



WWF

REPORT

HK

2016



THE SUSTAINABLE SEAFOOD MOVEMENT IN HONG KONG

PROGRESS, PROSPECTS AND CHALLENGES

ABOUT WWF

WWF is one of the world's most respectable conservation organizations, with a network active in more than 100 countries. Founded in 1961 with headquarters based in Switzerland, WWF's mission is to build a future in which humans live in harmony with nature, by:

- Conserving the world's biological diversity
- Ensuring that the use of renewable natural resources is sustainable
- Promoting the reduction of pollution and wasteful consumption

WWF-Hong Kong has been working since 1981 to deliver solutions for a living planet through Conservation, Footprint and Education programmes.

In support of our global mission, WWF-Hong Kong's vision is to transform Hong Kong into Asia's most sustainable city where nature is conserved, carbon pollution is reduced, and consumption is environmentally responsible.

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1. EXECUTIVE SUMMARY

The sustainable seafood movement began in Hong Kong in 2007 with the launch of the WWF-Hong Kong Seafood Guide, which was produced in response to WWF-Hong Kong's first-ever local assessment of frequently consumed seafood. In the ensuing years, the Seafood Guide has raised considerable public awareness about this issue and has helped consumers make sustainable choices when selecting seafood. Since 2010, the movement has advanced into the commercial sector, with catering businesses starting to provide an Ocean Friendly Menu to help Hong Kong consumers choose sustainable seafood items when dining out; and seafood suppliers establishing

an Ocean Friendly Catalogue featuring sustainable seafood, helping their customers cater to the growing local demand for sustainable seafood.

Through information shared by seafood suppliers and by direct observation of Hong Kong's sustainable seafood market, WWF-Hong Kong has determined that sustainable seafood has gradually gained traction and support from the business sector over the last few years. Sales volumes have increased substantially and more suppliers are providing an increasing number of sustainable seafood options throughout Hong Kong. Major hotel and catering groups are taking the initiative and setting targets to improve the overall sustainability of their seafood supply chains, often by following the Seafood Guide and by consulting WWF's global seafood assessment database.

After years of dedicated effort by WWF-Hong Kong, despite our limited resources, the sustainable seafood movement in Hong Kong has now arrived at a critical point. Moving forward, strong promotional efforts will be required of all stakeholders along the supply chain – catering businesses, seafood suppliers, NGOs and the government. Seafood suppliers and catering sector should source and provide more sustainable seafood products, for example through providing Ocean Friendly Catalogue and Ocean Friendly Menu, to their clients and consumers respectively to make sustainable seafood more accessible in the market. Supplier and catering groups can partner with WWF-Hong Kong to undertake in-depth seafood sustainability assessments, prioritize actions, establish a time-bound action plan and formulate a target to improve sustainability of seafood sourced by the business. Only with these collaborative efforts by stakeholders can sustainable seafood truly take root, making sustainable seafood mainstream products in the market and a business norm in seafood sourcing. Ultimately consumers will benefit - they will not need to refer to WWF Seafood Guide as businesses are only providing sustainable seafood.



© WWF / Emma Okic

MSC certified sustainable seafood, here a package of frozen salmon, sold in MIGROS stores, Switzerland.

2. SCOPE OF THIS REPORT

WWF-Hong Kong believes that now is the right time to provide a “status report” on the sustainable seafood movement in Hong Kong, especially since the Council for Sustainable Development’s Support Group on the Promotion of the Sustainable Use of Biological Resources is actively promoting the sustainable use of biological resources. Sustainable seafood has been quoted as one of the most successful locally-developed examples of sustainable resource use, something which can serve as a reference point for the Support Group as it proceeds on its important mission, and to be built on to create a conducive environment to encourage and drive sustainable trade and consumption in this city.

This document offers precisely what is required: a status report on the current state of the sustainable seafood movement in Hong Kong. As the market has been extremely dynamic, providing a comprehensive review on the sustainable seafood market presents quite a challenge. Different stakeholders and sectors face their own challenges and opportunities which are dependent on their positions along the complicated seafood supply chain; and these stakeholders all have unique stories to tell.

In spite of the complexity involved in putting it together, this report contains a wealth of information and data shared directly by businesses with WWF-Hong Kong, as well as numerous observations made about the sustainable seafood market by WWF-Hong Kong since 2007 through both business and public engagement activities. This report aims to draw attention to key lessons learned, identify areas that can be strengthened, identify existing and upcoming opportunities, and highlight areas where effort should be expended in the future; all in the hopes of transforming the seafood market to make sustainable seafood more accessible in the medium term and make it a common part of the mainstream Hong Kong seafood market in the long term.

This report will focus on reflecting the current status of sustainable seafood within the seafood industry. Although consumer awareness of this issue is linked to movements within the industry, this area is not examined in this report; nor has any associated action or position stated by the government on this issue been included in this report.

The mechanism by which consumer awareness eventually translates into behavioural change can be elusive to track. First-hand usage and trade data from catering businesses and seafood suppliers is a more accurate way to estimate trends and give insights into the latest state of the sustainable seafood movement in Hong Kong.

For clarity’s sake, the word “seafood” in this report is used throughout to refer to aquatic organisms, including those produced in or harvested from both freshwater and marine environments, which are used for human consumption. The word “sustainable seafood” is conventionally perceived in Hong Kong to refer to seafood that comes from either MSC- (Marine Stewardship Council) certified fisheries, ASC- (Aquaculture Stewardship Council) certified fisheries, or those listed in the WWF Seafood Guide’s “Green – Recommended” and “Yellow – Think Twice” categories. The above definitions are used throughout this report unless otherwise specified.

3. BACKGROUND

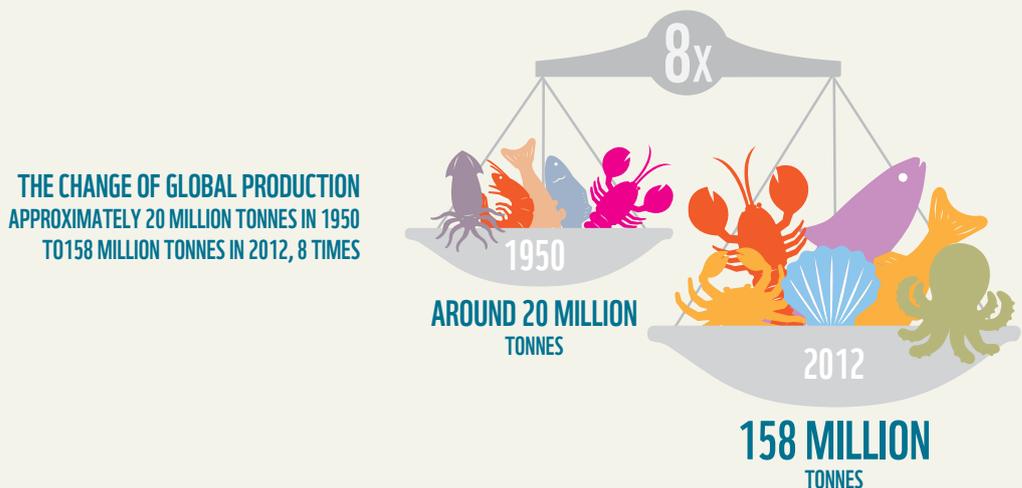


© James Morgan / WWF

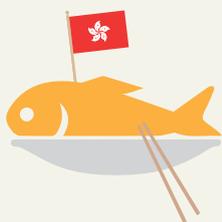
A Bajau fisherman carries his catch to the 'cages' - large underwater nets used by the export companies to store grouper and other live reef fish. Tomian Island, Wakatobi, Indonesia.

3.1 CHALLENGES PRESENTED BY INTERNATIONAL TRADE

In many nations around the world, seafood is an integral part of people’s diet. Indeed, the worldwide demand for seafood continues to rise. According to the Food and Agriculture Organisation of the United Nations (FAO), in 2011 seafood (including captured and cultured marine and freshwater species, but excluding aquatic plants) provided about three billion people with at least 20 per cent of their animal protein intake¹. The world’s growing human population has led to an ever-increasing demand for and supply of seafood: in 1950 the global production of seafood was approximately 20 million tonnes, with the majority coming from wild capture fisheries. By 2012, total global seafood production had grown by nearly eight times to 158 million tonnes, with about 58 per cent coming from wild capture fisheries¹. Of the total global seafood production, about 136 million tonnes was used for human consumption¹.



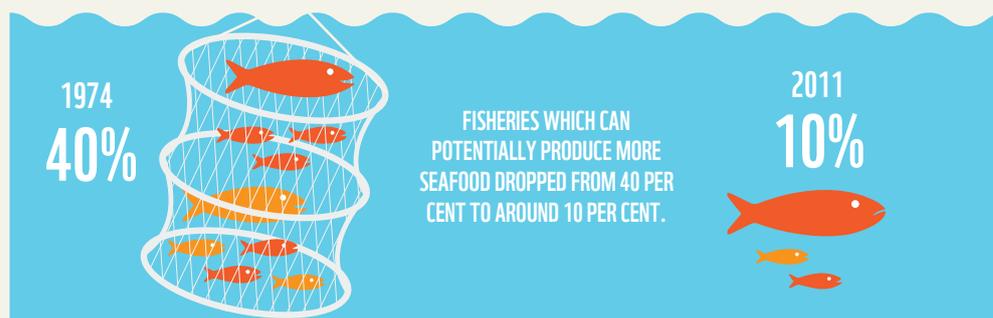
3.2 CHALLENGES IN THE GLOBAL FISHERY



HONG KONG IS NOW THE SECOND LARGEST PER CAPITA CONSUMER OF SEAFOOD IN ASIA, AND THE SEVENTH LARGEST IN THE WORLD

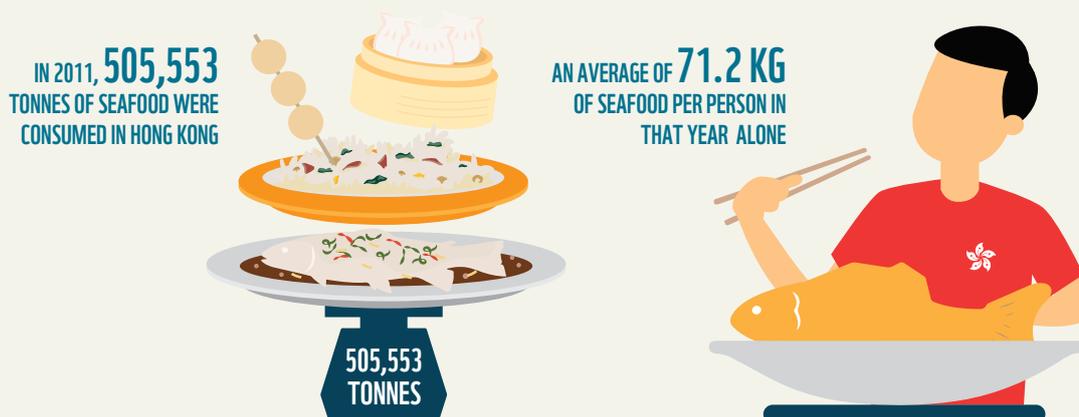
Since the 1950s, the demand for seafood has soared, driving the depletion of fishery stocks around the planet. According to the FAO, the proportion of overexploited fisheries – fisheries that are yielding less than their maximum potential production due to excessive fishing – increased from 10 per cent in 1974 to around 29 per cent in 2011¹. Over the same period of time, the proportion of fish stocks considered underexploited or moderately exploited – i.e. those fisheries which can potentially produce more seafood – dropped from 40 per cent to around 10 per cent¹.

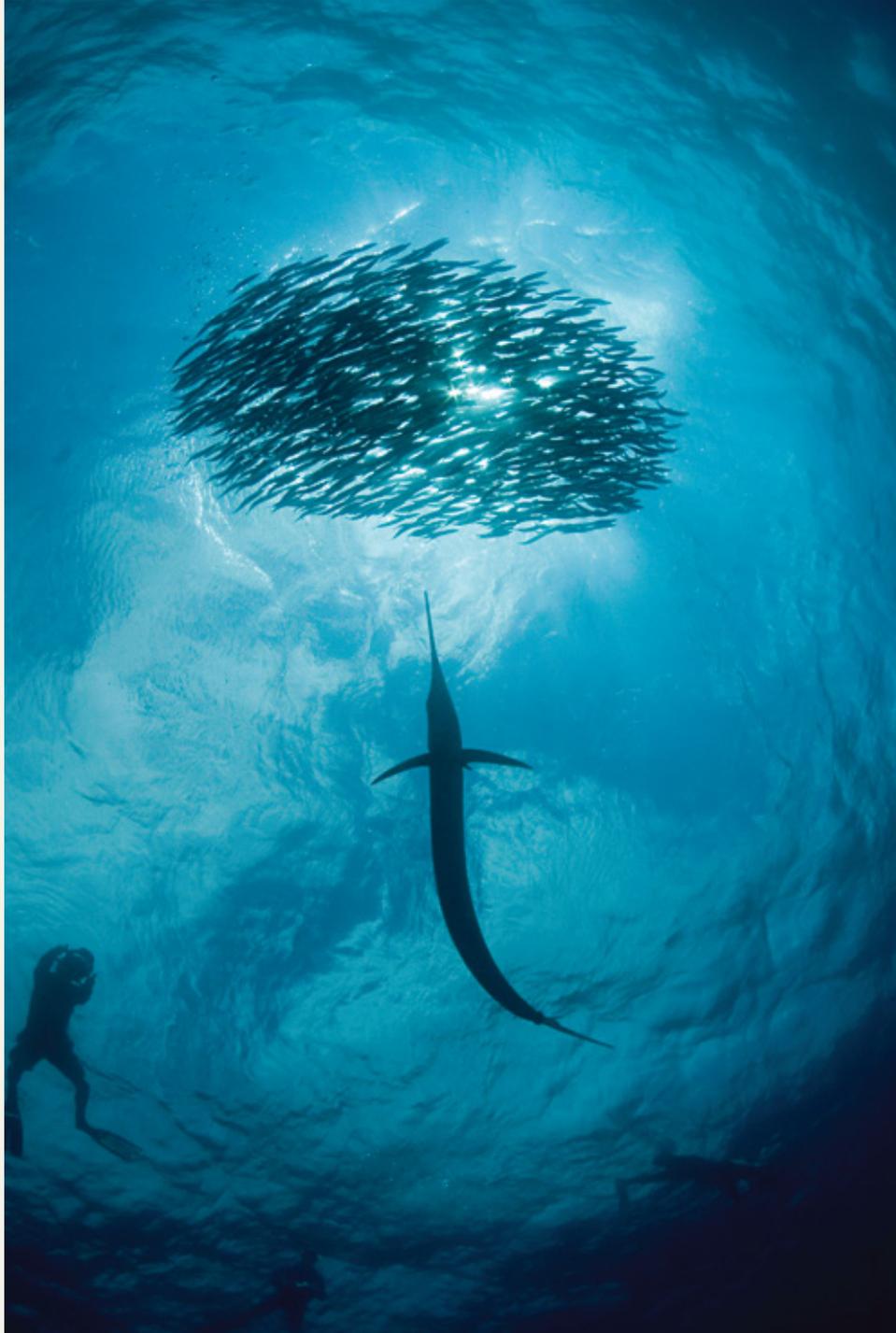
WWF-International's Living Blue Planet report released in September 2015 provided an extremely alarming update regarding the status of the world's oceans. Analysing fluctuations in 5,829 populations of 1,234 marine species between 1970 and 2012, the report revealed a devastating average decline of 49 per cent in the size of these populations². The major drivers of this decline have been the overexploitation of many of these species for human consumption and the impacts associated with their harvest. Another study published in November 2015 detailed the rapid deterioration of the marine ecosystem of the South China Sea. Marine resources in the South China Sea have been fished down to between five and 30 per cent of the size they were in the 1950s³. Some species of reef fish like the humphead wrasse and coral groupers have been decimated in certain areas.



3.3 RELEVANCE TO HONG KONG

Many years ago, Hong Kong was once a small fishing village with a booming fishing industry. But as the size of our population increased, so did our demand for seafood. FAO figures show that in 2011, 505,553 tonnes of seafood were consumed in Hong Kong, an average of 71.2 kg of seafood per person in that year alone⁴ - about 3.8 times higher than the global average (18.9 kg per capita at the time) and double the per capita consumption in mainland China⁴. Hong Kong is now the second largest per capita consumer of seafood in Asia, and the seventh largest in the world⁴. The seafood choices made by people in Hong Kong have a large and enduring influence on the fishery resources of the nearby South China Sea and the global oceans.





© naturepl.com / Doug Perrine / WWF

View from below of silhouette of diver and Atlantic sailfish (*Istiophorus albicans*) attacking bait ball of Spanish sardines / gilt sardine / pilchard / round sardinella (*Sardinella aurita*) off Yucatan Peninsula, Mexico, Caribbean Sea

4. THE DAWN OF HONG KONG'S SUSTAINABLE SEAFOOD MOVEMENT

While Hong Kong has enjoyed and continues to enjoy a seemingly endless supply of seafood from all over the world, only a small proportion of people are aware of the real effects that our gargantuan appetite for seafood is having on the marine environment. To address this information gap, in 2007 WWF-Hong Kong started the Seafood Choice Initiative, aiming to provide the public and the business sector with information on seafood sustainability and to encourage consumers and businesses to consume and source sustainable seafood through resources like the WWF Seafood Guide and eco-labels such as the MSC and ASC⁵. WWF-Hong Kong is the only environmental NGO in Hong Kong that has undertaken a seafood sustainability assessment and engaged the public and corporate sectors in the sustainable seafood movement.

WWF-Hong Kong launched several business engagement programmes in 2010, including the Ocean Friendly Menu (OFM) programme, which works directly with catering businesses to provide sustainable seafood⁶ and helps consumers identify such menus when dining out. The programme attracted 58 restaurant outlets in total. The Ocean Friendly Catalogue (OFC) programme was rolled out at the same time. The OFC is aimed at seafood suppliers and involves WWF-Hong Kong enabling connections between catering businesses and these suppliers, allowing interested caterers to source sustainable seafood from them⁷. Sustainable Seafood Business Seminars were organized in 2010, 2011, 2012 and most recently in December 2015, initiating further collaboration and experience sharing with Hong Kong's catering business sector⁸. Hong Kong's first Sustainable Seafood Week was launched in 2011, driving public awareness and interest in this issue to a new level. The second Sustainable Seafood Week was successfully held in late June and early July 2015⁹.

Since 2007, some 500,000 hard copies of the WWF-Hong Kong Seafood Guide have been distributed. To keep the Seafood Guide up to date and relevant, WWF-Hong Kong launched a revised version in 2013¹⁰. This new Seafood Guide features more than 70 types of seafood available in Hong Kong which are then divided into three colour ratings. A Seafood Guide smartphone application was subsequently launched in 2014¹¹, allowing smartphone-equipped consumers to have seafood sustainability information, restaurant listings and the latest seafood news available at their fingertips.

5. THE WWF SEAFOOD GUIDE



© Allen To

Live fish tanks showing a variety of seafood in a seafood restaurant in Hong Kong

5.1 WHAT IS THE WWF SEAFOOD GUIDE?

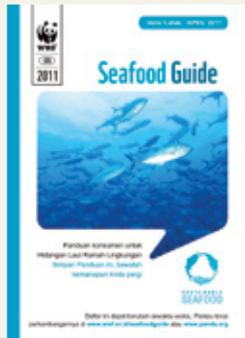
The Seafood Guide is essentially a tool to raise public awareness and to help consumers make sustainable seafood choices¹². The Seafood Guide has now been published by about 20 WWF offices worldwide and has become a global tool that is adapted locally to address local seafood sustainability issues and reflect the fact that different species are available in different markets. For example, the seafood listed in the WWF-Hong Kong Seafood Guide differs markedly from the one published in Japan.



WWF-Germany



WWF-Austria



WWF-Indonesia



WWF-Malaysia



WWF-Norway



WWF-Singapore



WWF-South Africa



WWF-Sweden



WWF-Hong Kong

5.2 HOW IS SEAFOOD ASSESSED IN THE WWF SEAFOOD GUIDE?

The same methodology is shared by WWF offices around the world to assess seafood sustainability. This methodology is publicly accessible¹³. To assess wild-caught seafood, three overarching areas are examined: the population trend of a species in the wild, the effect of catching that species on its habitat and ecosystem, and the effectiveness of the management of its fishery. When assessing farmed seafood, four broad areas are examined: the source of the fry, the sustainability and traceability of the fish feed, the effect of farming the species on the surrounding habitat and ecosystem, and the effectiveness of the species' aquaculture management. The overall scores from the assessments determine the colour rating of the seafood.

Seafood assessments are conducted by third parties with recognized experience and expertise in seafood sustainability assessment. Before being published in the Seafood Guide, the assessment results are peer-reviewed by experts or scientists familiar with the seafood or fisheries being assessed.

Notably, although WWF does not publish Seafood Guides for several major countries like Australia and the US, we have conducted seafood assessments for these countries. The results of all seafood assessments made for the Seafood Guide are shared across WWF's global offices through an internal global seafood assessment database. Furthermore, new seafood species are continuously being added for assessment, and seafood assessments are also updated regularly.

5.3 INSIDE THE WWF SEAFOOD GUIDE

Based on the assessment results, seafood species are categorized into three distinct colour ratings within the Seafood Guide: "Green – Recommended", "Yellow – Think Twice" and "Red – Avoid". Seafood types in the "Green – Recommended" category are recommended for consumption by WWF. At the other end of the spectrum, WWF advises people to never consume seafood which falls in the "Red – Avoid" category. In Hong Kong, when WWF-Hong Kong works with the business sector, seafood in the "Yellow – Think Twice" category is usually deemed acceptable for consumption. While "Yellow" seafood should only be consumed after evaluating other options, it is far more preferable to seafood in the "Red – Avoid" category. Seafood coming from fisheries certified by MSC or ASC is recommended by WWF and is always included in the "Green – Recommended" category.

To further elaborate on some of the considerations taken into account in the seafood assessment, for instance, line caught leopard coral trout from Queensland, Australia, is listed in the "Green – Recommended" category, because of effective management measures such as stock monitoring and assessment, annual quota, fish size restriction and closed season during fish spawning period. This ensures the relatively healthy status of this species in Queensland. In addition, the use of hook and line as fishing gear has little impact on the seabed.

Atlantic salmon farmed in floating net cages in Norway is listed in the "Yellow – Think Twice" category. Despite the fact that juveniles are hatchery-based, the escape of salmon from the farm is an issue and can transfer disease and parasite to the wild species. Although traceability system is in place for feed components, wild fish is used in the production of fish feed for salmon and the quite a large amount of fish feed is needed. The regulatory framework of salmon farming in Norway is considered partially effective.

Golden threadfin bream, which is caught by bottom long-lining within Hong Kong and the South China Sea, is in the "Red – Avoid" category. Although the use of bottom long-lining has relatively smaller impact on the seabed, fisheries of this species in this region is not well-monitored and the regulatory framework to manage the fishery is only considered partially effective. Catches of this species is estimated to have plummeted by about 30% over the last decade, and this species is listed "Vulnerable" by the International Union for the Conservation of Nature (IUCN).



建議 RECOMMENDED			建議 RECOMMENDED		
品種 SPECIES	來源 ORIGIN	方法 METHOD	品種 SPECIES	來源 ORIGIN	方法 METHOD
長鱮吞拿魚 Albacore tuna	加拿大/斐濟 Canada/ Fiji	🌊🐟	波士頓龍蝦 Boston lobster	加拿大 Canada	🌊
雪花鱈魚 Chilean sea bass	英屬南喬治亞島 South Georgia, UK	🌊🐟	龍蝦 Rock lobster	澳洲昆士蘭 Queensland, Australia	🌊
鱈魚 Pacific cod	美國 US	🌊🐟	鮑魚 Abalone	澳洲 Australia	🌊
比目魚 Pacific halibut	美國 US	🌊🐟	鮑魚 Abalone	中國 China	🐟
藍尖尾鱈魚 Hoki	紐西蘭 New Zealand	🌊🐟	蜆 Clam	中國 China	🐟
狹鱈魚 Pollock	美國 US	🌊🐟	海參 Sea cucumber	加拿大西部 W Canada	🌊
三文魚 Pacific salmon	加拿大 Canada	🌊🐟	象拔蚌 Geoduck clam	加拿大/美國 Canada/ US	🐟
海蝦 Northern shrimp	加拿大 Canada	🌊🐟	螺 Oyster	中國/美國 China/ US	🐟
龍躉 Giant grouper	香港 Hong Kong	* 🐟 (室內 indoor)	帶子 Scallop	中國/日本 China/ Japan	🐟
東星斑 Leopard coral trout	澳洲昆士蘭 Queensland, Australia	🌊	帶子 Scallop	昆士蘭/西澳 Queensland/ W Australia	🌊
		🌊 野外捕撈 WILD CAUGHT 🐟 養殖 FARMED			🌊 野外捕撈 WILD CAUGHT 🐟 養殖 FARMED



想清楚 THINK TWICE			想清楚 THINK TWICE		
品種 SPECIES	來源 ORIGIN	方法 METHOD	品種 SPECIES	來源 ORIGIN	方法 METHOD
三文魚 Atlantic salmon	愛爾蘭/挪威/蘇格蘭 Ireland/ Norway/ Scotland	🐟	黃魷鮑 Pompano	香港 Hong Kong	* 🐟
三文魚 Pacific salmon	美國 US	🌊	石蚌 Star snapper	香港 Hong Kong	* 🐟
銀鱈魚 Black cod	美國 US	🌊	多寶魚 Turbot	中國 China	🐟
沙甸魚 Sardine	西班牙 Spain	🌊	泥鯚 White-spotted rabbitfish	南中國海 S China Sea	🌊
黃鱈吞拿魚 Yellowfin tuna	印尼/菲律賓 Indonesia/ Philippines	🌊	海蝦 Prawn	澳洲昆士蘭 Queensland, Australia	🌊
龍躉 Giant grouper	香港 Hong Kong	* 🐟 (魚塘 pond)	青蟹 Mud crab	中國 China	🐟
鯪魚 Grass carp	中國 China	🐟	鮑魚 Abalone	南非 S Africa	🌊
烏頭 Grey mullet	香港 Hong Kong	* 🐟	海參 Sea cucumber	加拿大東部 E Canada	🌊
寶石魚 Jade perch	香港 Hong Kong	* 🐟	海膽 Sea urchin	南中國海 S China Sea	🌊
紅袖 Mangrove snapper	香港 Hong Kong	* 🐟	刺參 Spiky sea cucumber	中國 China	🐟
鯪魚 Mud carp	中國 China	🐟			
		🌊 野外捕撈 WILD CAUGHT 🐟 養殖 FARMED			🌊 野外捕撈 WILD CAUGHT 🐟 養殖 FARMED



避免 AVOID			避免 AVOID		
品種 SPECIES	來源 ORIGIN	方法 METHOD	品種 SPECIES	來源 ORIGIN	方法 METHOD
藍鱈吞拿魚 Bluefin tuna	全球 Global	🌊🐟	西星斑 Sqauretail coral trout	東南亞 SE Asia	🌊
黃鱈吞拿魚 Yellowfin tuna	印尼/菲律賓/菲律賓 (延繩釣 long-lining)	🌊	老虎斑 Tiger grouper	東南亞 SE Asia	🐟
魚子醬 (鱈魚) Caviar (sturgeon)	全球 Global	🌊	大眼雞 Bigeye	南中國海 S China Sea	🌊
雪花鱈魚 Chilean sea bass	全球 Global	🌊	紅衫魚 Golden threadfin bream	南中國海 S China Sea	🌊
銀鱈魚 Black cod	美國 US (底拖網 bottom trawl)	🌊	馬頭 Horsehead	南中國海 S China Sea	🌊
龍躉 Sole	紐西蘭 New Zealand	🌊	白鮫 Silver pomfret	南中國海 S China Sea	🌊
劍魚 Swordfish	全球 Global	🌊	羅漢魚 Tilapia	香港 Hong Kong	🐟
芝麻斑 Areolate and Duskytail grouper	香港 Hong Kong	🐟	黃花魚 Yellow croaker	中國 China	🐟
杉斑 Camouflage grouper	東南亞 SE Asia	🌊	潮屎蝦 Mantis shrimp	南中國海 S China Sea	🌊
龍躉 Giant grouper	香港 Hong Kong (網箱 sea cage)	🐟	海蝦 Shrimp	南中國海 S China Sea	🌊
老龍躉 High-finned grouper	東南亞 SE Asia	🌊	實蝦 Shrimp	亞洲 Asia	🐟
紅斑 Hong Kong grouper	中國 China	🐟	紅花蟹 Red crab	南中國海 S China Sea	🌊
蘇眉 Humphead wrasse	東南亞 SE Asia	🌊	響螺 Conch	美國 US	🌊
東星斑 Leopard coral trout	東南亞 SE Asia	🌊	墨魚 Cuttlefish	南中國海 S China Sea	🌊
青斑 Orange-spotted grouper	泰國 Thailand	🌊	刺參 Spiky sea cucumber	日本 Japan	🌊
沙巴龍躉 Sabah grouper	馬來西亞 Malaysia	🌊	魷魚 Squid	南中國海 S China Sea	🌊
		🌊 野外捕撈 WILD CAUGHT 🐟 養殖 FARMED			🌊 野外捕撈 WILD CAUGHT 🐟 養殖 FARMED

The WWF-Hong Kong Seafood Guide

5.4 CATERING BUSINESSES AND WWF SEAFOOD GUIDE

The Seafood Guide is the key tool employed in our OFM and OFC programmes in Hong Kong. Catering businesses working with WWF-Hong Kong in our OFM programme share lists of seafood items which are then assessed against the Seafood Guide. Seafood assessed as being in the “Green – Recommended” or “Yellow – Think Twice” categories are then potentially included in the OFM. If seafood is assessed as being in the “Red – Avoid” category, WWF-Hong Kong will then offer alternative seafood choices for the caterers’ consideration. In addition, alternative seafood suppliers that have worked with WWF-Hong Kong to produce OFCs are introduced to these caterers and then help them source sustainable seafood.

The OFM can come in various forms – an entirely separate menu or a specific section on an existing menu. The OFM carries a standard statement saying that all seafood items on the menu are sourced according to WWF-Hong Kong’s Seafood Guide criteria. Seafood items on these menu also have the species, origin and production methods listed. Significantly, the cover of the Seafood Guide is also included as a logo on the menu, helping consumers instantly recognize the OFM.

In recent years, some of the leading businesses from the catering sector in Hong Kong have made significant progress beyond the establishment of OFM. These businesses partner with WWF-Hong Kong to undertake more in-depth seafood sustainability assessment to understand the existing seafood sustainability performance of their businesses, bases on which the business and WWF-Hong Kong discuss and prioritize approaches to improve the overall sustainability of seafood, for example through increasing the proportion of sustainable seafood and phasing out of unsustainable seafood, jointly develop a time-bound action plan and formulate a target on seafood sustainability. This holistic approach can ensure even greater positive impact in the fishery resource. Specific and detailed case studies on this approach are discussed in details in Section 6 of this report.



OFM from Cafe Deco



OFM from The Helena May



OFM from Maxim's Chinese restaurants



© WWF-Hong Kong

Oyster coming from sustainable source is often a popular item of OFM in Western restaurant.

5.5 SEAFOOD SUPPLIERS AND WWF SEAFOOD GUIDE

Seafood suppliers working with WWF-Hong Kong through the OFC programme begin the process by sharing the company’s seafood list, which is then assessed against the Seafood Guide. Seafood assessed as being in the “Green – Recommended” or “Yellow – Think Twice” categories is then included in the OFC of that particular seafood supplier. This OFC can then be used by the supplier for promotional purposes and can also be shared with other catering businesses working with WWF-Hong Kong in the OFM programme.

These OFCs contain information about the seafood included in the catalogue, including the species, origin and production methods. The cover of the Seafood Guide is also included as a logo on the catalogue, which then helps catering businesses quickly recognize the OFC.

KLG Fine Food Company Limited 嘉安優質食品有限公司
 Office: 10/F, 10/F, Air Hong Court Building, No. 234 Queen's Road, Central, Hong Kong
 Tel: (852) 2528 8278

PRODUCT CATALOGUE
 This catalogue contains only ocean-friendly seafood according to WWF-Hong Kong Seafood Guide.

DESCRIPTION	ORIGIN	SOURCE	FORMS	SPKS
Atlantic Tuna (Yellowfin) 黃皮金槍魚 (Third party certified sustainable)	U.S.A.	Wild Caught	Loin	-
Atlantic Salmon 三文魚 (Third party certified sustainable)	Norway	Culture	Filets, skin-on Filets, skin-off	200g 1.75kg/box
Primes 鮭魚 (Third party certified sustainable)	Norway	Wild Caught	Whole, skin-on	275-420g/box 320-370g/box 430-470g/box
Pangasius 巴拿馬魚 (Third party certified sustainable)	Vietnam	Culture	IGF Filet, skin-off	220g up to 100% Natural/100% STPP 220g up to 100% Natural/100% STPP 220g up to 100% Natural/100% STPP
Salmon 鮭魚 (Third party certified sustainable)	Norway	Wild Caught	whole, no gills	Whole size, from 200-250g to 900g/box

OFC from KLG Fine Food Co. Ltd.

New Bon Marine (HK) Limited 味鮮食品有限公司
 Room 8, 10/F., Fu Cheung Centre, 8-7 Wang Chai Street, Fu Tin, Sha Tin, N.T.
 Tel: (852) 2661 8888

PRODUCT CATALOGUE
 This catalogue contains only ocean-friendly seafood according to WWF-Hong Kong Seafood Guide.

DESCRIPTION	ORIGIN	SOURCE	FORMS	SPKS
Salmon 鮭魚 (Third party certified sustainable)	New Zealand	Wild Caught	-	-
Pangasius 巴拿馬魚 (Third party certified sustainable)	Vietnam	Culture	-	-
Atlantic Salmon 三文魚 (Third party certified sustainable)	Australia	Culture	-	-
Atlantic Salmon 三文魚 (Third party certified sustainable)	Norway	Culture	-	-
Salmon, Wildage Pollock 鮭魚 (Third party certified sustainable)	Alaska	Wild Caught	-	-

OFC from New Bon Marine (HK) Ltd.

Worldwide Seafood Limited 環球海產有限公司
 Flat A1, 6/F., Man Ho Factory Building, 188-191A Kings Road, Quarry Bay, Hong Kong
 Tel: (852) 2511 8888 Fax: (852) 2563 0200

PRODUCT CATALOGUE
 This catalogue contains only ocean-friendly seafood according to WWF-Hong Kong Seafood Guide.

DESCRIPTION	ORIGIN	SOURCE	FORMS	SPKS
Atlantic Salmon 三文魚 (Third party certified sustainable)	Norway	Culture	-	-
Atlantic Salmon 三文魚 (Third party certified sustainable)	Australia	Culture	-	-
Atlantic Salmon 三文魚 (Third party certified sustainable)	Ireland	Culture	-	-
Salmon 三文魚 (Third party certified sustainable)	Canada	Wild Caught	-	-
Polynesian Tuna / Ocean Sea Bass 藍皮金槍魚 (Third party certified sustainable)	Australia	Wild Caught	-	-

OFC from Worldwide Seafood



© Allen To

Unregulated bottom trawling can have considerable negative impact on the marine ecosystem, such as destruction on habitats and large amount of juvenile fishes. Seafood harvested using this method is often assessed as "Red – Avoid" category.

6. THE RECENT INDUSTRY UPTAKE OF SUSTAINABLE SEAFOOD IN HONG KONG

6.1 THE SUPPLIER PERSPECTIVE

Business Nature

Seafood suppliers are generally not public-facing; nevertheless, they are key stakeholders on Hong Kong's seafood supply chain. The rate of uptake and general trends in sustainable seafood reflected by seafood suppliers can provide major insights into how sustainable seafood is positioned in the industry at any given time. For the sake of clarity, in this section the term "seafood supplier" refers to suppliers which mainly deal in frozen and chilled seafood products (major product types include cod, tuna, various types of flatfish, salmon, clams, oysters and scallops), but excludes live seafood traders – i.e. live fish traders who also deal in other live seafood. Their industry outlook is discussed later in this section.

Demand and Trends

Sustainable seafood in Hong Kong is showing signs of incremental positive growth. Based on sales volume figures collected by WWF-Hong Kong from three major Hong Kong-based seafood suppliers¹⁴, between 2010 and 2014, combined sustainable seafood sales have more than doubled, increasing from 1,550 tonnes to 3,819 tonnes over the period. In addition, the percentage share of sustainable seafood in relation to the entirety of seafood products carried by these suppliers steadily increased during the period. Significantly, according to these seafood suppliers, the price difference between sustainable seafood and unsustainable seafood also changed considerably over the years. This difference has narrowed to about 10 to 15 per cent in recent years, down from 30 to 50 per cent in 2007, mainly due to increased local demand and increased overseas availability.

It is also worth noting that the number of seafood suppliers that have received a chain of custody certification (CoC) from MSC and ASC – a certification related to seafood traceability – has steadily increased over the past few years, with a particularly prominent increase since 2013. As of 13 May 2016, there were 16¹⁵ and five¹⁶ seafood suppliers in Hong Kong with valid CoC certifications for MSC and ASC products respectively. This upturn also reflects the fact that the demand for sustainable seafood has increased, especially for products certified with MSC and ASC eco-labels.

Challenges and Solutions



© Jürgen Freund / WWF

Shrimp fishermen with push nets at sunset. Bicol, Philippines

The industry outlook for the live seafood trade is somewhat different. This part of the seafood trade generally involves suppliers whose key seafood products come in live form; with prominent seafood products including live fish like groupers, snappers and wrasses; shrimp, mantis shrimp, crabs and others. For the purposes of this report, the live seafood trade also covers the trade in freshwater products such as various types of carp, eels, freshwater shrimp and crabs. With the possible exception of carp, many of these live seafood products, especially live fish, which have been assessed by WWF are in the “Red – Avoid” category of the Seafood Guide including many groupers, freshwater eels and shrimp.

In Hong Kong, live groupers are a principal dish at local banquets. The Seafood Guide assesses a range of grouper species; again many of these fall into the “Red – Avoid” category¹⁷. Alternatives for live fish like groupers do exist – these include line caught leopard coral trout from Queensland, Australia and indoor farmed giant grouper from Hong Kong. Both these species are in the Seafood Guide’s “Green – Recommended” category and are important alternatives for catering businesses to source when establishing their OFMs, especially for Chinese banquet menus.

Another live seafood product which is extremely popular in Hong Kong is shrimp. Wild caught shrimp from the South China Sea and a number of types of farmed shrimp from Southeast Asia, including whiteleg shrimp, black tiger shrimp, and giant river prawn, have been assessed by WWF as “Red – Avoid”¹⁸. A few years ago, this had an impact on businesses which were interested in sourcing sustainable seafood, as alternatives were not readily available at that time. These days it is a different story, as a number of alternatives now exist in Hong Kong, like MSC-certified cold water shrimp from Canada, MSC-certified king prawns from South Australia and ASC-certified shrimp from Vietnam, all of which are in the “Green – Recommended” category of the Seafood Guide.

Summary

Over the years, sustainable seafood products have improved in overall competitiveness against unsustainable seafood products in Hong Kong and information collected have uncovered signs of an increasing uptake of sustainable seafood products in the sector. However, it is evident that sustainable seafood is still not highly accessible to all sectors of Hong Kong's seafood industry and sustainable seafood products are far from being mainstreamed in the Hong Kong market. As more types of sustainable seafood continue to emerge on the global market, seafood suppliers can play an active role in promoting sustainable seafood by identifying and sourcing a broader sustainable seafood product range to serve the Hong Kong market.



© Allen To

Groupers harvested from sustainable sources have still not been mainstreamed in Hong Kong market.

6.2 THE CATERING SECTOR PERSPECTIVE



© WWF-Hong Kong

Catering business can play an important role in protecting the ocean by deciding what to be served in the restaurant outlets.

Business Nature

Hotels and catering groups are public-facing and the seafood which they source often closely follows existing consumer demand. As these businesses are generally very competitive and comparisons are unavoidable, actions undertaken by any major group in Hong Kong can serve to forecast medium-term trends in the industry. This fact is particularly relevant to brand-sensitive businesses in the hospitality industry like hotels which have been focusing on corporate sustainability for years. It is also relevant to forward-thinking catering groups, which increasingly regard sustainability as a new area in which they can differentiate themselves from their business competitors. This section highlights five case studies: four business cases which elaborate on the details of particular brands' sustainable seafood sourcing journeys, and one territory-wide sustainable seafood event.

Case Study One – Hong Kong Maxim’s Group

Hong Kong Maxim’s Group (“Maxim’s”) is one of the largest catering groups in Hong Kong, operating a range of catering outlets including but not limited to Cantonese, Chiu Chow, Provincial, Western, Japanese, Vietnamese and Thai restaurants, fast food shops, cakes and bakery shops, cafés and other catering services, operating over 960 outlets in Hong Kong, mainland China, Vietnam and Cambodia¹⁹. Maxim’s joined WWF-Hong Kong’s Alternative Shark-free Menu programme in 2011, about a year after the programme’s launch. Subsequently, in 2014 Maxim’s worked with WWF-Hong Kong to provide an OFM in its Chinese restaurants. With the support of WWF-Vietnam, Maxim’s also worked with the company’s major basa (a species of catfish) suppliers in Vietnam, transforming the basa farm in order to obtain ASC certification in 2014. Currently, all basa products served by Maxim’s are ASC-certified. Additionally, Maxim’s fast food chain – Maxim’s MX – was the first such chain to promote ASC-certified products in Hong Kong, something the company did during WWF-Hong Kong’s Sustainable Seafood Week held in June and July 2015²⁰.

Maxim’s recently partnered with WWF-Hong Kong to assess the sustainability of seafood products sourced by the group and to decide on steps to improve the overall sustainability of seafood sourced by Maxim’s.



“Our group strives to offer diverse food and beverage items while taking environmental factors into consideration to ensure a sustainable future. We have been providing “Ocean-friendly Menu” since 2014 and also actively promoting sustainable seafood, e.g. facilitating our supplier to acquire ASC certification, as we believe only through a continuous effort that we can help contribute to conservation.”

Norbert Tan
General Manager
Supply Chain & Quality Assurance
Maxim’s Caterers Ltd.

Case Study Two – Hyatt Hotels Corporation

Hyatt Hotels Corporation (“Hyatt”) is a global hospitality company operating a range of hotel and resort brands worldwide. The company’s portfolio comprises 627 properties in 52 countries²⁴. In August 2014, Hyatt announced a global initiative to partner with WWF to increase the procurement of responsibly-sourced seafood at Hyatt hotels, with a goal of sourcing more than 50 per cent of the hotels’ seafood inventory from responsible sources by 2018²⁵. Within this goal, at least 15 per cent of the inventory will come from MSC- or ASC-certified fisheries, while the other 35 per cent, at a minimum, will either be seafood listed as “Green – Recommended” on WWF Seafood Guide or in the WWF global seafood assessment database, or in a formal fishery or aquaculture improvement project (FIP or AIP), or from farms certified against a predetermined list of schemes. In addition, under this time-bound commitment, Hyatt will have removed shark fin products globally, eliminated sourcing of highly unsustainable seafood identified by WWF, and measured the global performance and progress of these efforts against WWF’s analysis and recommendations.

Hyatt operates three hotels in Hong Kong. These hotels have stopped serving shark fin and actively participated in WWF-Hong Kong's Sustainable Seafood Week held in June and July 2015. Hyatt hotels in Hong Kong are all involved in the company's global sustainable seafood initiative, and are now working with WWF-Hong Kong to review the sustainability status of their existing seafood offerings. This will allow them to adapt their global sustainable seafood policy to the local context, ultimately improving the sustainability of seafood sourced by the three hotels. The partnership in Hong Kong is a pilot project, the results of which will allow Hyatt to implement their global policy across Asia. The implementation experience and best practices gained through this partnership in Hong Kong will provide useful information for Hyatt when their plan is implemented more widely in other countries and territories in Asia.



“The depletion of world’s fisheries is a global issue. Hong Kong can and should play a proactive role to work out local solutions which can create a global impact.”

Marco Avitabile
Regional Vice President (Food and Beverage – Asia Pacific)
Hyatt Hotels Corporation

Case Study Three - The Hongkong and Shanghai Hotels, Limited

The Hongkong and Shanghai Hotels, Limited (“HSH”) is engaged in the development, ownership and management of a range of hotel, commercial and residential properties in key destinations in Asia, the US and Europe²¹. In Hong Kong, HSH’s hotel business operations include The Peninsula Hong Kong. In 2012, HSH stopped serving shark fin across all of the company’s owned food outlets. In 2013, HSH collaborated with WWF-Hong Kong to assess a range of seafood products sourced by The Peninsula Hong Kong, based on both the Seafood Guide and WWF’s global seafood assessment database. This collaboration has allowed HSH to develop a broader sustainable seafood strategy. In 2014, HSH announced a time-bound commitment to avoid serving a range of unsustainable seafood products and committing to only serving seafood that is considered sustainable by referring to seafood guides such as those published by WWF by 2020²². Also in 2014, HSH conducted a review of the sustainability status of seafood sourced by their hotel operations in Tokyo, Manila and Bangkok in conjunction with WWF. This review provided useful information to HSH, allowing them to implement their sustainable seafood sourcing commitment²³.

HSH is now in the process of putting their commitment into practice.

Case Study Four - Ocean Park Hong Kong

Ocean Park Hong Kong (“Ocean Park”) is one of the two major theme parks in Hong Kong. It attracted about 7.4 million guests in a recent year²⁶. Since 2009 Ocean Park has been offering sustainable seafood dishes and in 2012, Ocean Park became Asia’s first theme park to use only sustainably sourced seafood in its restaurants and bakery, using WWF’s Seafood Guide as a key resource to determine seafood sustainability²⁷. In June 2015, the Park further strengthened and expanded its efforts to promote sustainable seafood consumption by establishing a corporate Sustainable Seafood Policy, and by using only sustainably sourced seafood in all food outlets at the Park²⁶. Ocean Park also announced that it would only use MSC-certified seafood to produce fish balls for the Park, a first in Hong Kong²⁸ and possibly also a first in Asia.

As Ocean Park continues its journey towards fully sustainable seafood sourcing, WWF-Hong Kong will provide advice on seafood sustainability through the Seafood Guide and the WWF global seafood assessment database.



“WWF has proven to be a pioneer and visionary in conservation and environmental protection, in particular, a leader in promoting sustainable seafood. WWF started raising awareness on this subject way before it becomes a hot topic, and Ocean Park has had a longstanding partnership with WWF-HK. Since 2009, Ocean Park has started offering sustainably sourced seafood to our guests and it is the WWF-HK Sustainable Seafood Guide that we make reference to and seek verification when encountered with non-assessed seafood species.”

Frankie Hau
Director-Risk & Environmental Management
Ocean Park Corporation

Case Study Five - WWF-Hong Kong’s Sustainable Seafood Week 2015

WWF-Hong Kong’s Sustainable Seafood Week is a major public engagement activity initiated and undertaken by WWF-Hong Kong to raise awareness about sustainable seafood among the public and the business sector. The first Sustainable Seafood Week was held in 2011 and saw nine catering outlets participate. These were mainly Western restaurants based in the SoHo area of Hong Kong Island . The second Sustainable Seafood Week, held in June and July 2015, was supported by a much larger number of outlets – 114 in total³⁰. The participating restaurants came from a more diverse spectrum, including Chinese and Western restaurants, hotels and clubhouses. Notably, the event also gained the support of a fast food chain and a Hong Kong-style teahouse. Of the 80 per cent of participating outlets for which sales data could be compared, the event saw a 31.4 per cent increase in sales of sustainable seafood dishes³¹. Sustainable Seafood Week 2015 also appeared in more than 270 distinct news reports. Comments from participating restaurants illustrated that continued promotion of sustainable seafood is both desired and needed. City-wide sustainable seafood promotional events are an important way to drive demand for sustainable seafood and gain the support of a wider group of industry players.

Summary

These business cases indicate that more and more stakeholders from across the catering industry in Hong Kong are responding positively to the sustainable seafood movement. The sustainable seafood market in Hong Kong is maturing and diversifying, and is becoming increasingly ready for a larger market transformation. Catering businesses, even within the same sector, often have unique challenges to overcome when adopting a sustainable seafood sourcing commitment; this is reflected in the fact that different catering businesses work with WWF-Hong Kong in different ways. The flexibility and practicality of any approach are key success factors, but the support of such a broad range of catering businesses at our most recent promotional event proves that on-going promotion is essential in helping sustainable seafood become increasingly accessible and eventually mainstream in Hong Kong.



© WWF-Hong Kong

While WWF-Hong Kong is actively engaging with the food and beverage industry, it is crucial to raise public awareness and educate the public about sustainable seafood.

7. HOW CAN YOUR BUSINESS WORK WITH WWF-HONG KONG TO IMPROVE THE SEAFOOD SUSTAINABILITY AND DRIVE CHANGES?

- Source and sell more seafood in the “Green – Recommended” category of the WWF Seafood Guide, particularly MSC and ASC certified products, apply for respective chain of custody certification if applicable, and phase out seafood in the “Red – Avoid” category
- Work with WWF-Hong Kong to jointly develop Ocean Friendly Catalogue or Ocean Friendly Menu, and / or
- Partner with WWF-Hong Kong to undertake in-depth seafood sustainability assessment, jointly prioritize actions, develop a time-bound action plan and formulate a target to improve the sustainability of the seafood sourced by your business



© KLG Fine Food

Seafood supplier that has attained MSC or ASC chain of custody certification could use the relevant logo on the certified products and promotion materials to ensure traceability.

7. HOW CAN YOUR BUSINESS WORK WITH WWF-HONG KONG
TO IMPROVE THE SEAFOOD SUSTAINABILITY AND DRIVE CHANGES?



© naturepl.com / Frederic Larrey / WWF

Fisherman casting net over gilt-head bream (*Sparus aurata*) fish farm, the Frioul Island, Marseille, France.

8. WHAT DO INDUSTRY PLAYERS SAY ABOUT THE SUSTAINABLE SEAFOOD MOVEMENT IN HONG KONG?

(IN ALPHABETICAL ORDER BY COMPANY NAME)



“Recognizing the important role we play in creating greater awareness of environmental protection and providing environmentally conscious choices to our customers, the Group has been working closely with our suppliers to expand our sustainable seafood range guided by the WWF Seafood Guide. We hope our customers will be served by a variety of quality sustainable seafood in our chains, both MSC / ASC certified or recommended by WWF Seafood Guide. We also wish to see sustainable seafood becoming more accessible and eventually the mainstream in the market in Hong Kong, which can only be achieved through collaborative effort by businesses, NGOs and the Government.”

Wing Lau
Assistant Corporate Director
Procurement
Café de Coral Holdings Limited



“It seems an economic certainty, that education of the public and businesses is the most efficient activity for developing best practices in environmental conservation. WWF is the leader in providing excellent, fact-based, information-rich resources for procuring and enjoying the bounty of our seas, sustainably. Their work in research, publication, certification, and advocacy appears to be a perfectly balanced approach between the needs of our planet and the practicality of our ambitions. Their excellent work on this will continue be much needed for many years to come, and is an activity very much worth our effort to support and expand. More engagement, promotion, awareness-raising on sustainable seafood by all stakeholders including NGOs, seafood businesses and the Government will certainly help building up stronger momentum in the sustainable seafood movement in Hong Kong.”

Christopher Gallaga
Business Manager, Food Service Business
Food and Beverage Business Unit, Hong Kong Market
City Super Ltd



“Cathay Pacific is one of the earliest airlines to introduce MSC certified seafood inflight. In 2011, Swire Hotels stopped serving shark fins and started serving according to the WWF HK’s Seafood Guide. The awareness of the industry and public towards shark fin and shark products has increased significantly thanks to the works done by WWF. However, the awareness of seafood sustainability other than shark is still low. More need to and can be done by the industry and the public. Stakeholders along the supply chain can play their unique and active roles. You and me, as customers, could join hand to make the right choice to drive the transformation of the market!”

Samuel Kwong
Group Sustainable Development Manager
John Swire and Sons (H.K.) Limited



“WWF’s initiative of Sustainable Seafood campaign since 2007 has been playing a very significant role and has been acting as the pioneer on raising the public awareness in Hong Kong on the importance of sustainable seafood consumption. We are very excited and being encouraged in participating this campaign since 2013. We believed that sustainable seafood promotion campaign could be more sustainable only with collective participation and commercial success. The Government’s initiative and participation in the campaign, especially on intensive review on the current policy on tackling IUU, impose positive measures and support on sustainable certification, will offer very strong incentive to the industry to create an encouraging environment for business sustainability and in the same time promoting sustainable seafood development in Hong Kong.”

Kary Leung
Operation Director
KLG Fine Food Company Limited



“Glad to see that WWF has done some amazing ground work promoting sustainable seafood in Hong Kong, a challenging market in this regard. Traditional “delicacies,” such as shark fin, are deeply rooted in peoples’ consumption habits. The Seafood Guide and comprehensive presentation organized by WWF towards foodservices and end users have significantly helped influence in individuals’ buying decisions. It is a great achievement in my opinion.

I spoke with a local seafood distributor the other day who is from a fishing family. Her family was forced to leave the fishing business due to declining catching resources. She is now devoted to supporting WWF’s activities. Her experience may be shared by thousands of local fishermen. We should be more determined to promoting awareness on this matter broadly. There is a long way to making sustainable seafood the peoples’ first choice, beyond price. Completely stopping Illegal Unreported Unregulated fishing is the ultimate goal.”

Makiko Karasawa
Seafood Consultant
Lordly Company Limited



“Some clients have started to search for information of sustainable seafood since few years ago which was extremely new to us. Being introduced into the market in these couple of years, sustainable seafood is now recognized by the industry as a trend for future development, and the demand for sustainable seafood is growing steadily. Different hotels, clubhouses, Western restaurants as well as Chinese restaurants also have enquiries on this. We hope that the industry, environmental organizations, the Government and other stakeholders could strengthen the collaboration work in order to pave the path for sustainable seafood in Hong Kong.”

Francis Lau
Senior Marketing & Sales Manager
Sun Wah Marine Products (HK) Co Ltd



“We are happy to see that the work WWF has done in the past 5 years has helped to increase awareness of the dire situations of seafood around the world and improve the availability of sustainable seafood in Hong Kong. The Seafood Guide and sourcing advice from WWF has helped the hospitality industry to switch to sustainable seafood. We do believe opportunities exist to make sustainable seafood adopted more widely in the Hong Kong community. We hope to see more and more promotional activities undertaken by organisations such as WWF, businesses and the Government to pave the way for this.”

Betty Simpson
General Manager
The Helena May

9. CONCLUSION

Over the past few years, sustainable seafood has gradually begun to take root in Hong Kong. The business sector, which conventionally focuses more on brand image and environmental sustainability, has been an early mover in this regard. After realizing that sustainable seafood can help differentiate them from their competitors, other industry players are now starting to show an interest in this issue. Seafood suppliers are often the first group of stakeholders to respond to the winds of change; this has certainly been the case in Hong Kong. The positive response from catering businesses in terms of sustainable seafood, as well as the increasing sales volumes and the increasingly wide spectrum of catering businesses supporting the movement all strongly suggest that the sustainable seafood market in Hong Kong is maturing and is ready for a larger-scale transformation. On-going promotional events are widely regarded by the industry as an essential element for sustaining the traction of any movement and have so far been a proven approach to driving the demand for sustainable seafood. Seafood suppliers and catering sector play important roles in this journey by sourcing and providing more sustainable seafood products to clients and customers through OFC and OFM programmes. Businesses could further their achievement on sustainable seafood by partnering with WWF-Hong Kong to jointly develop a practical and impactful action plan and target to improve the overall seafood sustainability of the business. As long as this ever-more conducive environment continues, then the sustainable seafood movement will truly begin to thrive in Hong Kong, ensuring sustainable seafood to become more accessible and eventually mainstream products in the market.





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THE SUSTAINABLE SEAFOOD MOVEMENT IN HONG KONG - PROGRESS, PROSPECTS AND CHALLENGES



170+

Hong Kong imports seafood from more than 170 countries and territories around the globe

2

Hong Kong is the second largest per capita consumers of seafood in Asia



114

Number of restaurants and shops participated in WWF-Hong Kong's Sustainable Seafood Week in 2015

90%

Over 90% of respondents in a WWF-Hong Kong's survey conducted in 2014 said they were willing to avoid an unsustainable seafood item if they knew its status



Why we are here

To stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature.

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