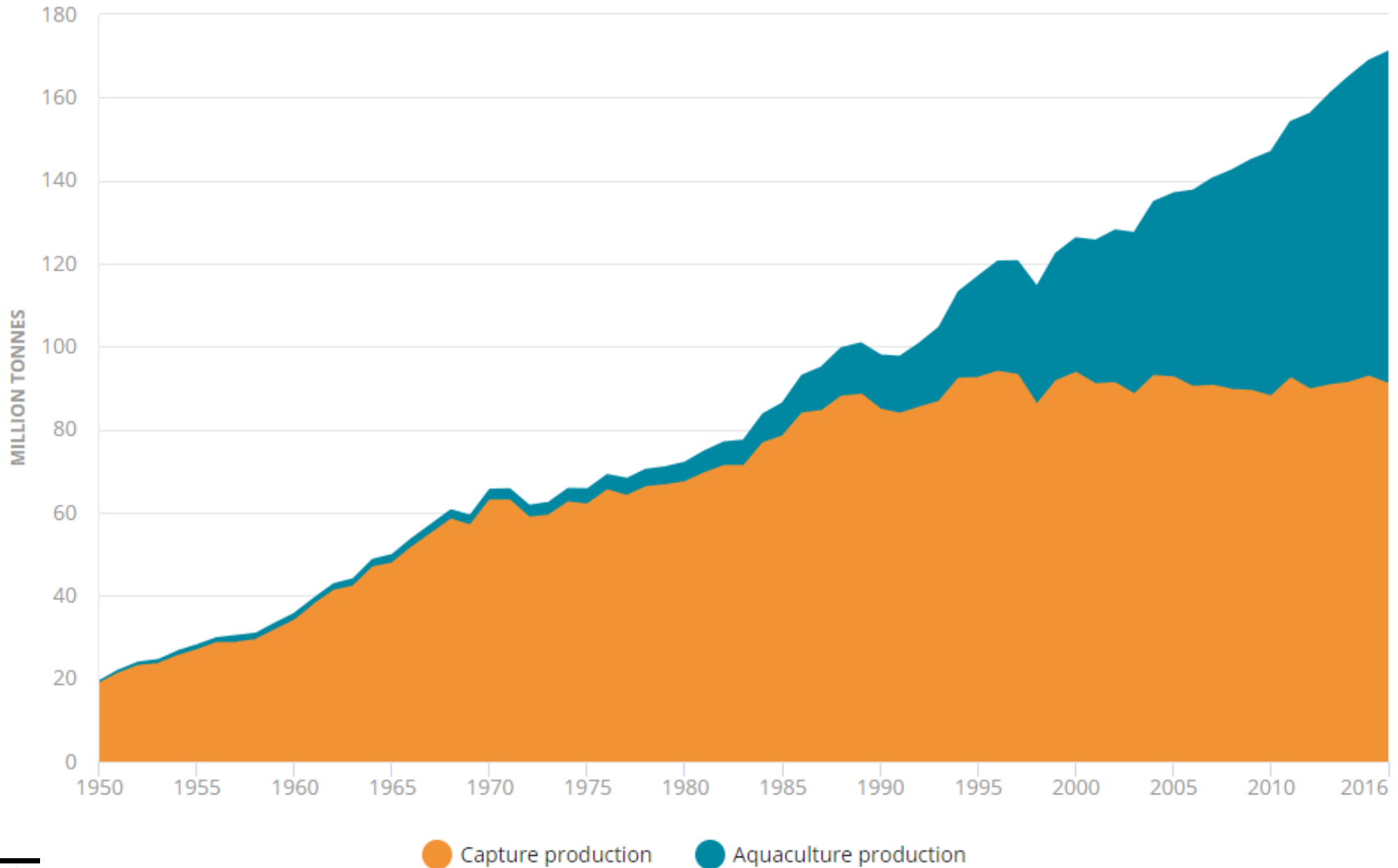
Future of seafood industry



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Catching Our Fish: Methods of Production

World capture fisheries and aquaculture production



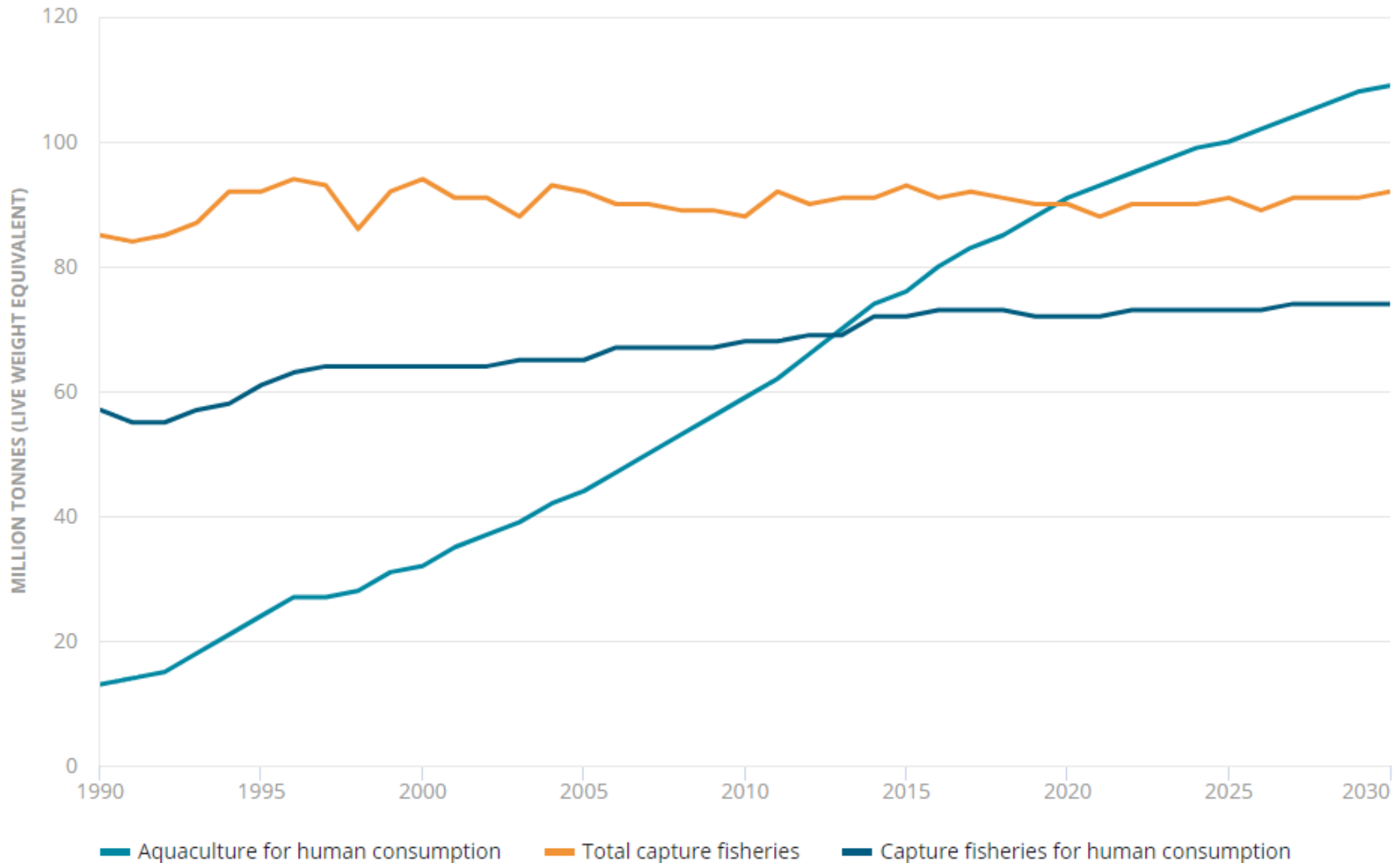
● Capture production ● Aquaculture production



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Catching Our Fish: Methods of Production

Global capture fisheries and aquaculture production, 1990–2030

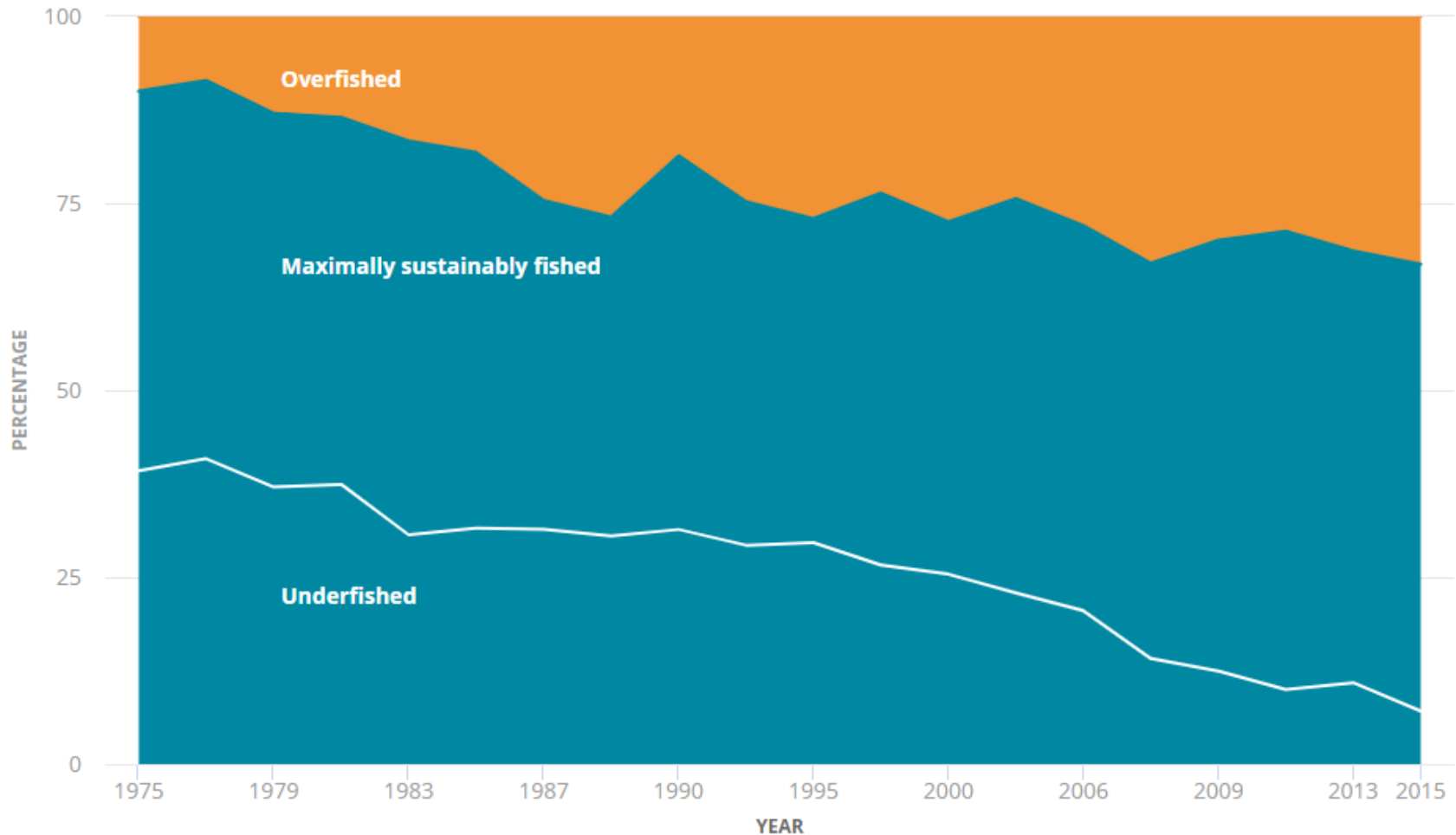


NOTE: Excludes aquatic mammals, crocodiles, alligators and caimans, seaweeds and other aquatic plants

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Catching Our Fish: Sustainability Issues – Difficult Chart

Global trends in the state of the world's marine fish stocks, 1974-2015



Biologically unsustainable Biologically sustainable

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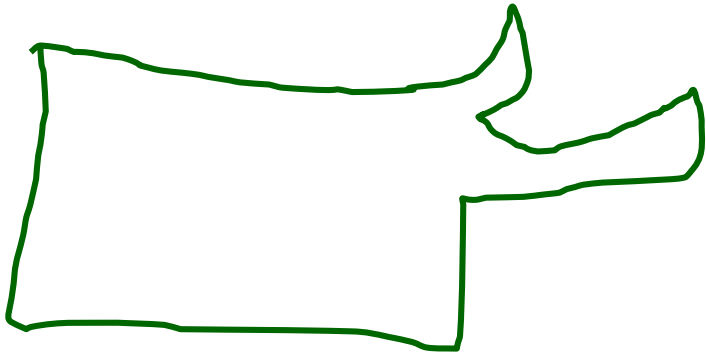
Catching Our Fish: Sustainability Issues – Perspectives Matter

1. Take our piece of paper and pen or pencil
2. In the next 5 seconds draw
3. a map of the United States
4. Share the map with your table mates

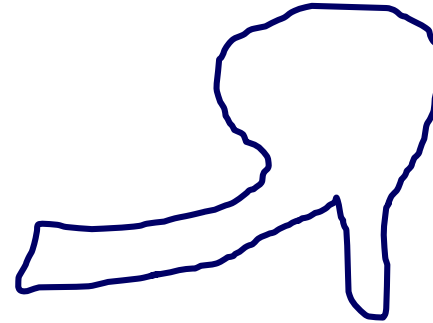


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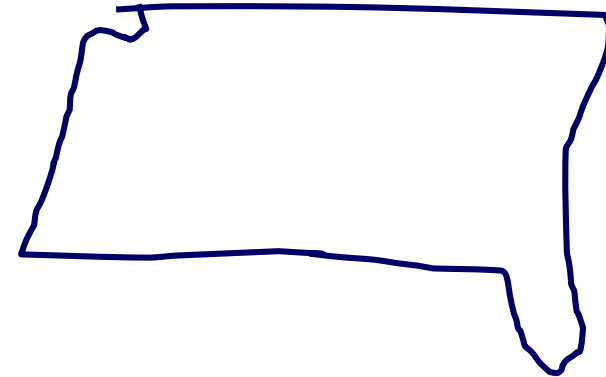
Catching Our Fish: Sustainability Issues – Perspectives Matter



If from Boston



If from Alaska



If from Texas

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Catching Our Fish: Sustainability Issues – Perspectives Matter

Both are important, but Mexican papaya farmer does not feed the same number of people that an Australian beef rancher does ... so how things are measured and communicated matters enormously.



0.95 MT

versus



2,280,000 MT



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Catching Our Fish: Sustainability Issues

	<u>Fishery</u>	<u>MT</u>	<u>Status</u>
1	Stock A	10,000	Underfished
2	Stock B	1,000,000	MSY
3	Stock C	550,000	MSY
4	Stock D	125,000	Overfished
5	Stock E	50,000	MSY
6	Stock F	280,000	MSY
7	Stock G	90,000	MSY
8	Stock H	35,000	Overfished
9	Stock I	20,000	Overfished
10	Stock J	65,000	MSY
		2,225,000	



Scientists report on fishery “stocks”



The UN Food and Agriculture Organization reported today that **90% of the globe's fisheries remain overfished or cannot support additional fishing pressure.** They further stated that only 1 in 10 fisheries are underused. Joe Activist warned the report is a *“caution to us all that we cannot fish at this level and expect our grandchildren to eat.”*

MSY = Maximum Sustainable Yield

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Catching Our Fish: Sustainability Issues

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		2,225,000	

THE GLOBE AND MAIL

The UN Food and Agriculture Organization reported today that the **fisheries that produce 91% of the world's seafood are managed sustainably**. Mr. Jonathan Wilkinson, Canada's Minister of Fisheries, celebrated the news, commenting, *"We have been good stewards of our fisheries for decades. We are proud that we will provide healthy food to Canadian and the world's families for centuries."*

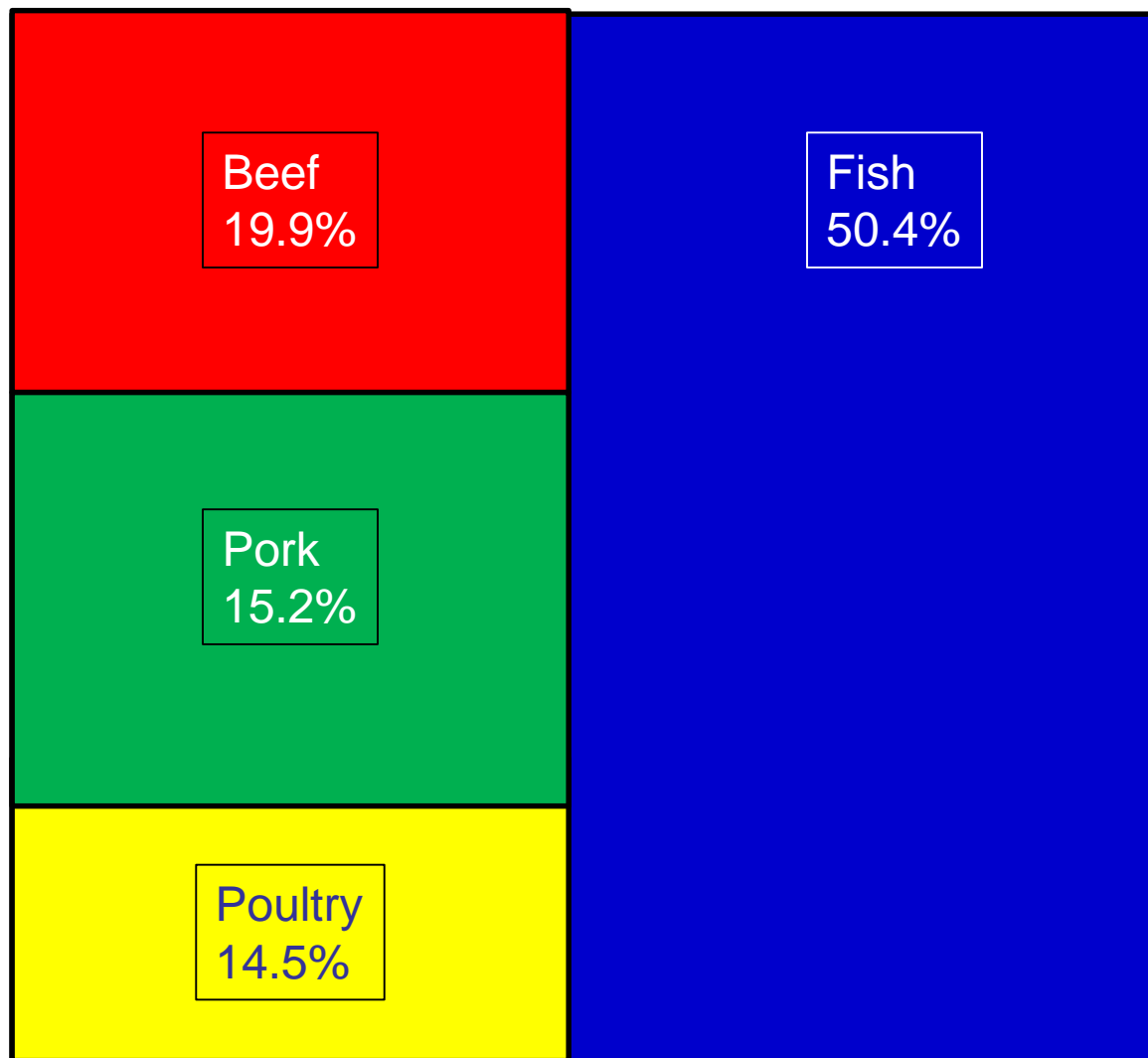
Shift from scientists' technical language to concepts your aunt understands

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Bringing Our Fish to Market

International Trade in Protein
(% of value)

Seafood is by far the most traded of the food commodities



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Bringing Our Fish to Market



Which countries are the major marine capture fisheries producers?

1. China
2. Indonesia
3. United States of America
4. Russian Federation
5. Japan



Which countries are the major aquaculture producers?

1. China
2. India
3. Viet Nam
4. Bangladesh
5. Egypt



Major importers of fish and fishery products:

1. United States of America
2. Japan
3. China
4. Spain
5. France



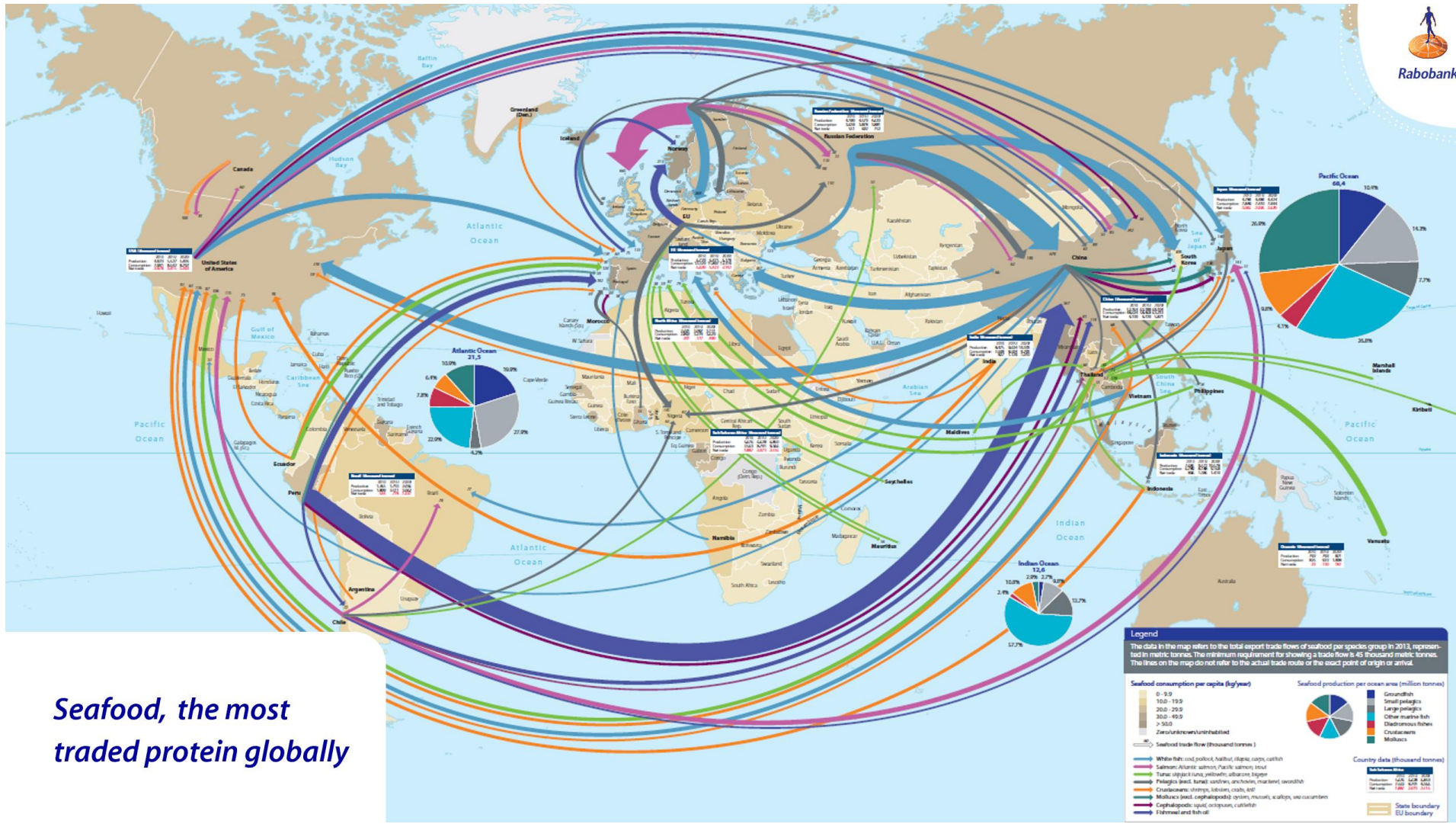
Major exporters of fish and fishery products:

1. China
2. Norway
3. Viet Nam
4. Thailand
5. United States of America



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Bringing Our Fish to Market



Seafood, the most traded protein globally



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Bringing Our Fish to Market: Current US Trade Policies



President Trump trade policies impacting farmers and fishers

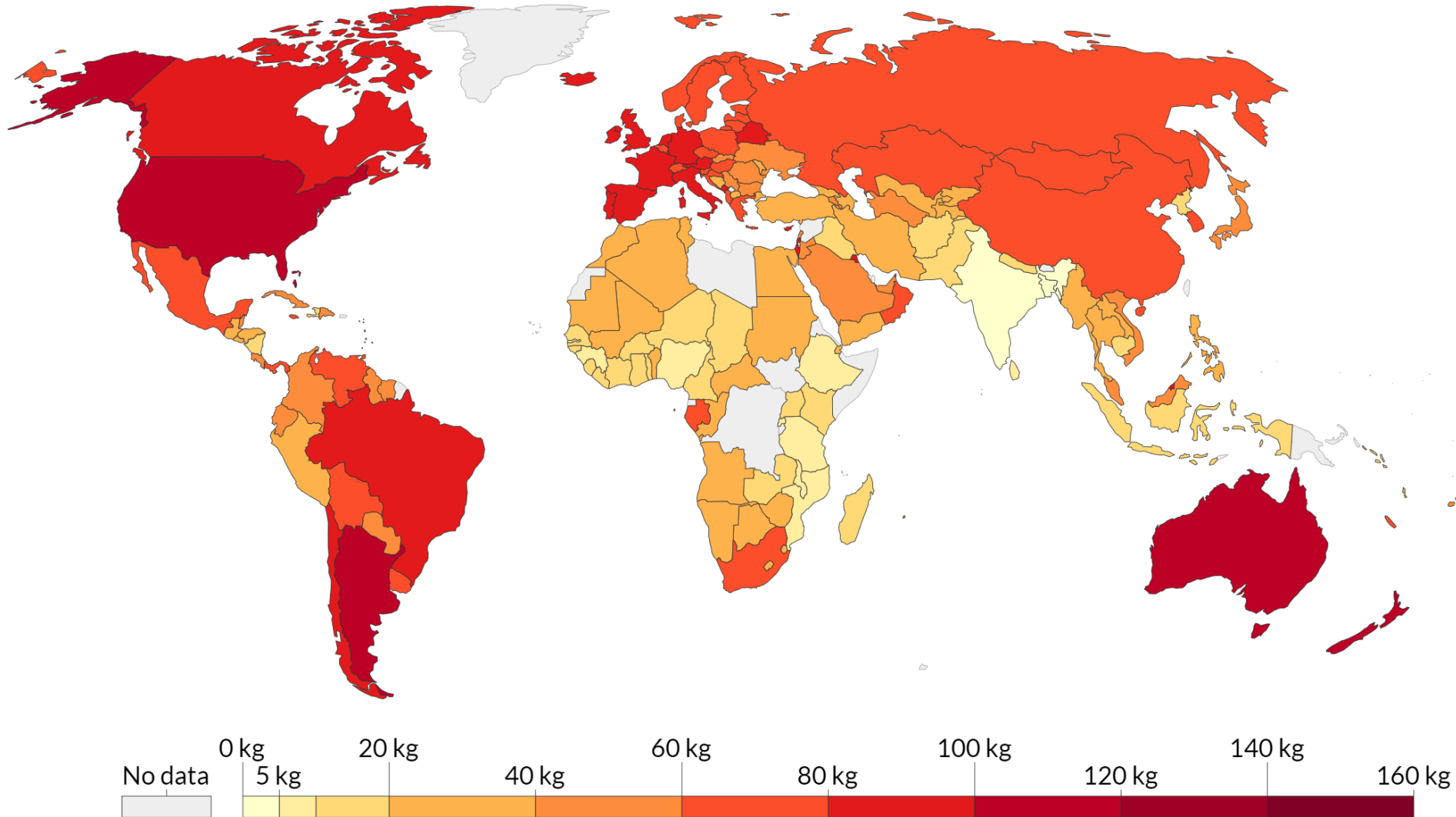
Coalition of farmers (and others working behind the farmers) has challenged President Trump to deliver on promise

In seafood, US has 0% or *de minimus* tariffs, but face 25-40% tariffs in export markets



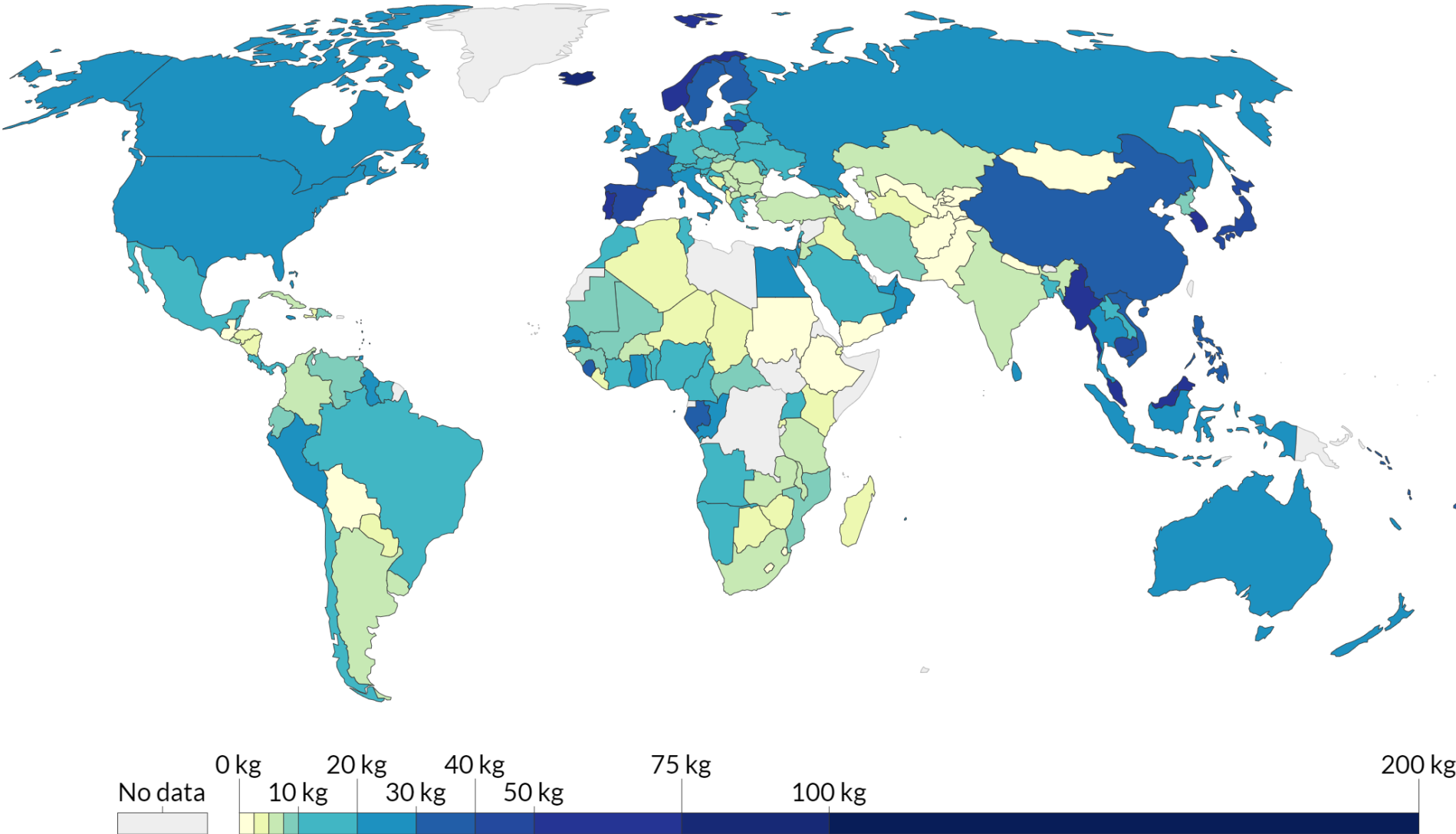
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Selling Our Fish: Meat per Capita Consumption



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Selling Our Fish: Seafood Per Capita Consumption



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Selling Our Fish: Types of Fish in North America

- Shrimp
- Salmon
- Canned tuna
- Tilapia
- Pollock
- Pangasius
- Cod
- Crab
- Catfish
- Clams



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Selling Our Fish: North American Forms and Channels



In Restaurants



At Home



Fresh



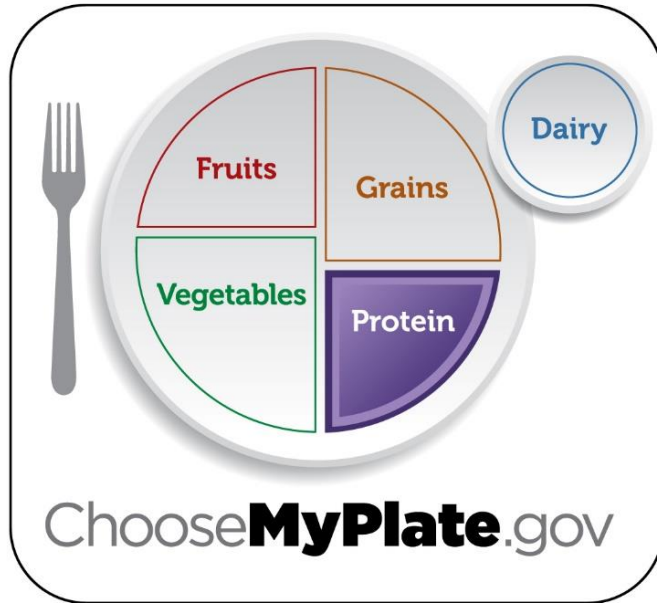
Frozen



Shelf Stable

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Selling Our Fish: US Government Policy as Foundation



“Shift to eating seafood at least two times each week by swapping in fish for meat and poultry.”

Dietary Guidelines for Americans

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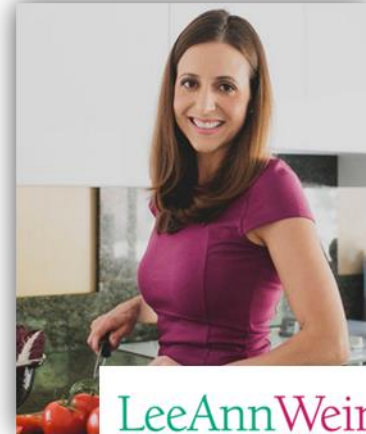
Selling Our Fish: Building Coalitions with Third Parties and Social Media



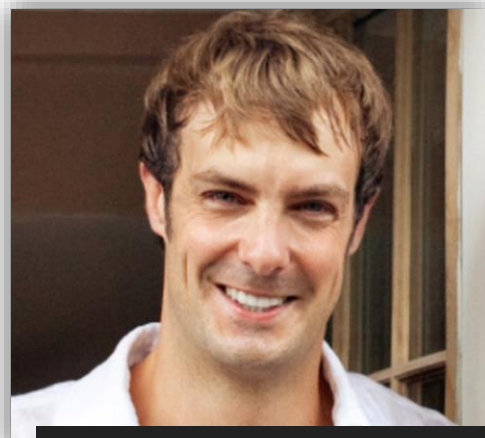
Dr Nita



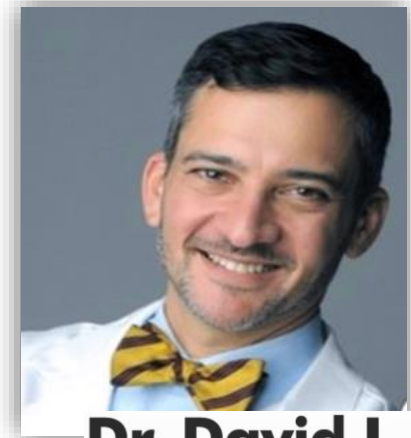
Hispanic Food Communications Inc.



LeeAnn Weintraub | MPH, RD
Your Nutrition Guide™
NUTRITION COUNSELING & CONSULTING



Barton Seaver | Future of Fish



Dr. David L. Hill
pediatrician • author • speaker • dad

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Selling Our Fish: Seafood as an Experience, not a Medicine



Dish on Fish

December 8, 2016 · 🌐

You don't have to be Italian enjoy the gastronomic and traditional Feast of the Seven Fishes! Don't stress over specifics. Just head over to our blog for recipe ideas that will help make your seafood spread unforgettably delicious!
<https://goo.gl/4m94Ev>




“You don’t have to be Italian to enjoy the gastronomic and traditional Feast of the Seven Fishes...”




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Selling Our Fish: Engaging Consumers with Facts

Kathy Hawthorn We've seen horrible pictures of farmed tilapia we stopped buying it. Can we buy tilapia not raised under those conditions?


Like · Reply ·  1 · January 3 at 9:37pm


 **Clyde S. Gorsuch** I feel the same way about tilapia or for that matter, any seafood from SE Asia.

Like · Reply · January 4 at 8:47am

 **Dish on Fish** Hi Kathy, thank you for being a fan of Dish on Fish. Rest assured tilapia is a safe and healthy fish that is one of the most popular on American dinner plates. Unfortunately there have been more than a few misleading stories circulating about its whole... [See More](#)

Like · Reply · January 4 at 11:07am

 **Kathy Hawthorn** Thank you guess we should reconsider. We did like this fish alot.

Like · Reply ·  1 · January 4 at 11:53am

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Selling Our Fish: Engaging Associations to Fight Back

Trade associations can be more aggressive with media, as they do not have consumer brands to protect allowing you to remain “above the fray.”

Goal is not to correct the immediate story, as much as to discipline the reporter and editor to never again publish a negative story about the seafood community (if facts are wrong)

FORBES' FICTION

Forbes
104 items | Feb 20, 2018, 10:55am

Good Catch Touts Tuna That's Better For the Oceans, Safe For The Office

Janet Fargione [@janetfargione](#)
Food & Drink
Former Marine-based and sustainable food industries

Tuna is a perennially popular fish that's long been the filling for sandwiches, the base for casseroles and a top selection at sushi bars. The fish's ubiquitous presence has caught the attention of startups looking to develop more sustainably sourced fish that can be just as sought-after.

Good Catch will launch its first plant-based tuna products in grocery subscription service Thrive Market [this week](#). The company, which more than two years ago began when Chad Samo and his brother, Derek, partnered with Cliff Keen of New Crop Capital and entrepreneurs Marco Zaroff and Eric Schnell to start the brand.

While demand remains high, the supply is dwindling rapidly and the remaining fish can come with problems including high levels of mercury, PCBs and other contaminants in wild caught seafood. Farmed fish come with other issues, including the dangers associated with confinement and overuse of antibiotics, according to FAO data.

Tuna's position as one of the most popular and most over-fished species is one reason the first batch of plant-based seafood brands have focused their initial efforts on the fish.

Skipjack and Albacore stocks, the types of tuna used most often in cans and pouches, are especially robust.

"There's more and more of a general awareness around the mercury load in fish," Samo said.

"Physicians tell pregnant women to avoid it, it's crazy that we still eat this product we live 100 to 110 years of life."

Handwritten Notes:

- Tuna companies work with organizations like the International Seafood Sustainability Foundation (ISSF) to secure the future of our oceans.
- Plant-based products are not seafood.
- The world's leading seafood sustainability experts report that most tuna species in most fisheries around the world are healthy and not in danger of being over-fished.
- FALSE: Pregnant women can and should eat a variety of seafood, including tuna. The Dietary Guidelines for Americans (DGA) recommend eating 2-3 servings of a variety of seafood every week. And the FDA's own research shows that pregnant women can eat a tuna sandwich for breakfast, lunch, and dinner every day risk-free.
- This oft repeated hyperbole illustrates a clear lack of research, suggesting PCB's the "problem" in fish ignores the fact that fish make up only 9% of the PCB's found in the average American diet, while vegetables make up 20%. So, here you have an author profiling a replacement product that delivers more than twice the amount of the contaminant consumers are supposedly trying to avoid.
- The truth is there has never been a case of mercury poisoning from normal consumption of commercial seafood recorded in any American medical journal. That's right, zero cases.

Other elements: A red marker, a small photo of a tuna sandwich, and a SeafoodSource logo.



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Selling Our Fish: Speak to My Wife, not Another Farmer



“Margaret, that 0.0001134% of a metric ton of fish was delicious”

New Zealand fishing harvests 659,552,000 kg of fish

At 40% yield, results in 263,820,800 kg of fish as food

New Zealand fishing provides 2,326,503,113 meals to families each year

We eat meals, not metric tonnes

We are in the food business, not extractives business



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Selling Our Fish: Introduce Yourself with Food You Provide

Hello. My name is Heleen Lansink-Marissen and my family runs a dairy farm in Haaksbergen. We provide Dutch families about 3 ¹/₂ million glasses of milk each year.



So Why Is the Fisherman Here with Us Farmers?

Cassandra's Story of the Farmer and Fisherman



We, better than nearly all others, know the value of wise and sustainable use of resources to feed our families and billions of others.

We need to tell those stories.

So Why Is the Fisherman Here with We Farmers?

John Connelly
jconnelly@nfi.org

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Catching Our Fish: Comparative Sustainability of Proteins

