

NATIONAL
RESTAURANT
ASSOCIATION

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ON

SOURCING
SUSTAINABLE

SEAFOOD

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FOODS

What is SUSTAINABLE SEAFOOD?

There's been a lot of buzz about **“seafood sustainability.”** In fact, use of the word “sustainable” has increased more than 300 percent on seafood menus in the last 10 years, according to US Foods. So, what does seafood sustainability actually mean?

The seafood supply chain is incredibly complex, often spanning multiple countries for harvesting, processing, transport and consumption. It includes ships harvesting tuna in international waters (the high seas), small boats pulling crabs in remote coastal communities, and land-based aquaculture farms growing salmon.

To help maximize your environmental stewardship and add more sustainable seafood to your menus — which your customers are increasingly expecting — you'll need to be proactive with your supplier. Good suppliers will partner with you and be an excellent, honest source of information.

For your part, you should know a bit about what makes seafood more sustainable and some of the right questions to ask your supplier. Sustainable seafood sourcing is a journey, not a destination, which you and your supplier take together. Along the way you'll find delicious new additions for your menu that have a compelling sustainability profile you can share with your customers. This guide is designed to get you started.



FOR SIMPLICITY, THE NATIONAL RESTAURANT ASSOCIATION USES THE FOLLOWING DEFINITION FOR SUSTAINABLE SEAFOOD:

Sustainable seafood is a renewable ocean and fresh-water resource of properly managed fish and shellfish. These are harvested or farmed in a way that the catch can be continued year after year without jeopardizing or compromising the future of the fish or shellfish population or the water and land-based ecosystems around it. Sustainable seafood is also socially responsible.

“The key point is that sustainable practices do not negatively impact the environment, people, or animal welfare,” says Jennie Wandler, senior director, category management for seafood at US Foods, which has a robust sustainable seafood program.



Sustainable & Local Seafood is WHAT'S HOT

Sustainable food sourcing can be an increasingly important way for restaurants to attract diners and build loyalty, especially among millennials who want to know more about where their food comes from and how it's prepared.

In the National Restaurant Association's 2019 What's Hot survey, **more than 60% of the chefs cited locally sourced meats and seafood as a top trend**, putting it in the top 10 menu trends for the year. About four in 10 fast-casual operators also say it's a growing trend, according to the Association's 2019 State of the Restaurant Industry.

Half of consumers now say the availability of environmentally friendly food makes them more likely to choose one restaurant over another,

according to the 2019 State of the Restaurant Industry research. The interest was even stronger among millennials. About six in 10 reported that their choice of restaurants could be swayed by the availability of environmentally friendly menu items.

Note that "local" doesn't necessarily mean sustainable or eco-friendly. The sustainability of any one species of fin fish or shellfish depends how it was harvested or raised over the long term, not how close to your restaurant it was pulled from a river, lake or ocean. While there are certainly benefits to purchasing local seafood — freshness, support for community businesses — until you investigate with your suppliers how the seafood was caught, "sustainability" might not necessarily be one of those benefits.



Where do we get OUR SEAFOOD?

Most seafood consumed in the United States is imported, but many species are also caught or farmed in the United States, providing restaurants the opportunity to **offer fish at different price levels and for different palates.**

Most Commonly Consumed SEAFOOD TYPES

Source: National Fisheries Institute

About
85% of the
seafood
Americans
enjoy is
harvested
or farmed
outside
the United
States.

5
TOP



SHRIMP



WHITE FLAKY FISH
(e.g., tilapia, Alaska Pollock,
cod, halibut)



SALMON



CANNED TUNA



CRAB

Americans eat a narrow variety of types of fish. According to the National Fisheries Institute, **90% of the seafood Americans enjoy is comprised of only 10 different species.** But it's clear Americans have a taste for fish and seafood. And since consumers are already fans, clever restaurateurs and culinary experts have an opportunity to introduce guests to less commonly prepared species, such as cobia, grilled squid, mussels, whelks and more.

AQUACULTURE VS. WILD CAUGHT

Which is more "sustainable"?

Fish are caught in two primary ways:

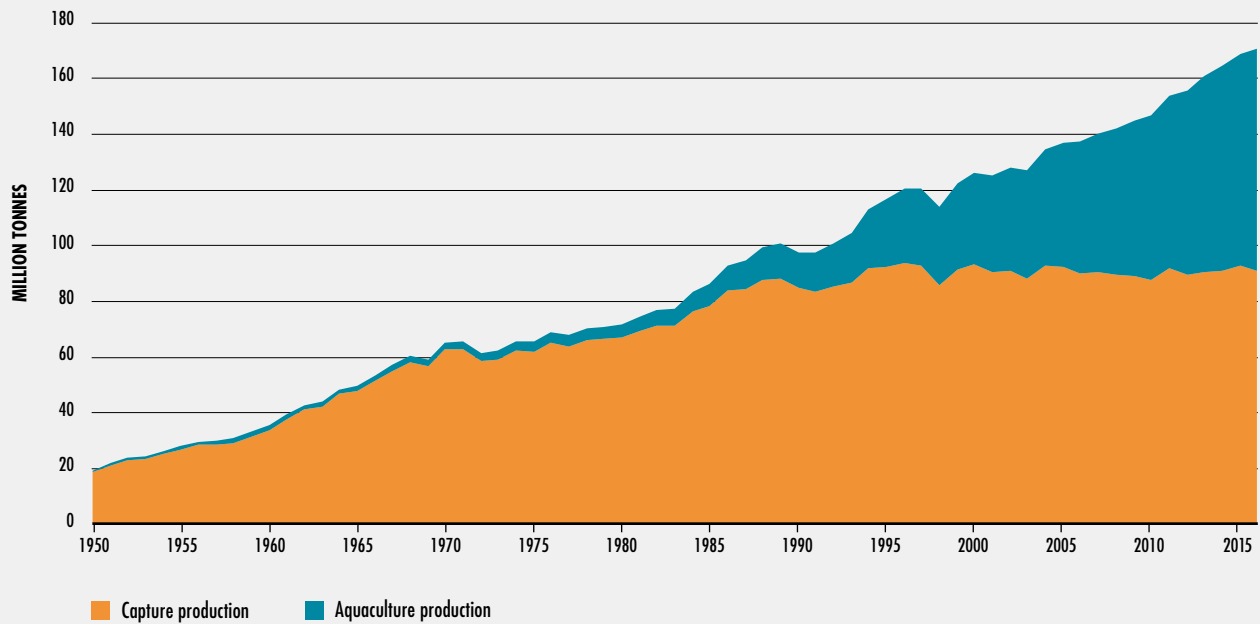
- 1. by fishermen in boats** plying oceans, lakes and rivers to harvest fish with nets, harpoons and fishing lines; and
- 2. by aquaculture farmers** working facilities on land and near the coasts who raise fin fish and shellfish in a controlled setting. Deep-sea farming is another method; harvesters control feed but leave water temperature, currents and other conditions to nature.

It's no longer true that aquaculture is worse for the environment than wild-caught fish. In fact, the opposite can be true. Many well-run aquaculture farms are much more sustainable than their wild-caught alternative; it really depends upon the fish and shellfish species and the suppliers from whom you're sourcing your seafood.

One important factor in the sustainability of aquaculture is called the "feed conversion ratio" (FCR). While FCR varies across fish species, the most efficient salmon aquaculture businesses run around 1.2 FCR, meaning that to grow one pound of salmon, farmers use 1.2 pounds of feed. Some businesses are even more efficient.

For feed, a company might use a plant-based version, forage fish such as herring, sardines and squid, or a blend of the two. However an aquaculture company's feed is created, the feed itself should be as sustainable as possible. The more plant-based the feed, the lower the impact (typically) on the environment. Some modern feeds include only 15 percent actual forage fish, 15 percent omega-3 fatty acids that come from fish oils, and the rest — 70 percent — is vegetable-based. Some new technologies are even leveraging insects and the omega-3 fatty acids in nuts and microalgae, eliminating the need for forage fish while having no measurable impact upon fish-farm yields. The fewer forage fish we pull from the ocean to feed farmed fish, the more fish is left for whales, dolphins and other creatures to consume.

**FIGURE 1
WORLD CAPTURE FISHERIES AND AQUACULTURE PRODUCTION**



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

Source: *The State of World Fisheries and Aquaculture 2018, Food and Agriculture Organization of the United Nations*

Some important factors when talking to your supplier about the sustainability of aquaculture-raised fish include:

- Are your suppliers leveraging **trusted certification programs** such as (but not limited to) Alaska Seafood Marketing Institute’s Responsible Fisheries Management, Best Aquaculture Practices, or GLOBALG.A.P. See Certifications at the end of this document for certification resources.
- Ask about the **feed conversion ratio**, which measures the amount of feed needed to grow a pound of seafood. This varies across fish species, but is a good starting measure for some sustainability efforts.
- Inquire about the aquaculture company’s **fish-feeding strategy**: Is it plant-based, forage-fish-based, or a blend of the two?

- How does the aquaculture company **handle waste streams** and effluent from the fish? Do they leverage seaweed, bivalves or other filtration processes to minimize “downstream” nitrogen loading? Well-run fish farms also have approved effluent plans, to ensure there’s not a buildup of waste in the growing areas.
- **When the fish have diseases** and require treatment, how does the company address it? Do they use antibiotics or other, less impactful methods whenever possible (e.g., early diagnostics, biosecurity management)? Are antibiotics used as growth enhancers (which should be actively discouraged)?

Discussing these topics with your supplier rep (or someone from the seafood team or a sustainability rep expert at your distributor) will help you

better understand where your fish is coming from and how it was raised. Understanding how different certifications and raising practices align with your business values will help you on your way toward more sustainable seafood sourcing.

Reputable suppliers will be eager to share their sustainable practices and will be ready and willing to answer your questions.



What is AFFECTING OUR SEAFOOD?

OVERFISHING

Overfishing refers to the unsustainable hunting and collecting of a fish species that, if left unchecked, could lead to the collapse of a fish population in a given region. Basically, fish are taken out of a lake, river or ocean at a faster rate than they can breed and replace their populations.

Overfishing can occur when too many mature fish are taken from a population and there aren't enough left to reproduce, or too many younger, smaller fish are taken and there are not enough left to mature and reproduce.

Every restaurant should make it a point to actively work with their suppliers to support fisheries that maintain healthy fish and seafood populations and ecosystems. Your seafood supplier should know the latest statistics about how many fish, shellfish and bivalves (and which types of seafood) can be safely harvested that year without threatening future populations.

Today, the health of our aquatic ecosystems and their fish stocks are under pressure from a growing human population, pollution and other issues. Most of the fisheries we rely upon to serve our restaurant guests, especially fisheries in the United States, are in relatively good shape. Some fisheries, though, are stressed due to the popularity of the species they catch.

As with any complex system, there are several **challenging issues that arise when discussing sustainable seafood.**

BYCATCH

“Bycatch” is a marine animal that is caught by a fishery even though it's not the species targeted. Bycatch can include everything from seabirds, marine mammals and sea turtles to sharks. Bycatch also might include underage or undersized target fish or marine animals. Animals caught as bycatch may be attracted to the bait or gear used by a fishery or they may become entangled or trapped by fishing gear in their environment.

Most bycatch is thrown overboard dead or dying. About 27 million tons of marine life discarded as bycatch globally every year, according to the Food and Agriculture Organization of the United Nations (1994). Bycatch can be a big problem: Some estimates state that more than one-third of all the fish and seafood captured is bycatch, and in some poorly managed fisheries, the amount of bycatch can be several times greater than the amount of harvested fish intended for capture.

Some types of fishing gear and methods are more selective and help reduce bycatch. If it's not the intended catch, the animal can be returned quickly to the water while it's still alive.

Certain harvesting methods and gear capture target fish and seafood more selectively than others. Ask your fishmonger how your seafood was collected before you purchase it. Your supplier should be able to discuss what methods were used and explain how they minimize bycatch.



Work with your supplier to tap into INNOVATIVE SEAFOOD SUSTAINABILITY EFFORTS

Though most seafood is caught or farmed in a sustainable manner (according to the United Nations' Food and Agriculture Organizations' report on The State of World Fisheries and Aquaculture 2018), there are opportunities for chefs and restaurant groups to work with their suppliers to put even more sustainable seafood on the menu. Suppliers who are transparent and knowledgeable about their sustainable sourcing policies will be eager to share their information with operators.

“When people ask about our policy or standards, that gets me really excited,” says Wandler, from US Foods. “Our policy leverages our partnerships with best-in-class industry organizations who are at the forefront of seafood sustainability standards.”

Questions to ask YOUR SEAFOOD SUPPLIER

Your purveyor is the single most important partner you're going to have in shifting your business toward sustainable seafood sourcing.

The main data to collect is the source fishery/farm location, catch methods and sustainability certifications. Talk to them about what you want to achieve and ask them some good questions.



- **What's a good way to check in about new opportunities in sustainability? Do you have videos or marketing materials I can review?**
- **If I hear about a sustainable seafood product, how can I work with you to bring it into my kitchen?**
- **What are your sustainability goals and how can I help (i.e., can I serve less common, but sustainably harvested species that have excellent flavor profiles?)**
- **What fish and shellfish are available in each season? What species are available that are local, responsibly harvested and available at a good price?**

Every supplier should be able to answer where the seafood came from and how it was caught. In the best cases, suppliers will have stories about the producers, and you can use this information to help improve the storytelling on your menus and through your servers to share with your customers.

US Foods® offers a wide range of seafood products in their Exclusive Brands and collect source data including, but not limited to, the fishery and catch method or farm associated with the product. They use third-party data providers that are in tune with assessing the fisheries and the progress of the fishery improvements in the supply chain, as documented in their Responsibly Sourced Seafood Policy (released in 2018). To be included in the company's Serve Good® program, a product requires two attributes. First, it must come with a claim of responsible sourcing or contribution to waste reduction. Second, it must arrive to customers in packaging that meets the company program's specifications.



CAN YOUR VENDOR OFFER SMALLER ORDER QUANTITIES THAT LET YOU TRY OUT LIMITED-TIME-OFFER DISHES?

All menu changes have to work for your concept's menu and your business.

Create LTO tastings of potential products side by side with items you're considering replacing. You might find an alternative with a similar flavor profile, and maybe even a better price.

Play up the sustainability aspect in the menu description.



BAND WITH OTHER LOCAL RESTAURANTS TO MAKE A VOLUME PURCHASE

of a new, sustainable species to try it out and keep costs in line.



DON'T FORGET TO LEVERAGE YOUR CHEF AND RESTAURATEUR NETWORK

and ask what has worked well in their restaurants.

GET INFORMED

ASK ABOUT FISHERY IMPROVEMENT PROJECTS (FIPs)

FIPs leverage the combined experience of businesses, conservation organizations, scientists and governments to improve the environmental performance of fishery environments (think specific bays, rivers, lakes, ocean areas) and find a market to sell their products.

There are approximately 80 FIPs and Aquaculture Improvement Projects (AIPs) around the world, which are responsible for roughly 10 percent of the world's seafood production. To be sure, not all FIPs are created equal, but work with your supplier to explore purchasing fish from a FIP and understand that these purchases should be part of a comprehensive, active engagement strategy to source sustainable and approved seafood.

Find FIPs at fisheryprogress.org/directory.

INQUIRE ABOUT COMMUNITY-SUPPORTED FISHERY PROGRAMS

Like community-supported gardens and agriculture co-ops, community-supported fishery (CSF) programs give participating members shares of fresh seafood each week for a membership fee. CSFs promote a positive relationship between fishermen, consumers and the ocean by providing high-quality, locally caught seafood. Adventurous restaurateurs with flexible menus could participate in CSFs; ask your fishmonger about how to participate in one.

Find CSFs at localcatch.org.

PUT SUSTAINABLE OPTIONS ON THE MENU

- Maintain flexibility in your kitchen and be ready to cook and serve a variety of fish that have similar flavor, texture, appearance, and applications.
- Maintain flexibility on the long-term menu by not being overly specific in descriptions. Serve “white flaky fish” rather than specifying a particular species such as cod or rockfish, and make sure waitstaff can provide details about what they’re serving and its sustainability profile. Offer a “catch of the day”; the broad description leaves higher- volume and multi-unit operations free to take advantage of lesser-known species that are tasty, sustainable and available. Use keywords such as “sustainable” or “responsibly sourced” in your descriptions.
- Use seafood that’s in season. Your supplier should know what’s available throughout the year.
- Don’t avoid fresh-frozen fish that are frozen quickly and immediately after the catch; they retain their excellent flavor and fresh texture once thawed. Today’s frozen seafood suppliers leverage blast-chill technology to quickly freeze the filleted or processed fish at its maximum flavor profile and keeping ice crystals in the fillet very small. This flash-freezing process keeps the ice crystals from damaging the delicate fish tissues and allows for long-term storage. On the sustainability front, having tasty frozen fish means you can use what you need in your restaurant without worrying about spoilage.
- Let your guests know the steps you’re taking. National Restaurant Association research shows that one in two consumers say the availability of environmentally friendly food items on the menu can influence their choice of restaurants. Be sure to use your websites and menus to tell guests what you’re doing.



DID YOU KNOW?

Sustainable Seafood Bites



SEAFOOD DISHES WITH CLEAN LABEL OR SUSTAINABILITY TERMS can be PRICED BETWEEN 15-20% HIGHER compared to conventional seafood dishes

(Datassential 2019, Menu Trends)



83% OF CONSUMERS report being at least somewhat CONCERNED OVER THE ENVIRONMENTAL IMPACT of the foodservice industry

(Technomic 2018, n=1,200)



AWARENESS OF THE BLUE MSC LABEL IS 37% amongst all consumers globally

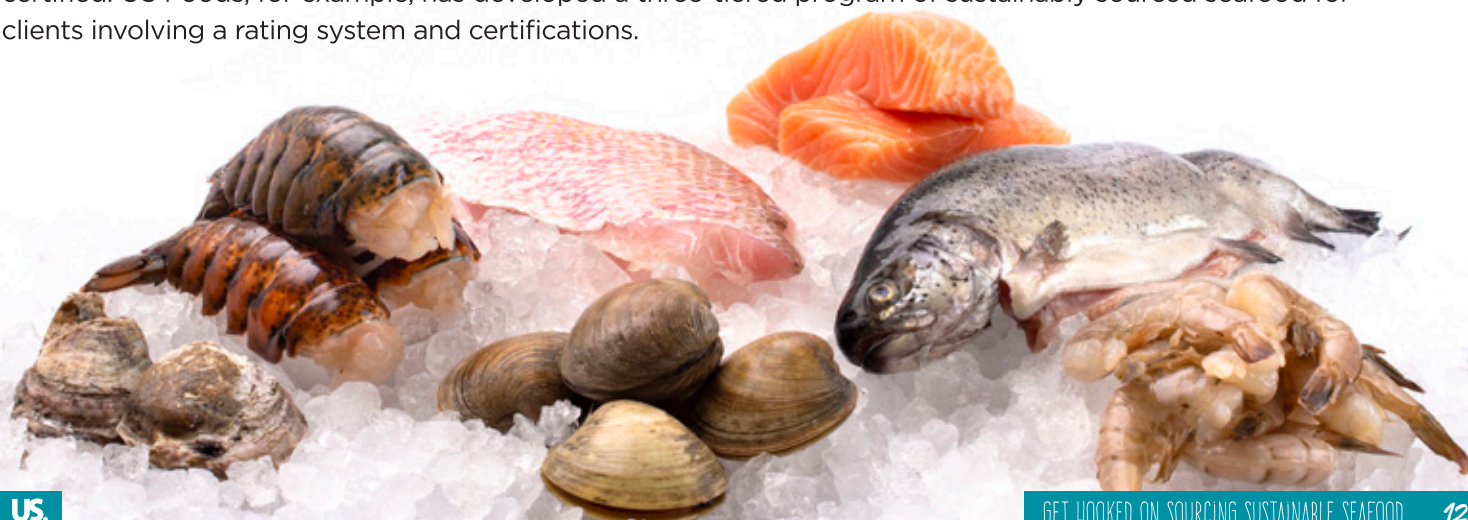
(MSC, Consumer Insights 2016)



SUSTAINABILITY RESOURCES *Who can you trust?*

There are dozens of eco-labels on the market for sustainable seafood. The Global Seafood Sustainability Initiative is an independent, multi-stakeholder effort to help the supply chain, including restaurants, determine which third-party systems are rigorous and credible in the market. Major restaurants and retailers in the United States, Europe and Asia have endorsed the GSSI approach. US Foods® is a funding partner. (ourgssi.org)

Quality suppliers are able to do a lot of the necessary research and can offer fish that has been rated and certified. US Foods, for example, has developed a three-tiered program of sustainably sourced seafood for clients involving a rating system and certifications.

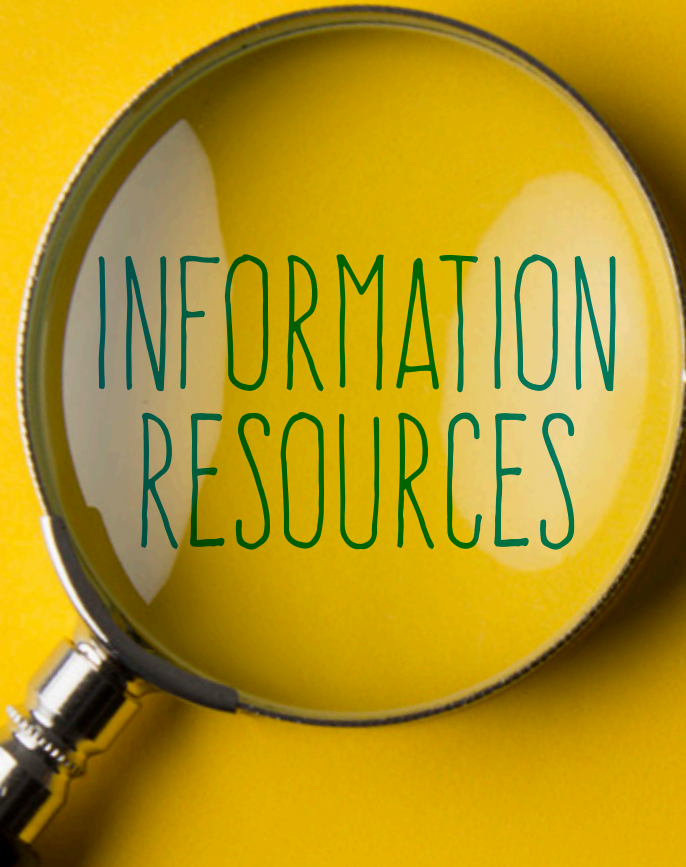


Better Seafood Board

An organization governed independently by the National Fisheries Institute, BSB provides the mechanism for the industry's partners in the supply chain, including restaurants, to report suppliers who commit economic fraud. The BSB also will assist restaurateurs with menu reviews and education. See aboutseafood.com/better-seafood-board.

Seafood Watch

The Monterey Bay Aquarium's Seafood Watch program and the NOAA Fisheries Fish Stock Sustainability Index (fishchoice.com) both assess fish stock and provide a rating for its associated sustainability. The Seafood Watch Program rates fish as green (Best Choice), yellow (Good Alternative), and red (Avoid) while NOAA FSSI awards a score between (0-4) with 4 being the best score. Each program also has a category for gray or unassessed stocks. These are fish stocks that are neither good nor bad choices; they are of unknown status because a scientific organization such as Monterey Bay Aquarium or NOAA has not yet evaluated that fishery. Visit seafoodwatch.org.



INFORMATION RESOURCES

Fish Choice

This nonprofit organization uses the NOAA Fisheries Fish Stock Sustainability Index to offer a free sustainability assessment for restaurants and can provide up-to-date information specifically designed for businesses that don't have a large seafood menu. The online platform allows members to track their favorite suppliers and seafood products. See fishchoice.com.

FishSource

FishSource is an online resource that reports on the status of fisheries, fish stocks and aquaculture. FishSource compiles and summarizes publicly available scientific and technical information and presents it in an easily interpretable form. Learn more at: fishsource.org/about.

Fish Watch

The U.S. government's sustainable seafood page outlines up-to-date information on the status of the nation's fisheries. It is not a buyer's guide, but an educational resource to learn about U.S. marine fisheries. See more at fishwatch.gov.

Smart Catch

A sustainable seafood program created by the James Beard Foundation. Restaurants can earn a Smart Catch emblem after chefs learn about sustainable seafood and serve it at their businesses. Learn more at jamesbeard.org/smart-catch.

CERTIFICATIONS

Alaska Seafood Marketing Institute's Responsible Fisheries Management

RFM is a third-party certification program for wild-capture fisheries, similar to the Marine Stewardship Council (MSC), Best Aquaculture Practices (BAP), and Aquaculture Stewardship Council (ASC) on the aquaculture side. Learn more here: alaskaseafood.org.

Best Aquaculture Practices

Created by the Global Aquaculture Alliance, these certification standards help certify sustainable aquaculture facilities around the world. GAA also works to improve practices and increase output across the entire aquaculture production chain. Learn more at bapcertification.org/about.

Fair Trade USA

Enables sustainable development and community empowerment by cultivating a more equitable global trade model that benefits farmers, workers, fishermen, consumers, industry, and the earth. It achieves its mission by certifying and promoting fair trade products. Learn more at fairtradecertified.org.

GLOBALG.A.P

G.A.P. stands for Good Agricultural Practices — and GLOBALG.A.P. is the worldwide standard that assures safe and sustainable agriculture and aquaculture across the world. G.A.P. sets voluntary standards for the certification of agricultural products. Find it at globalgap.org.

Icelandic Responsible Fisheries Program

Offers a practical, robust and cost-effective certification model for Icelandic fisheries to meet the United Nations' criteria for credible certification. This program also received recognition by Global Seafood Sustainable Initiative (GSSI). Learn more at responsiblefisheries.is.

Marine Stewardship Council

An international non-profit organization addressing the problem of unsustainable fishing, MSC is committed to safeguarding seafood supplies for the future. While the council works with restaurants, it is best known for certifying fisheries and products. Learn more about its restaurant program at msc.org/get-certified/restaurants.

QUICK-START GUIDE to Sustainable Seafood

Ready to get sourcing more sustainable seafood?

First, don't take on everything at once! Pick one or two species to start with and grow from there.

Second, take the following steps:

BENCHMARKING

1. Create a working document to track your purchases. Work with your seafood vendor to gather together your purchase history for at least one year and put the information into a spreadsheet, preferably divided by quarter or menu cycle. Include any details you have about average price per item, volume, country of origin, market form and catch method.

2. Rate the sustainability of your purchases. There are any number of sustainable seafood resources available online that match your business philosophy (e.g., aboutseafood.com, fishwatch.gov, fishchoice.com, Monterey Bay Aquarium seafoodwatch.com, and others listed under Resources and Certifications). Find a tool that allows you to cross-reference sustainability criteria from credible industry leaders. Color-code the purchases in your spreadsheet by rating. This will show where you're starting so you can begin to improve.

3. Evaluate your performance. Calculate the number of products, or your purchase volume, by the color categories you've assigned for sustainability. If you use volume, you can see how improving a given product will affect the overall percentage of sustainable seafood served. Conduct a quarterly benchmark analysis of purchases to show your progress and reveal seasonal patterns.



QUICK-START GUIDE to Sustainable Seafood

SETTING GOALS

4. Set sustainable seafood goals. If your company or corporate officers have a sustainability policy, see how it could apply to seafood procurement. If a policy doesn't exist, or it does but lacks clear goals for seafood, this is an opportunity for team building. Bring together as many departments, team leaders, purchasing agents and chefs as you can. Set the goals together.

5. Establish a reasonable pace of change. Challenge, but don't overwhelm your team and build in some flexibility. Revisit your plan based on feedback from production teams.

6. Draft a concise value statement. Use the criteria you develop to write your statement. Include clear goals presented in a series of progressive steps.

LEVERAGING YOUR NETWORK

7. Talk to other chefs and restaurateurs. Your network of colleagues is a wonderful asset to tap into. Ask them about their experience sourcing sustainable seafood: What obstacles did they face and what best practices did they develop? Your own restaurant community is one of your key resources for success.

CELEBRATING EARLY WINS

8. Focus on easier product solutions while you research alternatives to tougher-to-navigate products such as shrimp and canned tuna. This creates momentum and helps you achieve a few wins at the start, and you should celebrate those wins with your staff.





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