

Making Sense of Sustainability



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Making Sense of Sustainability

Who Do We Need To Make Sense To?

How does the BAP Program measure up?



Who Do We Need To Make Sense To?

- Farmers/Processors/Supply Chain
- Feed Producers
- Environmental Communities
- Social Justice Communities
- Financial Institutions
- Foundations
- World Bank
- FAO
- GFSI
- Marketplace
- Others?



The BAP Program

- Standards Development
- Certification Management
- Market Endorsements



Standards Development Process

- **Technical Committee**
 - 4 NGOs
 - 4 Industry
 - 4 Academic/Policy
- **Standards Oversight Committee:**
 - 4 NGOs
 - 4 Industry
 - 4 Academic/Policy
- **Stakeholder Review**
- **Continual Revisions**
- **Committed to Compliance**
 - FAO Guidelines for Aquaculture Certification
 - Global Food Safety Initiative
 - ISO-65 Audits throughout the supply chain



Why BAP - What Areas Should Standards Cover?

- | | |
|--|--|
| <ul style="list-style-type: none">♦ Environmental<ul style="list-style-type: none">♦ Habitat, effluents, salinization♦ Social<ul style="list-style-type: none">♦ Community rights♦ Child labor and worker safety | <ul style="list-style-type: none">♦ Food Safety<ul style="list-style-type: none">♦ Salmonella and other pathogens♦ Antibiotics, pesticides♦ Traceability<ul style="list-style-type: none">♦ From Mill to processed lot |
|--|--|

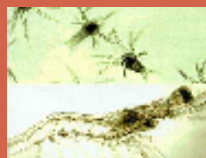


Why BAP: Standards are Multi-dimensional

	Supply Chain			
	Hatchery	Farm	Feed	Processing
Environmental	✓	✓	✓	✓
Social	✓	✓	✓	✓
Food Safety	✓	✓	✓	✓
Traceability	✓	✓	✓	✓



BAP Standards



hatchery



feed mill



farm



**processing
plant**



BAP Standards under development



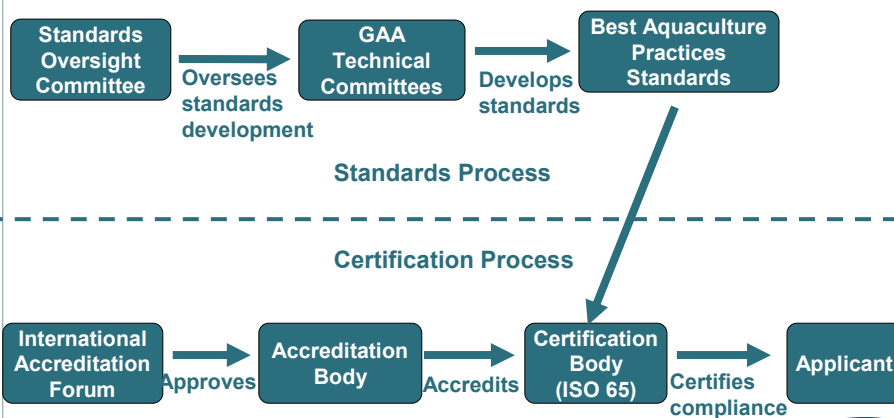
mussels



marine fish



Third party, independent certification



Market Endorsement of BAP Certification

- Scope of Endorsements for BAP Standards Worldwide Within the Retail and Food Service Industries:
- 3 of the 5 top US retailers (32 total retailers)
 - 2 of the top 4 US foods Service distributors
 - 2 of top 3 Canadian retailers
 - 4 of top 6 UK retailers
 - 3 of the top 5 UK importer / suppliers
 - 18 of 20 Greenpeace-listed retailers require, or are in the process of requiring, BAP

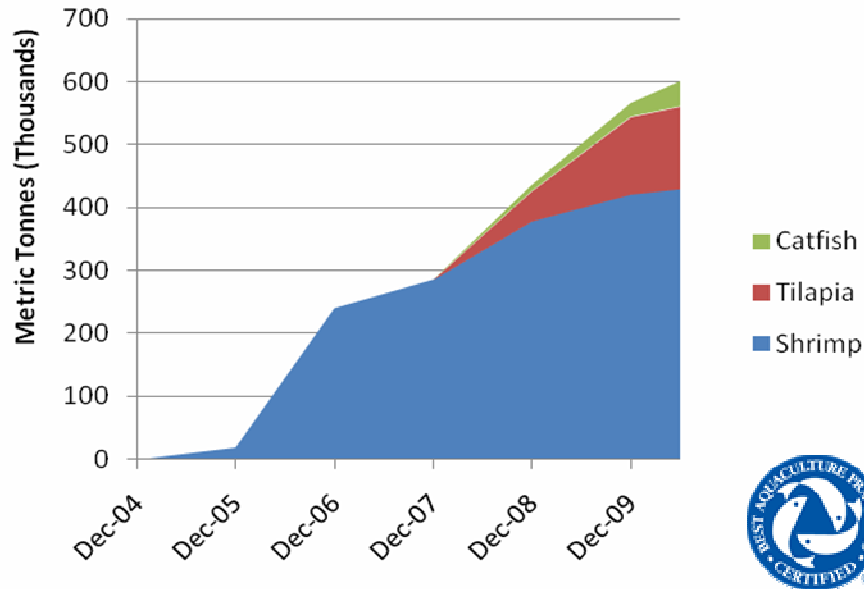


BAP Market Endorsers

AD Delhaize	Food Lion	Maloney Seafood Corp.	Sam's Club
Aldi	Foodvest	Market Basket	Schnucks
Aldi U.K.	Fry's	Mazzetta Company, LLC	Scott's Food & Pharmacy
Asda	Giant Food Supermarkets	McCaffrey's	SeaPak Shrimp Co.
Baker's	Giant Eagle	Meridian Products	Sea Port Products Corp.
Bloom	Gorton's Seafood	Morrison's	Shop 'n Go
Bottom Dollar Food	Great American Seafood	National Fish & Seafood Inc.	ShopRite
Busch Gardens	Imports Co.	North Coast Seafoods	Slade Gorton & Co. Inc.
Byerly's	H & N Foods International	Odyssey Enterprises, Inc.	Smith's
Channel Processing Co. Inc.	Hai Yang International, Inc.	OFI Markesa International	Sobeys
City Markets	Hannafor Bros.	Ore-Cal Corp.	Sodexo
COOP	Harris Teeter	Orion Seafood Int'l, Inc.	Stavis Seafoods, Inc
Cumbrian Seafoods Ltd.	Harveys Supermarkets	Owen's	Stop & Shop
Darden Restaurants	H-E-B	Pacific Supreme Co.	Sweetbay Supermarket
Delhaize	HighLiner Foods USA Inc.	PanaPesca USA Corp.	Tampa Bay Fisheries
Delhaize City	Hilander	Pay Less Super Markets	Target
Dillons	IGA (Canada)	Price Chopper	Thrifty Foods
Disney	IGA Extra (Canada)	PriceRite	Topco Associates, LLC
Eastern Fish Co.	International Marketing Specialists, Inc.	Quality Food Centers	U.S. Foodservice
Empress International, Ltd.	JayC Food Stores	Quirch Foods	Wakefern Food Corp.
Expac Seafood, Inc.	Kroger Co.	Raley's	Walmart
Export Packers Company Ltd.	Lunds	Ralphs	Walmart Canada
Foodland	Lyons Seafoods, Ltd.	Red Market	Wegmans Food Markets, Inc.
		Rubicon Resources	Winn-Dixie Stores, Inc.



Growth of BAP Certified Volume



Why BAP?

- **Why are we different?**
 - Standards have a very broad scope
 - 8 years in existence/evolution, not just paper.
 - Self-sustaining business model
 - Cost effective: average 1/2 of 1 cent per pound (no logo fee)
- **Standards development: 1.4B lbs (18% of global shrimp production)**
 - Shrimp, Tilapia, Pangasius / Swai, Catfish , Salmon complete.
 - Hatchery, Feed Mill, Farm, and Processing plant
 - Mussels to be completed 2011
- **Inclusive in the supply chain:**
 - Small farms – IOM
 - Training



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GOAL 2011 Santiago, Chile

November 6-9, 2011

Grand Hyatt Hotel Santiago



Averting Seafood Shortage

- Global consumers want more seafood, but...
 - *How will existing seafood facilities generate more product?*
 - *Will new culture areas be developed?*
 - *How will technology assist expansion?*
 - *How will this major growth be financed?*
 - *And how can this all be done responsibly?*



究竟中国还是非洲会成为可持续水产养殖的典型？

A Model of Sustainability?

中国 China

非洲 Africa

