

The South African experience with MSC certification: A perspective



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ABSTRACT

Perspectives on the South African experience with Marine Stewardship Council (MSC) certification, specifically that of the valuable hake trawl fishery which is as yet the only MSC certified fishery in Africa, are summarised based on discussions with local scientists and fishing industry members. On the positive side, the greatest benefit has been the resultant enhanced attention given to science. However, the fact that some MSC requirements relate to government rather than industry responsibilities raises the issue of the extent to which government omissions should result in penalties to industry. At a broader level, the question of whether raising or lowering of MSC standards would be in the best interests of promoting and achieving fisheries sustainability globally is discussed.

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1. Introduction

A major objective of ecolabeling is to improve the management and thereby the status of the world's fisheries by creating market-related incentives. Many of the world's overexploited fisheries are in the developing world, so with South Africa (SA) straddling the developed–developing divide, it is of particular interest to examine how Marine Stewardship Council (MSC) certification has fared in the country.

The South African trawl fishery for hake, for which landed values exceed those for the rest of the country's fisheries combined, is currently the only MSC certified fishery in Africa. This paper reports on some local perspectives regarding this certification, as ascertained from discussions with local scientists (particularly from the Department of Agriculture, Forestry and Fisheries, which carries management responsibility for this fishery) and members of the fishing industry, as well as perspectives of the author who has been heavily involved in the quantitative scientific assessments of this hake resource.

The paper first summarises the history of the MSC certification of the hake trawl fishery, and then proceeds to discuss perceived positive and negative associated aspects.

2. The hake fishery and its certification history

The hake caught off South Africa actually comprises two species, the shallow-water hake *Merluccius capensis* and deep-water hake *Merluccius paradoxus*. Over recent decades, the annual Total Allowance Catch (TAC) has generally not differed greatly from 150 thousand tonnes.

Lallemand et al. (2016) describe social and economic aspects of the fishery. In brief, the fishery provides direct employment for over 8000 persons, which nears 40% of the total direct employment in the SA fishing industry as a whole. Approaching 70% of the product is exported, resulting in an annual revenue approaching USD 200 million. Importantly, Lallemand et al. emphasise the current economic importance to the industry of access to northern European markets to sell high-price products. This access is dependent on MSC certification, without which many buyers would decline to purchase these hake. Should MSC certification not continue, Lallemand et al. estimate a loss of some 40% of the five-year Net Present Value of the fishery, and report estimates by others of direct and indirect employment losses ranging between 5000 and 10000. Clearly, continuation of MSC certification is of great importance to the hake trawl industry at this time.

The first MSC certification of the hake trawl fishery was achieved in 2004. The associated evaluation (in particular as regards resource status) was fairly straightforward, particularly as at the time the two hake species were assessed as one. With the two species aggregated, although hake was estimated to be below its MSY biomass

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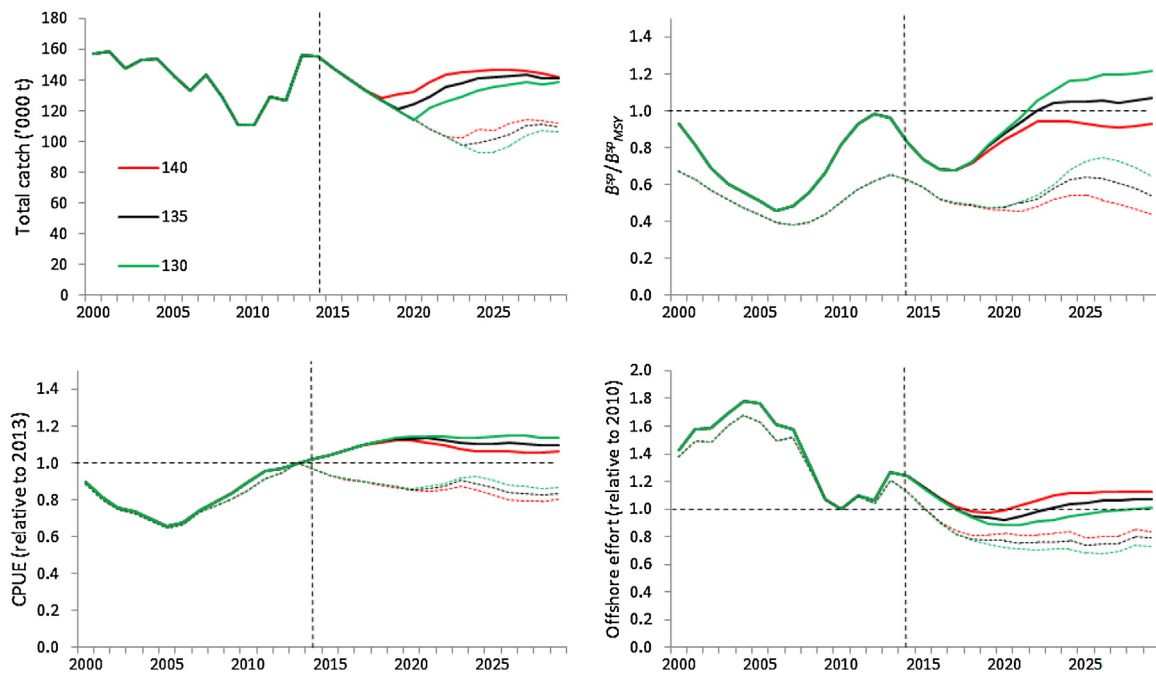


Fig. 1. Medians (full lines) and lower 2.5%iles (dotted lines) for the annual total hake allowable catch (TAC—top row, LHS), *M. paradoxus* spawning biomass (relative to B_{MSY} —top row, RHS), CPUE (relative to 2013, bottom row, LHS) and effort (relative to 2010, bottom row, RHS) for the reference set of operating models used for testing Candidate MPs for the 2014 hake MP revision process (Rademeyer and Butterworth, 2014). Results are shown for three Candidate MPs: CMP1₁₄₀, CMP1₁₃₅ and CMP1₁₃₀ (corresponding to anticipated average TACs over 2015–2024 of 140,000 t, 135,000 t and 130,000 t respectively). The horizontal dashed lines correspond to *M. paradoxus* at B_{MSY} . Projections start to the right of the vertical dashed lines.

level (B_{MSY}), it was acknowledged to be well advanced along an acceptable recovery trajectory.

However, re-certification in 2010 saw this picture change substantially. In 2006, the hake assessment had been successfully disaggregated by species for the first time, with results that showed the shallow-water species above but the deep-water species well below the biomass levels at which MSY is achieved (B_{MSY}). Furthermore CPUE had dropped appreciably over the immediately preceding years, greatly reducing the industry's profit margins, and concerns had also arisen given estimates of the number of seabirds killed during fishing operations.

This re-certification exercise nevertheless concluded with a successful outcome. The main reasons were the implementation of a recovery plan (in the form of a Management Procedure (MP) (Butterworth, 2007; Rademeyer et al., 2008)) which was projected to return the deep-water hake biomass to its MSY level by 2016 (Rademeyer, 2012), widespread introduction of tori lines which achieved a seabird kill reduction estimated to have exceeded 90%, and the initiation of an experiment to investigate the impact of trawling for hake on the habitat.

The 2015 re-certification proved more challenging still. With the northward shift in the European market for South African hake following the 2008 financial crisis, with concurrent increasing insistence on MSC certification, for the first time the industry saw clearly how exposed it was, with thousands of jobs at risk if re-certification was refused. Although ultimately this re-certification was again achieved, this accomplishment was rendered more difficult given some negative resource signals as well as some government administrative problems.

Following some good recruitment, the deep-water hake had reached B_{MSY} in 2013 rather than 2016 as projected at the time of the previous re-certification, but subsequent poor recruitment had been detected, and even given anticipated TAC reductions in terms of an updated MP, a short term reduction in biomass was projected for the next few years with a return to B_{MSY} only after

2020. Furthermore, there were problems in maintaining the certification requirement of an observer programme in the fishery, and in the lack of availability for a number of years of the country's main research vessel to conduct the key trawl surveys that provided the estimates hake abundance required for TAC computations (with an industry fishing vessel having to substitute, though without any inter-vessel calibration exercise proving possible). However, both of these last two problems were matters for government to rectify, and outside the control of the industry seeking re-certification.

3. The positives

MSC certification has brought further (though limited) market penetration, and has incentivised tori line use which has led to appreciable reductions in bird kills.

However, perhaps the greatest benefit has been the enhanced attention now given to scientific considerations and inputs.

- The results from scientific analyses (assessments and the MP development process) are now taken more seriously by both industry stakeholders and government officials.
- The implications of loss of MSC certification provides a potential “stick” to “encourage” both government and industry to take steps to improve (or at least maintain) good management of the fishery.
- Exposure to the process has “conscientised” the industry to sustainability considerations. A tangible outcome from this has been the formation by leading companies in the industry and the ENGOs Birdlife and WWF of the Responsible Fisheries Alliance, which aims to work together to ensure that healthy marine ecosystems underpin a robust seafood industry in southern Africa.
- Programmes to educate skippers and crew on these sustainability considerations have been initiated.

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