

Seas for sale

Scandinavian retailers response to need for seafood sustainability



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Greenpeace Nordic 2010.

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Summary

In 2008 Greenpeace Nordic released rankings of retailers in Denmark, Norway and Sweden showing that throughout the region, there was a varied consciousness of retailer's role in relation to depleted fish stocks, overfishing, discards, illegal fishing and destruction of habitats. These are unfortunately practises that retailers indirectly support, if they don't have strong standards and buying principles that secure that they sell only sustainable seafood.

The problems facing our oceans are consequences of a combination of industrial fishing practises and bad politics, but retailers can influence the way the ocean is being managed by implementing standards that secure that they only source seafood from well managed and sustainable fisheries.

Before the Greenpeace rankings, a wide range of unsustainable seafood was sold across the Nordic region. Depleted species like eel and unsustainably beam-trawled plaice were on sale by all retailers in almost all supermarkets, together with unlabeled tuna and tropical shrimps. Based on the limited guidelines for avoiding unsustainable seafood retailers with a better range of seafood from less destructive fishing practices had this mainly based on luck and a limited range of seafood, as none of the Nordic retailers had specific procurement guidelines to secure a sustainable seafood selection.

Now, two years after the first ranking, most Nordic retailers have come a long way. A majority have developed specific seafood procurement policies with environmental guidelines and have removed overfished and depleted fish species from the shelves.

The progress has been most pronounced in Sweden, where many retailers have shown a genuine interest in solving the issue and have worked ambitiously towards a more sustainable range, but also most

Norwegian and Danish retailers have clearly given the issue far more thought than before.

Some retailers have launched real good initiatives to secure a more sustainable range. Examples are cooperation with industry to secure sustainability. Several have also removed eel, introduced pot caught shrimps, removed beam-trawled plaice and started policy processes and educated staff and costumers.

Even though most retailers have shown some progress, there are still a range of issues that needs to be better addressed. As of today no Nordic retailer can secure a full range of sustainable seafood and retailers need to be more specific in their definitions of sustainability, both on wild caught species and species from aquaculture. The sales of a few sustainable seafood products cannot justify the sales of less sustainable seafood and retailers have to control and secure that all seafood lives up to these criteria. Retailers also have to improve the labelling meaning that all seafood is labelled with common and scientific name of the species; the specific stock the seafood was caught from or the farm it was cultivated at; the fishing method used to catch it.

Working with seafood is a very complex matter, and for many Nordic retailers a professional fish buyer and sustainability advisor could be a necessary step to deal with these problems in a more proactive and forward looking way in the future.

In addition to securing their own selection through requirements and dialog with the industry, it is also necessary that retailers make their preferences for sustainable seafood and good fishing practices heard also at the political level. No one benefits from overfishing, coral crushing or massive discarding of marine life on the scales that still are allowed in today's European fisheries and all actors have to take their share and do their best to secure healthy oceans and fish stocks for the future.

Glossary

CFP: [Common Fisheries Policy](#)

FAO: [United Nations Food and Agriculture Organisation](#)

ICCAT: [The International Commission for the Conservation of Atlantic Tunas](#)

ICES: [The International Council for the Exploration of the Sea](#)

MSC: [Marine Stewardship Council](#)

NGO: [Non-Governmental Organization](#)

1. Background

The world's oceans are in a state of crisis. Destructive fishing practices and bad fisheries management are taking a toll on ocean biodiversity and are recognized as a major threat to the global marine environment alongside climate change and ocean acidification. Fish catch statistics from the United Nations Food and Agriculture Organisation (FAO) show that three-quarters of commercially valuable fish stocks are fully exploited, over exploited or depleted. Worldwide up to 90% of stocks of large predatory fish have already been lost, including large tuna, swordfish, cod and halibut. As well as depleting commercial fish stocks, damaging fishing methods are destroying marine ecosystems like coral reefs and killing vast amounts of juvenile fish and non-target species through incidental capture or 'bycatch'. Bottom trawling, for example, with its various combinations of chains, beams and heavy rollers, destroys the seafloor and in some fisheries up to 80% of the catch is thrown away, dead or dying.

However, while there is much talk of improving current fisheries management practices, little has changed. The global seafood industry continues to fish unsustainably and until a stronger demand is made for sustainable seafood, it will continue to do so. Problems like overfishing, depleted stocks, bycatch, discards and destruction of habitats poses a great threat to the world's oceans. Retailers can play a significant role in changing the negative trends in the world's oceans. Added pressure from them will help increase the sustainability of the fishing industry and add political pressure for better management.

Consumers should not be left with a choice to either buy sustainable or unsustainable seafood in their supermarkets and the best way to ensure they only buy sustainable seafood is for supermarkets to ensure they sell only sustainable seafood. At present, consumers who are trying to reduce their impact on marine ecosystems need to develop a fairly detailed understanding of fishing and aquaculture issues in order to make a sustainable seafood choice. However, even with this knowledge in hand, consumers are hampered by the fact that current labelling practices rarely provide the species name, the precise area of catch, or the fishing method used, making it hard to determine sustainability.

Since most sales of seafood goes through the retail sector Greenpeace decided to engage with retailers to add extra pressure onto the fishing sector and managers to secure sustainability of their fishing activities. This was done by asking supermarkets a set of questions related to their sourcing policies for seafood.

Supermarkets have been encouraged to:

Remove the worst by immediately beginning the process of removing the most destructively fished species from their shelves – those listed as being most overfished and caught using wasteful or destructive methods.

Support the best by increasing the range of sustainable seafood they sell – from stocks that are not depleted and using the most sustainable fishing methods – and ensuring these sustainable species are promoted effectively in store, on their websites and in store magazines.

Change the rest by working with suppliers to source fish from only the least depleted stocks, working with fishermen and/or researchers to improve sustainability of fishing methods and rejecting fish from fisheries and suppliers that refuse to change.

Improve seafood labelling by ensuring that all seafood products sold are clearly labelled so that consumers can make a more informed choice about the products they are buying. This means labelling seafood with: the common and scientific name of the species; the specific stock the seafood was caught from or the farm it was cultivated at; the fishing method used to catch it and the vessel that caught it.

The first Greenpeace overview of supermarkets and sustainable seafood was presented in the UK in 2005¹. Since then, supermarket reports and rankings have been released in the UK², Austria, Spain, US³, Poland, Canada, Germany and Scandinavia.

In January 2008 Greenpeace released the first rankings of Swedish, Danish and Norwegian retailers. The results showed that throughout the Nordic region awareness surrounding seafood sustainability among retailers varied. Most retailers were aware of some of the problems with seafood today but they had no systems in place to make sure they did not sell unsustainable seafood.

The results from the Nordic supermarket rankings showed that no retailers had any comprehensive policy to secure that the fish they sold was caught or produced sustainably, and throughout the Nordic region

unsustainable seafood was sold in all supermarkets. Some of the Nordic retailers had after the scandals with illegal cod implemented buying instructions to secure the legality of the cod they sold but those instructions covered cod and not the whole seafood range.

Now, almost a year and a half on, Greenpeace has again engaged retailers to follow up on what they have done since the last ranking, how they have worked with the challenges and how they will continue working to ensure costumers are delivered sustainable seafood in the future.

This report is based on answers from the retailers. Where retailers have not wished to participate it is stated and progresses are based on homepages and limited shelf's surveys.

It is our hope that this report can serve as evidence of progress, encouragement to improve, and inspiration to implement even stronger sustainable seafood sourcing policies in the coming months.

2. The problems with seafood today

2.1 Overfishing

The fishing industry is catching an enormous amount of fish each year. The latest report on the State of the world fisheries and aquaculture resources released in 2008 from the UN Food and Agricultural Organization showed that capture fisheries take out 92 million tons of fish from the world's oceans while aquaculture produces 52 million tons of seafood. The same report also shows that world fish populations are in decline. In 2007, about 80 percent of fish stocks were fully exploited (52%), overexploited (19 percent), depleted (8 percent) or recovering from depletion (1 percent)⁴. Of the top ten species which accounts for about 30% of the worlds marine capture fisheries production in terms of quantity most of the stocks are either fully exploited or overexploited and cannot be expected to produce an increase in catches.⁵

For European waters managed by the European Union this number is even higher.⁶ In July 2007 a report prepared to the European commission concluded that there is a much higher rate of overfishing of stocks in EU waters then average worldwide. One of the major driving forces behind the poor state of European fisheries is related to overcapacity of the fishing fleet, resulting in too many boats catching to few fish and low

The European eel is so severely depleted that only 1-3 % of historical numbers are returning to European rivers to mature⁸

profit for the catching sector. In addition implementation of management schemes have been slow and ineffective. The result for the ecosystem and fish stocks in EU waters is devastating⁷. The

report was so controversial, the Commission tried to keep it from being published. Two years after, little improvements have been made and in 2009 the EU Commissioner for fisheries, Joe Borg stated that 9 out of 10 stocks within EU waters were overfished.

The European eel is also subject to severe mismanagement in European waters. The European eel is so severely depleted that only 1-3 % of historical numbers are returning to European rivers to mature⁸. Some countries, including Norway have stopped or restricted eel fishing due to the depleted nature of the stock. Many countries continue to fish both mature eel for direct sales, or juvenile eel for export to Japan and aquaculture supply. In spite of its eel fishing ban, Norway continues to allow import of eel.

The Kattegat cod is another example, where the stock size is so low, that it is considered one of the most threatened fish stocks in Europe⁹. But the list is long. The North Sea cod continues to be overfished despite years of discussions on how to turn the trend, spurdog is severely depleted and many stocks of herring are experiencing bad recruitment for years in a row.

A significant amount of seafood is also caught using destructive fishing practices like beam and bottom trawling. Research looking at impacts from bottom trawling in the North Sea suggests that bottom trawling could have permanently changed bottom living communities. Bottom trawling reduces habitat complexity and decreases populations with low reproductive rates while increasing populations with high reproductive rates. This contributes to altering the dynamics of the North Sea food web. In the Barents Sea some 350 trawlers have a license to operate and traces of heavy trawling can be found around the Bjørnøya fishing grounds and as deep as 830m¹⁰ along the continental shelf.

Atlantic bluefin tuna is another example of a mismanaged fishery where short term economic gains and not long term sustainability have guided management. The stock is now so depleted that a number of United Nation

experts have agreed that the available scientific evidence supports listing of bluefin tuna under the *Convention on International Trade in Endangered Species* CITES Appendix I, which calls for a ban on trade of the species¹¹. An independent expert review of The *International Commission for the Conservation of Atlantic Tunas* or ICCAT the international body that manages the bluefin tuna fishery – commissioned by the organization itself – considers the eastern Atlantic bluefin tuna fishery an “international disgrace” and a “travesty of fisheries management”. The experts recommend an immediate closure of the fishery by ICCAT – until a management plan is put in place that follows scientific advice, including the closure of all key spawning areas. Still ICCAT member states allow them self’s a quota higher than the scientific recommendation¹².

For fish stocks in the north east Atlantic the situation is a bit better. Both cod and haddock in the Barents Sea are doing better than previously and illegal fishing has been dramatically reduced. In 2005 as many as every fifth fish caught were fished illegally. The situation is still alarming for redfish and costal cod. Redfish is mainly taken as bycatch in the whitefish fishery while there is a direct fishery for coastal cod despite the scientific advice for zero catch. The reduction in unreported landings together with restrictive quotas based on science and favourable climatic conditions has all contributed to the improved stock conditions for Barents Sea cod and haddock. However, there is still cause for concern even if the stock size has improved. The large number of bottom trawlers operating in the area, also have a negative impact on vulnerable seabed habitats. While a few coral areas have been protected separately, no real marine reserves have been established to compensate the negative effects of bottom trawling in this vast area.

Global fisheries in the high seas have a history of being unregulated and badly controlled and the FAO states that: “In the case of straddling stocks and of other high seas fishery resources, nearly two-thirds of the stocks for which the state of exploitation can be determined were classified as overexploited or depleted. These high seas fishery resources constitute only a small fraction of the world fishery resources, but they can be considered key indicators of the state of a major part of the ocean ecosystem”¹³ In 2006 a study by a group of scientists projected that we will run out of fish in 2048¹⁴. The study made headlines all over the world. Since then a newer study conducted by some of the same scientists suggests that management efforts have

The *International Commission for the Conservation of Atlantic Tunas* considers the eastern Atlantic bluefin tuna fishery an “international disgrace” and a “travesty of fisheries management”.

lead to reduction in exploitation rates in some regions.

However a significant fraction of fish stocks will remain collapsed unless the overall fishing pressure is not reduced. They suggest that to achieve a substantial decrease in exploitation rate a number of management measures need to be implemented. This include a combination of tools like quota setting, fishing closures, more selective fishing gear and ocean zoning¹⁵. Continuous demand from retailers plays an important role in securing pressure on fisheries managers to take the right action and secure the sustainability of the fish catching sector.



2.2 By-catch and discards

By-catch is the accidental catch of any species that fishermen did not intend to catch. Some of these species can be sold and are therefore kept. The rest often including unwanted species of fish, seabirds, turtles, corals, sponges and marine mammals are thrown back into the sea as discards. Worldwide, an estimate of 8 % of fish catches is thrown back into the ocean dead or dying. In the years 1994 – 2001 this meant a yearly average of 7, 3 million tons¹⁶. In some European bottom fisheries the percentage of fish being thrown back into the sea as discards is as high as 70-80 % of what is being caught¹⁷. In the North Sea cod fishery discarding contributed to about half of the total fishing mortality in 2008 and 2007. This means that an equal number to what was landed in harbours was thrown overboard at sea¹⁸. Discarding of fish is a wasteful and unacceptable practice and makes it difficult for scientists to estimate stock sizes and contributes to undermine scientific assessments for quota setting.

Fishermen discard fish mostly because they catch fish that they cannot legally land, either because they do not have a quota for it or because the fish are too small to be legally landed or they want to “high-grade” their catch. High-grading means that fishermen replace part of their catch with a more valuable catch; this could be replacing smaller cod with bigger ones that fetch a higher price in the market.

Norway has had a ban on discarding on a number of species since 1992, and has now reinforced the ban to cover all fish species and fish taken by any vessels in Norwegian waters. However, in the EU discarding is still allowed to happen via implicit regulation and inflexible quota and landing arrangements. This encourages significant discarding of edible marine life from Community vessels. An EU ban on discarding is one of Greenpeace demands to the reform of the EU Common Fisheries Policy.

Globally and especially in the world's tuna fisheries by-catch of sharks, mammals, turtles and seabirds is a big problem. By-catch is in its nature difficult to estimate, but attempts have been made and data suggests that, more than 200,000 loggerheads and 50,000 leatherback turtles were accidentally caught in the pelagic longline fishery in 2000¹⁹.

2.3 Destruction of habitats

The ocean is just not just a place to conduct fishing. The ocean contains huge mountains, deep valleys, stone reefs, kelp forests, cold- and warm water corals, some that we are still yet to discover. With the current use of our oceans all this is being destroyed in a rate not known and not controlled. Outside territorial waters, on the high seas, where redfish, tuna, sharks and orange roughy are being targeted, the lack of control and reluctance to follow international agreed guidelines, means that huge trawlers fish the slopes of underwater mountains destroying sponges and life that have taken hundreds of years to form, and depleting fish species that can grow to be over a 100 years old and don't mature before they are around 30 years old.

While the first national parks on land got established about 100 years ago only a tiny fraction of our oceans have been protected. Under the current management paradigm it's allowed to fish almost everywhere and with any gear as long as you have a quota.

In European Union waters, it is still not prohibited to fish inside sensitive habitats designated under the 1992 habitats directive as Natura 2000 site. In reality this means that a trawler can legally trawl through a stone reef or sandbank designated for protection by European member states for its important nature values. This happens in the North Sea, Skagerrak, Kattegat, Baltic Sea and Botnian bay every day. In Norwegian waters the cold water coral reefs formed by the coral *Lophelia Pertusa* used to be widely distributed. Sadly, recent studies and anecdotal information collected by

researchers have estimated that between 30 and 50 % of the *Lophelia* reefs in Norwegian waters have been impacted by bottom trawling²⁰. Norway's cold water coral reefs have been protected against intentional damage through the Norwegian coral act and mapping on sea charts, but as long as not all coral reefs are mapped on sea charts and protected within real marine reserves, it's hard to secure they don't get damaged.

2.4 Illegal fishing

Illegal, unregulated and unreported (IUU) fishing means that fish are being caught in areas where the vessel have no license to fish, that fish are landed outside agreed quotas and that fishing is conducted in an area where no regulation is in place and therefore management, stock size estimates and control with landings are lacking. Illegal fishing is being conducted in many ways around the world. Illegal fishing takes place also in EU and Nordic waters. Illegal fishing undermines attempts to managed fisheries in a sustainable way. Overall figures indicate that IUU fishing amount to approximately 10 billion Euros a year worldwide, making IUU fishing the second largest producer of fishery products in the world²¹.

In the Barents sea illegal fishing for cod have been declining in recent years from 166 000t in 2005 to 15 000t in 2008 thanks to a combined effort from authorities, industry, retailers and environmental organizations. The Barents Sea experience clearly shows that industry, retailers and NGOs can influence and change practices leading to real political change.

In 2008 EU adopted a new legislation aiming at combating IUU and in 2009 control measures was agreed. One of these measures is catch certificates following the fish from the boat to the shelf. On the global level the FAO has recently put forward initiatives to combat IUU by implementing a global port-state agreement. This mean that the flag state of a vessel needs -to confirm the legality of the fish catch to the country where the fish is being landed. The Port-State Agreement is a milestone in international fisheries management but still needs to be ratified by 25 countries before it can enter into force. The first eleven FAO members—Angola, Brazil, Chile, the European Commission, Indonesia, Iceland, Norway, Samoa, Sierra Leone, the United States and Uruguay—signed the treaty immediately following its approval in November 2009. The market sector was a crucial force to help reduce illegal cod fishing in 2006. Now the tools exist to avoid all illegal fish, but they need to be used with same rigour as for Barents Sea cod.

2.5 Aquaculture

In addition to wild fisheries aquaculture has undergone a massive growth over the last 50 years. Aquaculture is often promoted by industry and governments as the solution to unsustainable fisheries. Unfortunately, with the exception of some shellfish aquaculture practices and freshwater fish reared in ponds, most aquaculture exacerbates the pressures placed on overexploited marine ecosystems.

The creation of ponds for marine shrimp e.g. tiger prawns has led to the destruction of thousands of hectares of mangroves and coastal wetlands in countries as Thailand, Bangladesh and Ecuador. Shrimp farming can also lead to limited access to clean drinking water for surrounding communities and many places the creation of farms have led to serious abuses of human rights, with reallocation of people against their will²². Many farms also have problems adhering to workers rights' regulations.

For farmed carnivorous fish, like salmon, trout, halibut, tuna and cod the problem is especially, but not limited to, the use of wild fish such as sand eels and anchovy to be used as feed. An increasing aquaculture production does not mean less pressure on the marine ecosystem, but actually constitutes a net drain on the world's seafood supply. It's estimated that for Norwegian farmed salmon produced in Norway it takes 2,5 kg of wild fish to produce 1 kg of salmon. The Norwegian wild fish numbers are suggested to be the best in the world and for tuna ranching the figures can be as high as 20:1. Thereby, at the moment, the global appetite for farmed fish, is putting unsustainable strain on the world's food resources²³. In addition to the use of wild fish as feed problems with escapes, diseases and outbreaks of sea lice is causing additional pressure on the marine environment and wild salmon stocks.



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3. The solution:

It is a political scandal and an ecological disaster that decision makers have not reacted much sooner to the overwhelming evidence of the decline in fish stocks, and the unacceptable impact that fishing have projected on the entire ecosystem. It is the policymaker's responsibility to secure that the fishery is sustainable. Unfortunately up till now, they have done little to live up to this responsibility. Almost all countries get a failing grade when they are scored against the FAO code of conduct for responsible fishing²⁴.

In the EU, the Common Fisheries Policy (CFP) is being revised, and a new policy will go into force 1st of January 2013. What the revision will bring remains to be seen, but the Green Book from the EU Commission set the road to a better ocean policy, by pinpointing that the 2002 reform had failed in bringing sustainability of fish stocks and profit to fishermen.

One of the major problems identified by the EU commission is the severe overcapacity within the European fleet – leading to too many fishermen catching to few fish. Also high discard rates have been put forward as a reason why many European Union fisheries are unsustainable. Greenpeace sees the upcoming revision of the CFP as intelligence test for EU countries to prove that they can adhere to science and manage fish stocks and the marine environment in a holistic and precautionary way. The revision of the CFP is also a golden opportunity to change the unsustainable practices of the past. But member states have to be bold when setting the target for the reform.

When reforming the CFP it's of great importance to set goals that will ensure that fisheries policy delivers on the goals of the environment directives within the EU – the habitats directive (92/43/EEC), water frame directive (2000/60/EC) and the marine strategy directive (2008/56/EC) as well as international obligations to haul the loss of biodiversity before 2010.

To reach these goals European fisheries ministers have to implement sustainable fishing practices as well as setting aside a network of marine reserves where no fishing is allowed. In these reserves fish populations and bottom living communities will have a chance to recover from years of overexploitation. Creating marine reserves is an essential and necessary tool to halt the loss of marine biodiversity and to rebuild ecosystems and the fish stocks and species that depends upon them.

Greenpeace calls on at least the following changes in the forthcoming reform of the EU's Common Fisheries Policy to make fisheries sustainable in the future

- « **Quotas** must be legally set at or below scientifically recommended levels;
- « **The size of the fleet** and time spent fishing must be reduced in line with the best available information on fishing resources and fish populations, setting binding European and national fleet reduction targets;
- « **Fishing activities must be restricted** or banned in areas of special conservation interest, such as spawning and nursery grounds, feeding areas and other sensitive marine habitats like Natura 2000 areas;
- « **Fishing activities** should only be licensed subject to a prior assessment of their environmental impact;
- « **All fisheries activities**, seafood products and fisheries decision-making must obey strict data transparency and traceability rules.

4: The role of retailers

As mentioned previously, it should not be the role of retailers to secure the sustainability of the fishing practices from where they source their fish. It is the responsibility of the decision makers, EU fisheries ministers and management organizations to secure that only a sustainable amounts of fish are taken from the oceans and that fishing does not compromise the survival of other marine life and the function and coverage of marine habitats.

Unfortunately this has not been the case. Therefore retailers have to demand that the seafood they sell stems from sustainable sources so their customers do not – unknowingly and unwanted – support overfishing, discarding, illegal fishing, by-catch of threatened animals and habitats destruction.

Retailers are the link between the fishing industry and consumers. Therefore retailers have a great opportunity and also a responsibility to influence the industry to employ more sustainable fishing methods and to not sell seafood from depleted stocks. The power to influence industry and governments has been used by many retailers around the world²⁵, and to some extent in the Nordic region (see under individual supermarkets in the supermarket section). However, there is a need for much more work if we are to have fish for future generations. Retailers have a great deal of power through their purchasing arrangements, and they should use this power to influence and drive the changes needed to the way fish is harvested and cultured.

5. Nordic retailers

After Greenpeace and others raised the issue of sustainable seafood most retailers in the Nordic region have now developed seafood sourcing policies. This has resulted in several changes to the seafood being offered to consumers in all three countries. Below is a short overview on how different retailers in the Nordic region have worked with the implementation and challenges with regards to sustainable seafood.

In the annex a more detailed overview of each retailer will be provided. The overview is based on written accounts from retailers to Greenpeace, but also on websites, news articles and limited shelf checks. Several retailers have made major improvements, but there is still a lot of room for improvement and mutual exchange of experience and best practice.

5.1 Denmark

Danish retailers were very reluctant to begin the work of securing a sustainable range of seafood before they were facing an actual ranking by Greenpeace. Two Greenpeace rankings in combination with Greenpeace activities in the stores and the WWF seafood guide²⁶ pushed the Danish Supermarkets into the work with sustainability. Progress was most pronounced just before the publications of the rankings in January 2008 and October 2008, stressing the very reactive approach the retailers have taken to the work. Only two Danish retailers, Lidl and Rema1000, scored just above the satisfactory line of 50 points out of a possible hundred in the two Greenpeace rankings²⁷, all others failed.

Some Danish retailers; Dansk Supermarked, Lidl, Spar, SuperBest and Rema1000 have now published sustainable seafood policies while others; Aldi and COOP, have not. Most, but not all, Danish Supermarkets have removed problematic species like eel, redfish, yellowfin tuna and beam trawled plaice from the range. Retailers like COOP, Rema 1000, Lidl and Dansk Supermarked, have since the last ranking in October 2008 to some extent continued the work with sustainable seafood.

5.2 Norway

The process around Greenpeace' first ranking of Norwegian retailers sparked an increasing awareness of seafood sustainability in the Norwegian retail sector. However, there was still a lot of work to do to get new policy and principles implemented in practice. Most Norwegian retailers did commit to phase out species on the red-list²⁶ and avoid seafood that has been harvested with unsustainable methods. Top ranked retailers ICA and Smartclub had already removed bluefin tuna, eel, shark, swordfish, Baltic cod and skates. They had also reduced the quantity of tropical shrimps sold. Despite increased awareness in the Norwegian retail sector and many positive words in the new policy documents, much is not yet implemented in practice.

In the first ranking retailers Smartclub and ICA scored just above the satisfactory line which is 50 points out of a possible 100. They both immediately responded to the challenge, and both removed unsustainable seafood from their shelf's and set up policies for purchasing seafood.

Coop, Lidl and Norgesgruppen scored above 50 points, but lacked on clear commitments to face out unsustainable seafood. The supermarket with the lowest score was Rema1000 that scored just below 50 points. Since the last ranking Coop has bought Smartclub, and

Lidl has been bought up and included in the Rema1000 network, leaving the Norwegian retail market dominated by four actors controlling 99% of the retail sector.

Norwegians consume around 22kg of seafood every year and most of that seafood is purchased via supermarkets. Farmed salmon and trout are the seafood products with the highest growth and more traditional seafood products like cod and haddock are losing market shares. Norway is the second largest seafood exporting nation in the world and the pressure from outside markets will play an important role in safeguarding sustainability of the seafood industry. Additional pressure from domestic retailers will add to that pressure.

Overall Norwegian retailers can improve on their communication on sustainable seafood, their labeling practices and commit stronger to phase out seafood caught using destructive fishing practices.

5.3 Sweden

The first seafood-policy ranking of the Swedish supermarkets, published in March 2008, showed that all retail chains sold threatened fish species and/or fish that were caught with highly destructive fishing methods. All retail chains still had a lot of work to do, before they could present a sustainable seafood sourcing policy.

But the initial Greenpeace ranking, and the seafood guide published by WWF²⁸, triggered an intense activity in the entire business to meet the challenge and improve their weak policies. In fact the changes quickly became so immense that the Greenpeace project team felt they had to update the ranking after just a couple of months.

The updated ranking, published in late May 2008, showed that almost all retailers had decided to stop selling fish from threatened fish stocks and other seafood caught or farmed unsustainably.

The first ranking had ICA in top with 66 points of the total score of a 100 point, with Lidl in a close second place with 61 points. Netto was last with just 6 points.

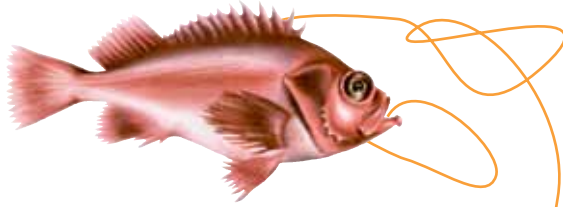
The second ranking had three retailers sharing the top spot, Ica, Axfood and Bergendahlsgruppen all got 81 points, with Bergendahlsgruppen climbing an impressive 39 points. Netto made the greatest climb of all improving 48 points to 54 in total, but they still ended up last in the ranking due to the weak first result.

The average score in the first ranking was 48 points, two months later the average result was 71 points.

In Sweden, all companies are now actively working

with sustainable policies. Bergendahlsgruppen and Axfood have the most developed sustainable seafood policies closely followed by ICA. Their policies have led to delisting of all 14 products on Greenpeace Nordic redlist²⁹. All retailers except COOP Sweden have decided to delist all red products, and COOP is expected to follow in the near future. The first ranking version in March led, after some Greenpeace actions in stores, to substantial and very speedy improvements in all chains. Some retailers claim that they received a record amount of customer requests never before received in any other issue, demanding sustainable seafood policies.

Proper labeling of seafood in Swedish chains has improved significantly, and retailers now demand full traceability, and now schemes with maps of fishing areas and ports of landing are being elaborated. Also fishing methods and in some cases even vessels and catching days are included in the labels on the products.



6. Best practises/Good examples

There have been concrete measures, where retailers have shown innovation in working with sustainability, some have been simple, e.g. removing a problematic species; while in other cases there has been made long term commitments to support best practises. To support best practises is the key area where retailers really can make a difference. Retailers have the power to inform consumers about the product, why it's better and why they have chosen to support the most sustainable fisheries, and thereby helping drive real change forward.

This has been done for instance by Rema1000 in Denmark. Rema1000 have made a conscious decision to not source plaice from beam trawl or bottom trawl fisheries, but only from net and Danish seine. This is an initiative that seeks to change the way the fishery is being conducted on sea, and an example of how retailers do hold the power to demand products that can facilitate a move towards a fishery that is more sustainable.

Most Norwegian retailers have made great progress and have developed good seafood sourcing policies. The steps taken by ICA and Norgesgruppen to commit to stop selling certain species like eel and bluefin tuna are important actions that are of importance outside of Norway. ICA has actively communicated its commitments to sustainable seafood through web, in store information and member magazines. All retailers have also showed great commitment to avoid sourcing illegal fish. The experience with illegal fish in the Barents Sea is a great example of collaboration between different stakeholders all working in the same direction. In terms of best practices its especially worth mentioning Norgesgruppens work on catch methods and commitments to change to more environmentally sustainable catch methods like pot caught Norwegian nephrops instead of trawled.

During the autumn of 2008 ICA Sverige AB decided to stop sourcing farmed Salmon from Chile. The reason was severe problems in the intense Chilean farming industry. The Norwegian farms had to fulfill better environmental regulations, but aquaculture is always challenging from an environmental point of view. Therefore ICA is working together with their Norwegian suppliers to achieve more sustainable feed and to support farms with less escapes and healthier animals.

Best practices among retailers in the Nordic region include

- « publically available seafood sourcing policies
- « better labelling
- « reduction of sales of problematic species
- « removal of unsustainable seafood
- « gear requirements
- « larger shares of certified seafood
- « information on sustainable seafood to customers through web and magazines
- « removal of advertisement of problematic seafood
- « stronger regulations on purchasing
- « fewer suppliers to increase control, and clear dialogue with these
- « field visits to secure follow up on the ground
- « ongoing seafood assessments and contact with external or inhouse expertise

At the end of November 2009 Swedish TV4 broadcasted a very critical documentary that scrutinized the Swedish authorities failed recovery plan for the critically endangered eel. Before the film was broadcasted Bergendahlgruppen City Gross sent out a press release with the headline: "City Gross does not sell eel or scampi this Christmas either", explaining the scientific background to why they do not sell these products even though demand is peaking during Christmas.' This is a good example on how retailers in their communication can contribute to the debate and drive change forward.

We need more pro active communication like this because it explains why the retailer does not offer traditional seafood of this kind and reminds the customer not to buy the product elsewhere, adds pressure on others to keep endangered species off their shelves and sends a clear signal that there is a need for political action to address the overall problem; endangered species should not be caught and sold

Coop in Sweden has presented a goal to offer only sustainable seafood. As part of this, they have developed a sustainability policy with operative strategies and guidelines that are updated twice a year. This has led to removal of eel and beam trawled species, in addition to several other changes. Coop has engaged

in proactive communication with both own retailers and costumers as well as processors and suppliers about the seafood issue. The public announcement and several times delayed presentation of Coops sustainability policy later this spring will show if this is only about words or also real action. We expect this to cover all of Coop Nordic, not only the Swedish branch.

Also ICA has an overarching policy on sustainability and has developed specific guidelines covering seafood. Already in 2008 they stopped 2008 ICA also stopped selling bluefin tuna, swordfish, Baltic cod, skate and rays, porbeagle and eel, and committed to stop marketing of and evaluate lobster caught in Norway, costal cod, redfish, Atlantic halibut, plaice and monkfish. In addition ICA has limited the suppliers of tropical shrimps down to one main supplier, and they have stopped sourcing of Chilean salmon, and engaged in tough discussions with other farmed salmon providers.

7. Future challenges

A majority of retailers have made a first attempt to make a sustainable fish procurement policy, but in a majority of cases this policy is too vague, not specific enough, or not even applied to the whole range of seafood. In particular, many retailers have not exercised sufficient pressure on the producers of branded seafood. The net result is that no Nordic retailer can guarantee a full range of sustainable seafood. All retailers need to develop their sustainable fish procurement policies further and to apply them to the whole range of seafood both aquaculture, wild caught and certified products, and update these policies on a regular basis.

On specific species many retailers still need to work to secure a more sustainable range of tuna products and support best aquaculture practises e.g. tropical shrimp and salmon.

Labelling is one of the big challenges for most Nordic retailers, where the majority is still only labelling seafood with FAO catch area, and scientific name. Retailers need to enhance the information on all seafood products to include as a minimum the common and scientific name of the species; the specific stock the fish was caught from or the farm it was cultivated at and the fishing method used to catch it.

Working with seafood is a very complex matter, and for many Nordic retailers a professional fish buyer and sustainability advisor could be a necessary step to deal with these problems in a more proactive and forward looking way in the future. We have high expectations

for the announced launch of Coop latest seafood procurement policy this spring, which will show whether Coops long heralded sustainability plan is also about concrete action or just words, and expect this to cover Coop in all countries, not only in Sweden.

In addition to securing their own selection through requirements and dialog with the industry, it is also necessary that retailers make their preferences for sustainable seafood and good fishing practices heard also at the political level.

Retailers should begin to engage in the political process, and make the decision makers know, that they support and promote sustainable fishing and that they demand that politicians secure a sustainable use of the oceans in the future. As examples retailers could call for a European discard ban or work for and publically support the creation of network of fully protected marine reserves.

8. Conclusions

Nordic retailers have shown a very reactive approach to the work with sustainability. The work to secure a more sustainable range of seafood with sustainability was only initiated after rankings and seafood guides had been published by Greenpeace and WWF, and the work has been slow, and in many cases not very ambitious. In most cases the work has been done by increasing the range of MSC certified products and removing a few species from the shelves.

There have been champions on the Nordic retailer scene, and those retailers have shown that it is possible to secure a much more sustainable range of seafood products to the customers. There have also in a few cases been good initiatives to improve the sustainability (see section 8.1 – Best Practises)

Working with seafood is a very complex matter, and the greater the range, the greater the challenge.

We hope this report, the challenges Greenpeace has posed to the retail sector on seafood sustainability, and the corresponding need to take sellers responsibility also for seafood, can serve as inspiration to continue the improvement with new tools and systems, and to learn from others experience. We hope to continue to see the retail sector as a continued and committed partner in the ongoing work for sustainable seafood, not only on a species by species basis as reaction to negative press as it has been in the past.

Annex: Overview over status and development on sustainable seafood for the Scandinavian retailers

Denmark

Aldi

Measures taken by October 2008 (the last Danish ranking)

Aldi did not publish any sustainable fish procurement policy, but stated to Greenpeace that they worked with suppliers to secure a more sustainable range of seafood products. Of concrete measures Aldi removed eel from their range, and the yellowfin tuna steaks they sold originated from a fishery where a specialized hook was used to minimize bycatch. Aldi had also begun to take in certain MSC certified products.

Measures taken since the last ranking up to February 2010

Since the last ranking Aldi have not communicated to Greenpeace any new measures taken or new seafood products in their range. Aldi have not yet published any sustainable fish procurement policy.

Future challenges

Aldi still needs to define what they see as sustainable. Since Aldi have made no public statements on environmental or ethical demands, it is not transparent what criteria Aldi sets for the seafood they sell. Aldi also needs to improve their labelling e.g. to include catch area, catching method etc.

COOP Denmark

COOP Denmark consists of Brugsen, Irma, Fakta and Kvickly. COOP was ranked in the bottom of the Greenpeace ranking in October 2008, the reason being that COOP had no public seafood procurement policy, sold threatened species, had no information to consumers on sustainability issues on seafood, and that COOP had no labeling policy.

Measures taken by October 2008 (the last Danish ranking)

COOP had a few MSC certified products, and had phased out Eastern Baltic cod from their COOP fish fingers. COOP was also in the process of phasing out yellowfin tuna. COOP had also committed to not selling bluefin tuna.

Measures and statements since the last ranking up to February 2010

COOP Denmark have started to work much more with the sustainability of seafood compared to before the first Greenpeace ranking. COOP have stated to Greenpeace that they have a regularly adjustment of the range of seafood products, which e.g. could be as a result of a product and/or supplier not fulfilling COOPs environmental and/or ethical demands. For instance; if it is evident that a fish stock is threatened, and there is an alternative to this species, and a reason to believe that the consumer will demand another product, then this product will be phased out.

COOP Denmark is in the process of developing a fish policy in cooperation with COOP Norden. This will result in a "red list" of species and a "positive list" of species. According to COOP Denmark the new policy will include an evaluation of all seafood, based on ICES and information from NGOs. For the species on the "red list" an action plan will be developed on how to deal with the species on this list; if they should be removed from the range entirely or if it's possible to still sell them following some adjustments. In the policy there will most probably be a build in model for revision of the policy, with e.g. a procedure for rapid response on the content if necessary. Until this is published, COOP Denmark follows the MSC strategy, where Coop have an ambition to offer the widest selection of MSC labeled products on the Danish retail market.

Future challenges for COOP

In Greenpeace view COOP Denmark still needs to define what they see as sustainable. Since COOP have made no public statements on which fisheries or aquaculture meet COOPs environmental and ethical demands, it is not transparent what triggers a removal from the shelf or a change of supplier. This will hopefully change when the common Nordic "red list" and "positive list" is being published. The fact that a change will only happen if there is an alternative and if there is a consumer demand for another product does not in any way guarantee that consumers do not source seafood originating from unsustainable sources in COOP. An example on this is

eel, where COOP continues to sell the species even though it is highly threatened. Tuna is another case where Greenpeace still sees no measures on how COOP intends to work with the problems of overfishing and bycatch. A third issue is tropical shrimp, where there is no measures in place to support best practices and not source from aquaculture that is highly unsustainable. It's important that all seafood products is measured towards the COOP sustainability demands, ones these are finally developed, also MSC certified/other certified products.

Greenpeace has high expectations for the announced launch of Coop latest seafood procurement policy this spring, which will show whether Coops long heralded sustainability plan is also about concrete action or just words, and expect this to cover Coop in all countries.

Also in labeling e.g. to include catch area, catching method etc, and in better information to the customers on sustainability issues, COOP need to improve.

Dansk Supermarked

In the Dansk Supermarked cooperation Netto, Føtex and Bilka sells fish. Dansk supermarked have previously not wished to communicate with Greenpeace, therefore the below is based on information from media, and Dansk Supermarked homepage www.dsg.dk. The final text below has been signed off by Dansk Supermarket as correct.

Measures taken by October 2008 (the last Danish ranking)

Already after the first Greenpeace ranking in January 2008 Dansk Supermarked improved, and made a fish procurement policy available on their homepage, but were still ranked very low in the Greenpeace ranking from October 2008, due to many unsolved issues e.g. non sufficient labelling. The fish procurement policy states that Dansk Supermarked has a goal of selling only documented sustainable wild caught fish in 2012. There is information for the customers in the stores about MSC and sustainable fishing. Dansk Supermarked have removed Eastern Baltic cod from the shelf in the summer of 2008

Measures and statements since the last ranking up to February 2010

In a press release from the 30-11-2009 the goal of only selling documented sustainable wild caught fish in 2012 is expanded to also include farmed fish. In December 2008 Dansk Supermarked also committed

to stop selling the extremely threatened eel .

Dansk Supermarked has since 2007 had cooperation with WWF, to secure a more sustainable range of fish. This cooperation was terminated by the end of the year 2009, but Dansk Supermarked intends to keep up the work to secure sustainable seafood. Dansk Supermarked has in general kept working with the issue since the last ranking, and has also communicated their policy and further step to their customers.

Future challenges for Dansk Supermarked

In Greenpeace view Dansk Supermarked still needs to define what they see as sustainable: Since they have made no public statements on which fisheries meet the sustainability demands and goals they set, this could be very broad. It's important that all seafood products is measured towards the sustainability demands, also MSC certified/other certified products.

One example where Dansk Supermarket sustainability demands is not evident is on tuna, were Greenpeace still sees no progress or public statements on how Dansk Supermarked has or is intending to work with the problems of overfishing and bycatch. Another example is tropical shrimp, where it seems like there are no measures in place to support best practises and not source from aquaculture that is highly unsustainable.

Another challenge is labelling where Dansk Supermarked needs to work for a better labelling of all seafood products, e.g. catch area, catching method etc.

Lidl

Measures taken by October 2008 (the last Danish ranking)

In both November and October 2008 Lidl was top of the Greenpeace ranking in Denmark. Even though Lidl was the best ranked retailer, Lidl did not make it into Green, as no supermarkets in Denmark had a policy securing the customers only sustainable seafood and adequate information.

Lidl had a sustainable fish procurement policy already when the first ranking was released, but had not by October 2008 put it on Lidls Danish homepage.

Of concrete measures Lidl had removed shark, (2005), Eastern Baltic cod (2006), redfish and swordfish (2007), canned roe no longer contained cod, but plaice, saith and hoki (2007). Lidl were also in the process of phasing out tropical shrimps.

Measures and statements since the last ranking up to February 2010

Since the last ranking, Lidl have published a whole section about responsible fishing on the Danish homepage. In the published policy Lidl states that they do not source from stocks that are threatened with extinction or is defined as critical by the authorities. Besides the above mentioned measures Lidl have now phased out yellowfin tuna, and taken in MSC certified albacore tuna in their range, and have in cooperation with one of their suppliers started to sell fresh net caught plaice.

Lidl no longer have tropical shrimps as part of their daily range, but market them 1-3 times a year. According to Lidl they follow FAOs code of Conduct and a set of strict guidelines. What these guidelines are is not known to Greenpeace, and they cannot be found on the Lidl webpage. Lidl have also changed supplier for some product since the former supplier did not live up to Lidls demands.

Lidl have stated to Greenpeace that they plan to immediately label their fish products to also include e.g. catch method and to include references to the fish pages on Lidls Danish website.

Future challenges for Lidl

In Greenpeace view Lidl still needs to define more clearly what they see as sustainable. Mentioning only that Lidl do not source fish from stocks that are threatened with extinction or is defined as critical by the authorities, is not enough to secure a sustainable range of seafood products. It's important that Lidl develops the sustainability criteria further to include e.g. impacts on habitat and bycatch issues and use the criteria on all seafood products, also MSC certified/other certified products to secure the most sustainable range possible.

One example is tuna, were Greenpeace still sees no progress or public statements on how Lidl has or is intending to work with the problems of bycatch.

Rema 1000

Measures taken by October 2008 (the last Danish ranking)

Rema1000 was number two on the Greenpeace ranking both in January 2008 and October 2008, due to concrete measures and good information to the customers. In October 2008 Rema1000 published a sustainable fish procurement policy on the web. Here

they explain what they consider to be a sustainable fishery and have examples on how this has influenced Rema1000 range of fish. In the policy Rema1000 states that they demand that the fish they sell is caught with gear that does not harm the environment, meaning that the gear does not destroy ocean environment and is designed to catch the target species to minimize bycatch and discard. On aquaculture Rema1000 demands that the farms are controlled, so production does not lead to pollution and destruction of nature.

Of concrete measure this has lead to that Rema1000 no longer source fish caught with beam trawl, that eastern Baltic cod has been phase out of from the fish fingers, and that eel is no longer sold.

Measures and statements since the last ranking up to February 2010

Rema1000 does no longer source plaice from beam trawl or bottom trawled fisheries, but only from net and Danish seine. From 1st of January 2010 herring fillets have been MSC certified, and Rema1000 have since the last ranking enhanced the selection of MSC certified products. Rema1000 have also stated that more and more products are labeled with catch method.

Future challenges for Rema1000

Rema1000 have worked continuously and determined with their range of seafood, to improve the sustainability. Also after the last ranking in October, there has been real progress. But there is still work to be done. To secure a full range of sustainable seafood, Rema1000 needs to secure that all fish sold lives up to their sustainability demands, also MSC labelled/other certified seafood. One example is tuna, were Greenpeace still sees no progress or public statements on how Rema1000 has or is intending to work with the problems of overfishing and bycatch. Another challenge is labeling where Rema1000 needs to work towards a labelling of all seafood products, e.g. catch area, catching method etc.

SPAR

Measures taken by October 2008 (the last Danish ranking)

By October 2008 SPAR Denmark had published a fish policy on their homepage. This policy stated that SPAR had measures in place to secure a more sustainable range of seafood and minimize bycatch. The policy caused that eel were no longer marketed as well as there was a wider selection of MSC certified products.

Measures and statements since the last ranking up to February 2010

SPAR has stopped working with one supplier since this supplier could not live up to the demands in SPARS fish procurement policy. The demands on sustainability are communicated to suppliers once a year when the agreements are renegotiated. The fish procurement policy has not been updated since October 2008, but SPAR confirmed to Greenpeace that an update will happen on a regular basis.

Future challenges for Spar

Spar needs to secure that all seafood products that is marketed lives up to the sustainability demands. This needs to be done also for the MSC certified/ other certified products products. This would for instance need to be implemented for tuna products, where a large amount of bycatch can occur in certain fisheries. SPAR also needs to work with suppliers on a better labelling of products, so e.g. catch area and catching method is shown on the packaging. SPAR also needs to communicate better to their customers that they have a sustainable fish procurement policy, why they have this, and what the consequences for the selection of seafood that is marketed are.

SuperBest

Measures taken by October 2008 (the last Danish ranking)

Superbest failed the last Greenpeace ranking in October 2008; threatened species were still sold, and SuperBest had no labeling policy or information about sustainability to the customers. Despite that SuperBest had improved since the first ranking. They had developed a public sustainable seafood procurement policy and published it on their homepage, had a wider selection of MSC certified products and had stopped the marketing of eel, anglerfish and redfish in ads. Besides that SuperBest guaranteed that the plaice in their own brand was not caught with beam trawls.

Measures and statements since the last ranking up to February 2010

By February 2010 SuperBest had further developed their sustainable fish procurement policy, and now have a goal of selling only sustainable seafood in 2012. According to SuperBest only one species from WWF redlist, tropical shrimps, is marketed but alternatives to this species

are being explored. SuperBest states that they have terminated the contract with one supplier to optimize the sustainable range of seafood, and have started cooperating more with another supplier who are capable of delivering a bigger range of MSC certified products. Suppliers to SuperBest are bound to the sustainable fish procurement policy, and bound to present SuperBest to alternatives to unsustainable products.

Future challenges for SuperBest

SuperBest needs to define more clearly, what they see as sustainable. The policy is still not strict enough on e.g. which fishing methods SuperBests considers sustainabel, on labelling SuperBest needs to be more ambitious. Instead of only requesting from suppliers to add more details to the products, SuperBest should demand this, and have a roadmap with a clear timeline on when they aim at having full labelling on all there seafood products. Tuna is another case where Greenpeace still sees no measures on how SuperBest intends to work with the problems of overfishing and bycatch.

It is important that all seafood products is measured towards the sustainability demands, also MSC certified products and the seafood in the fresh fish counters, so all seafood is covered by the policy.

Norway

Coop Norway

Coop Norway scored just under a green grade in the 2008 ranking. Coop did not have a comprehensive fish procurement policy but had implemented guidelines of their fish procurement and to avoid purchasing IUU fish. Coop had also stopped sourcing cod from the Baltic. As Norgesgruppen, Coop scored relative low on marketing and information on sustainable seafood.

Measures by October 2008

Coop had implemented guidelines for buying seafood already in 2006. These covered requirements on documentation and continuous follow-up of suppliers. Coop had also added requirements of purchase of cod to avoid IUU fish. Coop had also initiated a tracking system for seafood following the fish from the boat to the shelf.

Measures after October 2008

Coop Norway has continued to develop its seafood work and have together with Coop in the Nordic region developed a comprehensive fish procurement policy.

The policy will be ready sometime during spring this year and will provide a comprehensive framework for fish procurement. Coop has also removed frozen and fresh tuna and has launched several lines of line-caught MSC and Debio labeled cod and are actively seeking to improve its range of MSC certified products. Coop has also initiated a project on feed use in scampi production in Thailand together with The Norwegian Veritas and Norges Vel. Coop has also on several occasions contacted Greenpeace for advice on sourcing and questions to ask.

Future challenges

Coop needs to communicate better with its customers and Greenpeace have great hopes that the new policy will create a platform for communication. A search for seafood on the Coop website gave no hits. It's also virtually impossible to find any information of seafood clicking through the Coop website. Coop does however have a labeling guide with information on the MSC. Coop also mentions the problem with finding suppliers that can supply MSC certified seafood. Coop could also be clearer on its stand on destructive fishing practices and through the Nordic network add pressure on EU fisheries managers and industry

ICA

ICA scored in the green section in the 2008 ranking and has made several commitments to sourcing sustainable seafood. ICA had stopped the marketing of tropical shrimps in 2007 and removed several problematic species during that year. ICA also partnered with WWF in 2007 to improve seafood sustainability. ICA also made commitment to delist a number of species public through a press release and in store advertisements and information.

Measures by October 2008

Measures taken by ICA in 2007 was a minimum landing size for Baltic cod, documentation of legality of catch, and dolphin safe tuna products. They also have a requirement that fish sold should be labeled with species, scientific name, method of production (wild or farmed) and catch area or country for farmed fish. In 2008 ICA also stopped selling bluefin tuna, swordfish, Baltic cod, skate and rays, porbeagle and eel. They also committed to stop marketing of and evaluate lobster caught in Norway, costal cod, redfish, Atlantic halibut, plaice and monkfish. In addition ICA has limited the suppliers of tropical shrimps down to one main supplier. ICA also worked

on strengthening the range of certified seafood.

Measures after October 2008

ICA has an overarching policy on sustainability and has developed specific guidelines covering seafood. The section of fish and seafood is communicated internally to sales and purchasing staff and forms the basis for all procurement of seafood. ICA communicates its policy through web, member magazines and in stores signs and has been communicating its work on seafood actively. See http://www.ica.no/FrontServlet?s=om_ica&state=wwf&showMenu=om_ica_3_1 and http://www.ica.no/file_archive/pdf/Kvalitets_o_miljopolicy06.pdf

ICA has also stopped sourcing yellowfin tuna and has in total removed 10 species from the shelves after guidance from WWF. ICA also participated and presented their seafood work on a seafood conference in Bergen and have meet with both government and industry representatives

One of the challenges mentioned by ICA is the limited customer demand for sustainable seafood. ICA also mentions that there is a difference in Swedish and Norwegian buyers in terms of environmental consciousness.

Future challenges

ICA needs to be better on traceability. ICA could also be better in its communication to customers and also explain clearer why they have made a commitment to source sustainable seafood. ICA could also take a tougher stand on fishing methods. Through its Nordic partnership ICA can also play a political role using the experience in Sweden to add political pressure on the fisheries management of the EU.

Norgesgruppen

Norgesgruppen consist of Kiwi, Spar, Meny, Ultra, Joker and own label Unil. Norgesgruppen scored in the orange sector in the 2008 ranking and was close to a green grade. Norgesgruppen did not have a sustainable seafood procurement policy but had initiated work to secure they did not source IUU cod from the Barents Sea and more general policies to secure sustainability, quality and increased control/traceability of seafood. In the 2008 ranking Norgesgruppen scored high on traceability, definitions/principles and labelling. Norgesgruppen had the low score on information to customers and marketing.

Measures by October 2008

Concrete actions taken were to reduce the number of fish suppliers and have one main supplier for fresh fish and reduce the number of suppliers of tropical shrimps. Actions also included better labelling, traceability and date of catch/slaughter by implementing a system to tracing fish products through the value chain. Norgesgruppen already had a system implemented a yearly evaluation of suppliers. Norgesgruppen changed supplier of cod when the one they used wanted to move processing to China. Cod processed for Norgesgruppen is sourced and produced in Norway.

Measures taken after October 2008

After October 2008 Norgesgruppen has developed a sustainable seafood policy. Norgesgruppen has together with Friends of the Earth Norway and other relevant bodies developed their seafood policy and the policy contains both principles and also actions to be taken on a number of species. UNIL, their own brand also follows the WWF Norway seafood guide. The policy is actively used to evaluate both existing and new products. Norgesgruppen also sets standards to catch methods, aiming at limiting negative impacts on the marine environment. Norgesgruppen have stopped selling eel, bluefin tuna, sharks, skates and rays and toothfish among other species.

Future challenges

Norgesgruppen need to improve its communication to customers regarding sustainable seafood policies. The policy should be available through web and preferable also in stores and email newsletters to customers. Norgesgruppen can also use their purchasing power to improve labelling on seafood products both for own brands and on other brands.

Rema1000

Rema1000 had the lowest score in the 2008 ranking and has had billboard advertisements for both tropical shrimps and halibut in 2008. Rema1000 performed around average on all subsections in the ranking and scored zero on information to customers.

Measures by October 2008

Rema1000 have a policy for purchasing of fish but it's not publically available. Seafood is labeled common and scientific name and FAO area of catch. They also demand fish to be traced back to the harbor of landing but not back to the ship.

Measures after October 2008

Rema1000 have not made any substantial changes to its seafood sourcing policies but have deliberately chosen to source certain kind of seafood for example tuna. Rema1000 continuously evaluate its range of seafood and suppliers but have so far not shifted any of their suppliers.

Future challenges

Rema1000 need to be much clearer about their seafood sourcing and information to customers. They also need to ensure they don't advertise for unsustainable seafood to its customers. Rema1000 should make their seafood sourcing policy available on their website. Something Rema1000 have done in Denmark. In Denmark Rema1000 has also committed to increase the range of MSC certified seafood. There is no reason why Rema1000 in Norway should have less information available to its customers.

Sweden

Coop

Coop markets fish products through their grocery retail chains Coop Forum, Coop Extra, Coop Konsum, Coop Nära and the on-line grocery store Mataffären. se . Coop accounts for 21.4 % of the entire Swedish grocery retail sector. Coop is owned by the KF Group.

Coop Trading A/S is a joint Nordic purchasing company that handles a lot of purchases for COOP and it's partners in Sweden, Denmark, Norway and Finland.

COOP has three brands in Sweden, Änglamark, COOP and X-tra.

March 2008 – Greenpeace first ranking

Coop is known to market a lot of sustainable products. But when it came to fish Greenpeace discovered several problematic species, such as redfish (Uer), swordfish, cod (from threatened stocks) and tuna. They failed to answer the Greenpeace questionnaire even though the company had received questions about sustainable seafood policy as early as august 2007. Coop also received the questionnaire a very long time before the deadline.

May 2008 – Greenpeace second ranking

COOP was the only retailer that did not improve in the second ranking. They did a statement that COOP would only source fish from sustainable sources,

but failed to present any concrete action plans, recommendations, new policy or products that were lifted from their shelves in an effort to improve.

Measures taken since the second ranking

COOP has presented a series of very impressive measures to secure their ambition to only market sustainably harvested seafood products.

To guide their purchasers and suppliers COOP in Sweden has developed a list that contains the species of seafood (including details on the specific stocks) that they are allowed to buy. The criteria is that only fish caught with the least destructive gear, healthy stocks and within volumes recommended by ICES are allowed. The introduction of this list has led to the removal of species like eel and plaice caught with beam trawl.

The list also meant that a number of suppliers were exchanged for alternative ones that could provide better traceability and ensure that their fish come from stocks that according to ICES are harvested sustainably.

COOPs sustainability policy today includes strategies and guidelines to secure sustainable sourcing of seafood. The fish list is updated twice a year when COOPs panel of fisheries experts meet. The group of experts also decide on updates of the overall fish product range based on reports from external experts during these meetings.

COOP has initially (March 6, 2009) decided to communicate their seafood-strategies to their suppliers and urge them to join this process of change. Later last year COOP informed their retailers about the new strategies and explained why the company is now changing what seafood products they are marketing. During 2009 COOP decided not to sell any fish caught with a beam trawl.

The new seafood sourcing policy has on several occasions been communicated in COOPs magazine Mersmak (circulation 900 000) and – partly - on COOPs websites and in direct marketing. Änglamarkspriset 2009 had sustainable fisheries as a theme. The prize was given to two small scale fishermen that has worked intensively to minimize the impact of their shrimp trawling operations inside the Kosterhavet marine national park.

During the spring 2010 COOP plans to invite media to a press conference and present their plans, the strategy and how they work to reach the goal to only offer sustainable seafood.

COOPs strategy is evaluated by Reciliens Center/Albaeco.

Future challenges

COOP clearly has very high ambitions and are investing a lot to secure sustainable seafood to their customers. But Greenpeace still lacks a clear and official definition of sustainability from Coop. We have high expectations for the announced launch of Coop latest seafood procurement policy this spring, which will show whether Coops long heralded sustainability plan is also about concrete action or just words, and expect this to cover Coop in all countries, not only in Sweden.

ICA Sverige

ICA Sverige has a total of 1 369 stores in Sweden. The stores are owned and operated independently by ICA-traders, but they have contracts with ICA that regulates joint purchases, logistics and marketing. The stores are divided in four sub-brands ICA Nära, ICA Supermarket, ICA Kvantum and Maxi ICA Stormarknad.

Measures by October 2008

ICA Sverige already had a sustainable seafood procurement policy and topped the initial Greenpeace ranking but lacked measures in labeling policy, marketing/promotion, practical implementation and principles of sustainable fish procurement. During 2008 ICA improved their practical implementation and their principles of sustainable fish procurement during the year. They also increased pressure on their suppliers to deliver sustainably sourced seafood and better traceability.

During the autumn 2008 ICA also decided to stop selling salmon farmed in Chile. The reason was severe problems in the intense Chilean farming industry. The Norwegian farms had to fulfill better environmental regulations, but aquaculture is always challenging from an environmental point of view. Therefore ICA is working together with their Norwegian suppliers to achieve more sustainable feed, farms with less escapes and healthier animals.

Measures after October 2008

ICA has removed Yellowfin tuna and moved the volumes to Skipjack and Albacore, as a result of decreasing Yellowfin stocks. ICA is not selling Bluefin Tuna at all. During the spring 2009 ICA decided to stop selling tropical shrimp, since no suppliers has been able to document sustainable production methods. ICA is following and engaging in a new standard for tropical shrimp farming within the Aquaculture Dialogue, led by WWF.

If ICA is going to sell tropical shrimp again it has to live up to this coming standard.

ICA has also offered suppliers that sell directly to their stores education on sustainable fishing, to thoroughly brief them on ICA's demands regarding the information that has to be provided with the goods they deliver. End of 2009 ICA showed the film *The End of the line* to all their purchasers of seafood plus other relevant employees. Parts of the movie has previously been shown to ICA Business Ethics & Policy Committee.

Via Akerseafoods homepage it is now possible for the customer to track where cod, haddock and saithe used in ICA-branded products are caught and landed.

European Plaice was converted to MSC during 2009 and next year all mackerel will be sourced from MSC fisheries. During 2009 ICA also launched several new MSC and KRAV seafood products, for example caviar and haddock.

To avoid large quantities of linge ICA started to purchase lutefisk/Stockfish made from cod and saithe during 2009. Before the Christmas season in 2010 all lutefisk will be made from cod or any other replacement for linge.

ICA is actively communicating its seafood policy and the need for sustainable fisheries in all channels, including the web, their magazine *Buffé* and distribution of WWF's fishguide in their stores.

Future challenges

In December 2009 Greenpeace found endangered eel for sale in several ICA stores in Skåne. ICA will have to think again on how to influence the independent shop owners to follow the fish policy applied centrally.

ICA could also take a tougher stand on fishing methods. Through its Nordic partnership ICA can also play a political role using the experience in Sweden to add political pressure on the fisheries management of the EU.

Bergendahlsgruppen AB

Bergendahlsgruppen AB owns the retail chains City Gross and EKO and also delivers to approximately 200 independent shopkeepers. Of the independent retail stores around 80 is organized under the Matöppet brand and 60 cooperates on purchases and food control under the name *Matrebellerna*.

Bergendahlsgruppen is a part of the family business Bergendahl & Son AB, that also owns several other retail businesses.

Measures before October 2008

Bergendahlsgruppen did not get enough points to get approved on any of the criteria in the first Greenpeace ranking, but improved enormously in the second ranking where they split the first place with Axfood.

Bergendahlsgruppen promptly decided to create a redlist of their own, which in practice meant they stopped selling almost all seafood redlisted by Greenpeace and/or WWF. All beam trawled and seafood with large by catch of threatened species was taken out.

They also stopped selling tropical shrimp, eel and also started a co-operation with a tuna supplier that made it possible to track the canned fish with very high accuracy. Information was also given to the customers in the stores about the status, red/green/yellow light on different seafood products, and some basic information about the species.

Fish is only sourced from suppliers that can guarantee their seafood has full traceability and does not come from IUU. Since Bergendahlsgruppen buy European plaice from Denmark they make sure it is caught according to WWF's Denmark's special guide lines.

City Gross communicates their fish guide and why they refuse to sell eel and tropical shrimp on information boards in their stores.

Measures after October 2008

Bergendahlsgruppen has stopped a few products when their suppliers have not been able to verify that they were caught from sustainable stocks. Information on why customers should avoid certain seafood is available on their website including reminders in the recipes and elsewhere where different kind of seafood is mentioned.

City Gross still abstain from selling tropical shrimp and eel since no supplier can guarantee that they are sourced sustainably.

Their seafood purchase policy is today an integrated part of the contracts Bergendahlsgruppen signs with all their seafood suppliers. The policy is continuously updated with/through new appendixes.

Future challenges

Bergendahlsgruppen has no means of formally controlling the seafood policies of the independent shop owners they do business with. For example Greenpeace found eel in a Matöppet store in Klågerup, Skåne. The shop owner referred to the fact that he did not know enough about the problem.

However it would be good to provide these businesses with some form of education/information, specially branded information boards, fish guides etc. and encourage them to apply the same policies as Bergendahlsgruppen as a whole. Bergendahlsgruppen should make their seafood policy very clear to these retailers and use it as an argument to make them buy more from them.

Relevant employees should, if they haven't already, also get information on the situation in our seas to strengthen the commitment to live up to the policy and raise awareness of the problems. This could be done through viewings of documentaries or films on the subject such as the End of the line.

Lidl Sverige KB

Lidl is one of the ten largest retail chains in Germany and the largest low price chain in Europe. Lidl is rapidly establishing more and more new stores in Sweden.

Measures by October 2008

Lidl was ranked second best in the first Greenpeace ranking, but they failed to improve as much as the other retail chains for the second ranking in 2008. Lidl just improved 11 points from the first to the second ranking.

After the second ranking Lidl had no clear definition of sustainability and still failed to deliver on labeling policy and marketing/promotion.

Lidl introduced its first MSC-certified product in 2003 and is continuously expanding the range of products. Today Lidl markets its MSC-products in 17 countries.

Measures taken after October 2008

Lidl has decided not to sell European plaice (*Pleuronectes platessa*) due to the destructive fishing methods used to catch this species.

Lidl has a sustainable seafood procurement policy that is updated "continuously" but it is still not published on their homepage. But they do have a map of the FAO fishing areas to describe where the fish is caught and basic information on the seafood species in their products.

Future challenges

Greenpeace still lacks a clear definition of "sustainability" from Lidl Sverige, and we would like to see the policy published on the Swedish homepage .

Lidl should follow the example of the majority of their Swedish competitors and stop selling tropical shrimp since there is no supplier that can document that their tropical shrimp is sustainably sourced today. If Lidl has found a supplier that can ensure that their tropical shrimp is sustainable they should publicize this documentation on their homepage.

It's important that Lidl develops the sustainability criteria further to include e.g. impacts on habitat and bycatch issues and use the criteria on all seafood products, also MSC certified/other certified products, to secure the most sustainable range possible.

One example is tuna, were Greenpeace still sees no progress or public statements on how Lidl has or is intending to work with the problems of by catch.

Netto Sverige AB

Netto Sverige AB is part of Dansk Supermarked gruppen A/S, which in turn is owned by A.P. Møller-Maersk Gruppen and Salling A/S. The first Swedish Netto store was opened in 2002 and today Netto has more than 100 stores in Sweden. The ambition is to establish 30 new Netto stores in Sweden every year in the coming years.

Netto ended at the bottom of the first Swedish ranking with just a few points, way behind second last Bergendahl group with 42 points. No Sustainable seafood procurement policy, no principles of sustainable seafood procurement, no labeling policy and no marketing/promotion what so ever to educate the consumers contributed heavily to Nettos catastrophic result.

Measures by October 2008

Netto made the biggest improvement of all supermarket chains from the first to second Swedish ranking, even though it was from an extremely low level.

On May 20 2008 Netto Sverige announced that they would stop selling all threatened species based on WWF:s Swedish fish guide. At the time of the press release 37,5 percent of the fish sold was MSC-certified and Netto also promised that all fish sold should be MSC-certified within five years (May 2013). Both cod and European Plaice was delisted.

Despite the improvements Netto still ended last in the ranking mainly because of a weak labeling policy and a complete lack of marketing/promotion measures to educate their customers in the need for more sustainably sourced seafood.

Measures taken after October 2008

Netto continues the shift towards MSC-certified products, and recently added FISKGRÄTÄNG, Alaska Pollock, Hoki filé and CHUMLAXFILÉ. During the summer 2009 Netto started to sell cod again.

Nettos suppliers are encouraged to seek advice from WWF to improve the sustainability of their products. The seafood policy is today a part of Nettos overall strategy, which is revised two times annually and sometimes in between in response to upcoming events. In connection to the revisions the seafood suppliers are asked if their products meet a set of parameters based on information from WWF, Greenpeace and producers.

Netto Sverige AB has received 50 000 information folders on sustainable seafood that has been displayed and offered to their customers in their stores. MSC certified products has specially high lighted in Nettos direct marketing and the fact that Netto stopped selling threatened species (according to WWFs red list) has also been used in marketing. There is also information on sustainable seafood and some links on Netto Sveriges home page.

Future challenges

In Greenpeace view Netto Sverige AB still needs to define what they see as sustainable: Since they have made no public statements on which fisheries meet the sustainability's demands and goals they set, this could be very broad. It's important that all seafood products is measured towards the sustainability demands, also MSC certified/other certified products.

Axfood

Axfood conducts food retail and wholesale trade in Sweden. The Group's retail operations are conducted through the wholly owned Willys, Hemköp and PrisXtra chains, comprising 225 stores in all. In addition, Axfood collaborates with a large number of proprietor-run stores that are tied to Axfood through agreements. These include stores within the Hemköp and Willys chains as well as stores run under the Handlar'n and Tempo profiles. In all, Axfood collaborates with some 650 proprietor-run stores.

Wholesale business is conducted via Dagab and Axfood Närlivs. Axel Johnson AB is the principal owner with approximately 46 percent of the shares. Axfood has a 17.1% market share in Sweden.

Measures by October 2008

Axfood improved massively over the whole range between the first and the second ranking 2008, and ended up sharing first place with Bergendahlsgruppen.

The fish policy they implemented stipulates that fish and shellfish from threatened populations are not to be sold in the stores. Axfood relies on the red list of the Worldwide Fund for Nature (WWF) to identify populations that are under threat.

At the same time, fish and shellfish from sustainable populations are to be promoted and customers are to be informed about how they can shop for fish sustainably.

Fish and shellfish from threatened populations must not be sold in the stores.

Axfood describes their policy like this:

All fish sold must be traceable to a particular population, fishing zone/farm and fishing time

The purchase of fish or shellfish fished using environmentally destructive methods, for example damaging trawling methods, is to be avoided

Fish and shellfish farmed using environmentally destructive methods must not be sold in the stores

Axfood will offer customers a wide range of green-listed fish

Axfood will help customers to replace red-listed fish with good alternatives

<http://axfood.se/Global/Milj%C3%B6%20och%20ansvar/Fiskpolicy.pdf>

Measures taken after October 2009

May last year Axfood started to sell Baltic sea cod again since WWF took fish from that stock off their red list. According to a survey done by WWF Axfood doubled the range of MSC and KRAV-certified seafood products and removed all WWF redlisted species from the shelves between September 2008 and September 2009.

Axfood has also chosen to stop selling Chilean salmon due to concerns over the amount of antibiotics used in the farming and other environmental issues.

Fish policy information materials has been produced for all Axfood retail-chains.

Future challenges

Axfood themselves sees a need to improve the communication about the fish policy to customers in the stores, both to promote sustainably sourced seafood and explain why some species are not sold. A lack of marketing/promotion has been a weak sector in Axfoods policy since the first Greenpeace ranking in 2008, it can still improve.

Axfood now, together with other proactive retail chains, has to communicate their concerns about the ocean environment to our political leaders and urge them to act to protect our oceans ecosystems. This is particularly important in the run up to the 2012 reform of the EU common fisheries policy.

Vi-butikerna

Vi-butikerna is a chain consisting of close to 60 independent retailers sharing the same brand. Axfood is Vi-butikernas main seafood supplier and they discuss the matter continuously.

Measures by October 2008

In the first ranking Vi-butikerna had the second lowest ranking with just 46 points. In the second ranking they improved significantly and got 72 points in total.

Measures taken after October 2008

Vi-butikerna has a common seafood policy where they promise to promote MSC- and KRAV-certified seafood, not advertise WWF-redlisted species centrally including not publish recipes containing those species, to distribute the WWF-fish guide to the customers, only advertise cod caught in the Barents sea exceeding and from fish exceeding a minimum size, keep their member companies updated on seafood developments via their network, and more. Vi-butikerna has no seafood information on their homepage.

Future challenges

Vi-butikerna should apply the policy of their main seafood supplier Axfood when they buy seafood individually as well. This would mean a ban against tropical shrimp and eel, the later is seriously endangered and should not be sold by any responsible retailer.

Endnotes

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- 6 Joe Borg, commissioner of Fisheries and Maritime affairs, blog: Plenty of Fish in the Sea?, http://ec.europa.eu/commission_barroso/borg/speaking/reform_en.htm
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FCRR 2006, Vol. 14(2) edited by Tony J. Pitcher, Daniela Kalikoski and Ganapathiraju Pramod - updated April 2008
- 25 See for instance Waitrose at: <http://www.waitrose.com/food/foodissuesandpolicies/index.aspx>
- 26 WWF Denmark's seafood guide can be found here: <http://www.hvaforenfisk.dk/>
- 27 See the Danish ranking from October 2008 here: <http://www.greenpeace.org/denmark/sea-the-future/greenpeace-har-undersogt-super>
- 28 WWF sea food guide can be found here: <http://www.wwf.se/v/hav-kust/l/1243694-fiskguiden-2009-kampanjsida>
- 29 Greenpeace Nordic redlist is now merged and replaced with Greenpeace international seafood redlist, that can be found at: <http://www.greenpeace.org/international/seafood/red-list-of-species>

In some European bottom fisheries the percentage of fish being thrown back into the sea as discards is as high as **70-80 %** of what is being caught.





It has been estimated that between **30 and 50 %** of the Lophelia reefs in Norwegian waters have been impacted by bottom trawling.

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