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Animal Welfare in Commercial Fishing

Market Perspective on Catch
Welfare

Linda Wood – 26th October 24

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Overview of M&S Seafood Supply

Seafood contributes £280 million in sales to M&S annually, across chilled, fresh deli and frozen. We source roughly 50,000 tonnes/year comprising 43 species from 30 countries. We're proud to be able to say 100% of the seafood we sell is responsibly sourced.

Farmed fish & shellfish



11
Countries



15
Species



6
Farming
Methods

Wild caught fish & shellfish



20
Countries



28
Species



13
Fishing
Methods



Our Forever Fish Strategy

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M&S FOREVER FISH STRATEGY



Forever Fish is a holistic responsible fish sourcing programme covering all M&S Seafood. It provides a simple and recognisable 'seal of approval' for fish products, giving customers the confidence that they are choosing sustainable, traceable fish and overcoming growing consumer concern about fish sustainability. It is one simple message, wholly controlled by M&S, consistent across all wild and farmed fish and gives us the opportunity to tell our stories to customers and stakeholders.

Established in 2011, it goes beyond any legal or NGO-led programmes to cover :

ENVIRONMENT

We protect the environment, from ocean plastic and ghost fishing gear, to safeguarding fish stocks, marine protected areas and endangered and threatened species.

PEOPLE & ETHICS

We protect human rights at sea across the globe, ensuring people can lead a dignified life, free from abuse and violation. We safeguard livelihoods in coastal communities.

FISH WELFARE

We have leading standards for our farmed fish from production to harvesting and slaughter. We also work with wild-caught fisheries to ensure approaches that protect fish welfare.

CLIMATE CHANGE

We actively collect information on climate change impact from our suppliers and are evolving our sourcing standards to deliver low impact wild-caught and farmed fish.

LEGAL

We ensure all seafood we sell has been legally caught. Our standards provide full traceability and ensure we don't work with illegal, unreported and unregulated suppliers.

MARKETING

Forever Fish provides the opportunity to market M&S fish in a compelling way. We propose supporting the Big Beach Clean Up to drive awareness.

Supported by WWF Partnership since 2004

What does this deliver?

Security of supply

Confidence that we'll still be able to source fish today and tomorrow

Protects reputation

Protects M&S seafood from increasing scrutiny

Opportunities for innovation

Involvement in FIPs and specific initiatives allow us to source fish that we otherwise wouldn't be able to and create points of difference for customers.

Customer confidence

Provides clear and simple reassurance about widespread sustainability concerns

M&S position on animal welfare

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We take animal welfare very seriously and have over the last year made it a priority to improve the welfare of the seafood we source

RSPCA

As a UK retailer, we sell the largest range of RSPCA Assured products. The logo currently appears on our on our Scottish farmed salmon, Scottish farmed organic salmon, Scottish farmed trout, Oakham Gold chicken, fresh eggs, pork and milk. We have plans for future development of RSPCA standards in new species of seafood so watch this space....



M&S policies on seafood welfare

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We have developed clear policies which state our expectations around seafood welfare...

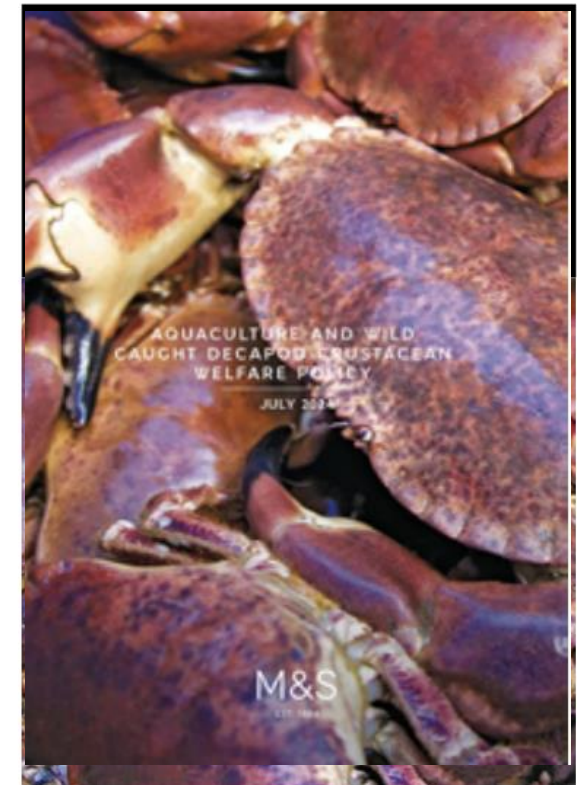
Forever Fish sourcing policy

At M&S, we pride ourselves on our leading responsible sourcing standards in UK retail, with our Forever Fish sourcing policy at the heart of them. We have spent several months reviewing our policy in collaboration with WWF and our supply partners to clarify and strengthen our position on where M&S differentiates on our sourcing standards as well as updating the policy where practices have progressed.



Decapod policy

This year we published our policy on '[M&S Aquaculture and Wild Capture Decapod Welfare](#)' outlining our overall approach to our sourcing as well as specific commitments and implementation of our welfare and responsible sourcing policies.



Our commitments to improving seafood welfare

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Improve the welfare of all seafood we source, wild or farmed, fish, shellfish/decapod crustacean or mollusc through working with industry, scientists and innovation companies to address the current challenges/gaps preventing the optimal handling and management of these species and improving animal welfare.

COMMITMENTS TO DECAPOD CRUSTACEAN WELFARE

M&S commits to the following:

1. To never sell any live decapod crustaceans in our business.
2. Reducing the negative effects of capture methods on decapod crustacean welfare through adapting equipment, fishing and handling practices.

How we measure seafood welfare

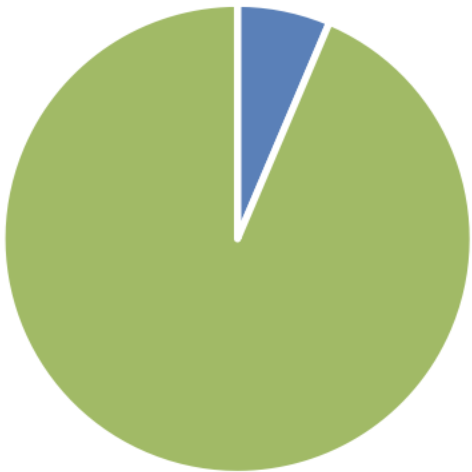


and we measure the performance against these requirements

Welfare outcome measures (WOMs)

As a business, M&S is increasingly using WOMs to assess if an animal has had a happy life, rather than stipulating how it should be reared. For example, in pigs this could mean looking at the percentage of bitten tails or for poultry, the mortality rate of birds in transport. For fish, we currently have WOMs for salmon, trout and some warm water prawn suppliers. We are now working with our suppliers to roll this out across all farmed species over the rest of this year.

Average Condition Factor per cage	% of fish with a skin condition at harvest	% of fish with sea lice damage at harvest	% of fish with eye damage/loss at harvest	% of harvests exceeding 14 hours closed valve wellboat transport	% of fish dead on arrival at killing station
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■ Mutilation present ■ Free from mutilation

The challenge ahead

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Farm	Scientific name (common name)	Stun method	% stun	Kill Method
Wild	Pleoticus muelleri (Argentinian Red Shrimp)	No stun	0%	Thermal shock in salted ice water
Wild	Cancer pagurus (Crab/Brown crab)	Electrical stun	100%	Cooking at factory
Wild	Clupea harengus (Herring)	No stun	0%	Asphyxiation in hold
Wild	Engraulis Encrasicolus (Anchovy)	No stun	0%	Asphyxiation on deck
Wild	Gadus Morhua (Cod)	Electrical stun/Priest/No stun	Max 27% electrical stun (not all vessels), 20% also using priest, 73% no stun	Bleed/Asphyxiation on deck/net/hold/Gutted alive
Wild	Gadus Morhua Roe (Cod Roe)	No stun	0%	Gutted alive
Wild	Homarus americanus (Canadian Lobster)	Electrical stun	100%	Cooking at factory
Wild	Illex illecebrosus (Northern shortfin squid)	No stun	0%	Asphyxiation in net
Wild	Katsuwomas Pelamis (Skipjack Tuna)	No stun	0%	Asphyxiation on deck
Wild	Limanda aspera (Yellowfin sole)	No stun	0%	Gutted alive
Wild	Lophius sp. (Monkfish)	No stun	0%	Asphyxiation in net
Wild	Melanogrammus Aeglefinus (Haddock)	Electrical stun/Priest/No stun	Max 26% electrical stun (not all vessels), 14% electrical & priest, 4% priest, 70% no stun	Bleed/Asphyxiation on deck/net/hold/Gutted alive
Wild	Merluccius capensis & M. paradoxus (Hake)	No stun	0%	Asphyxiation in net
Wild	Merluccius merluccius (European hake)	No stun	0%	Asphyxiation on deck
Wild	Microstomus kitt (Lemon sole)	No stun	0%	Asphyxiation in net/deck/hold/Gutted alive
Wild	Nototolarus sloanii (arrow squid)	No stun	0%	Asphyxiation in net
Wild	Oncorhynchus nerka (Red salmon/Sockeye Salmon)	No stun	0%	Asphyxiation in net
Wild	Pandalus borealis (C&P shrimp/Coldwater prawn)	No stun	0%	Asphyxiation in hold/net/deck
Wild	Panulirus cygnus (Australian rock lobster)	Electrical stun	100%	Cooking at factory
Wild	Placopecten magellanicus (Atlantic Scallop)	No stun	0%	Shucked alive/Asphyxiation in net/hold
Wild	Pleuronectes platessa (Plaice)	No stun	0%	Gutted alive
Wild	Procambarus Clarkii (Crayfish)	Thermal shock in ice slurry	100%	Cooking at factory
Wild	Sardina pilchardus (Sardines)	No stun	0%	Asphyxiation in hold/net/deck
Wild	Scomber Scrombrus (Mackerel)	No stun	11% thermal shock kill	Thermal shock in salted ice water/Asphyxiation in net/hold
Wild	Solea solea (Dover sole)	No stun	0%	Asphyxiation on deck/net/hold
Wild	Theragra chalcogramma (Pollock)	Priest/no stun	39% stunned with a priest & bled	Bleed/Asphyxiation on deck/hold
Wild	Thunnus alalunga (Albacore tuna)	Priest/no stun	18% stunned with a priest & bled	Bleed/Asphyxiation on deck
Wild	Thunnus albacares (Yellowfin tuna)	Priest	100%	Stunned with a priest and bled
Wild	Zygochlamys patagonica (Queen scallop/Patagonian scallop)	Thermal shock in fresh ice water/no stun	44% thermal shock	Shucked alive/Asphyxiation in hold
Wild	Nephrops norvegicus (Langoustine/Scampi)	No stun	0%	Asphyxiation in hold/net/deck

Wild Capture

- 10% - Electrically Stunned on land – Crab, Lobster, Rock Lobster
- 20% - Some electrical stunning on board – Haddock, Cod, Tuna
- 70% - No stun in place

Using Innovation to address the issues – humane stunning

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Electrical stunning

For fish, both wild and farmed, the key animal welfare challenges are around crowding (whether pre harvest or in a fishing net), handling, storage and dispatching. For the latter, we are actively driving projects across many of our farmed and wild fish and shellfish species to address the need for a humane method of stun prior to dispatch.

In March, we partnered with Optimar to host 'The Animal Welfare Week' in Ålesund, Norway alongside our key suppliers, FAI Farms and SafetyNet Technologies. The event sought to understand more about the animal experiences during capture, harvest, handling and storage, and how these stresses can be mitigated. It was supported by leading scientists sharing the latest findings of studies conducted on a variety of species.



Progress so far in Crustaceans

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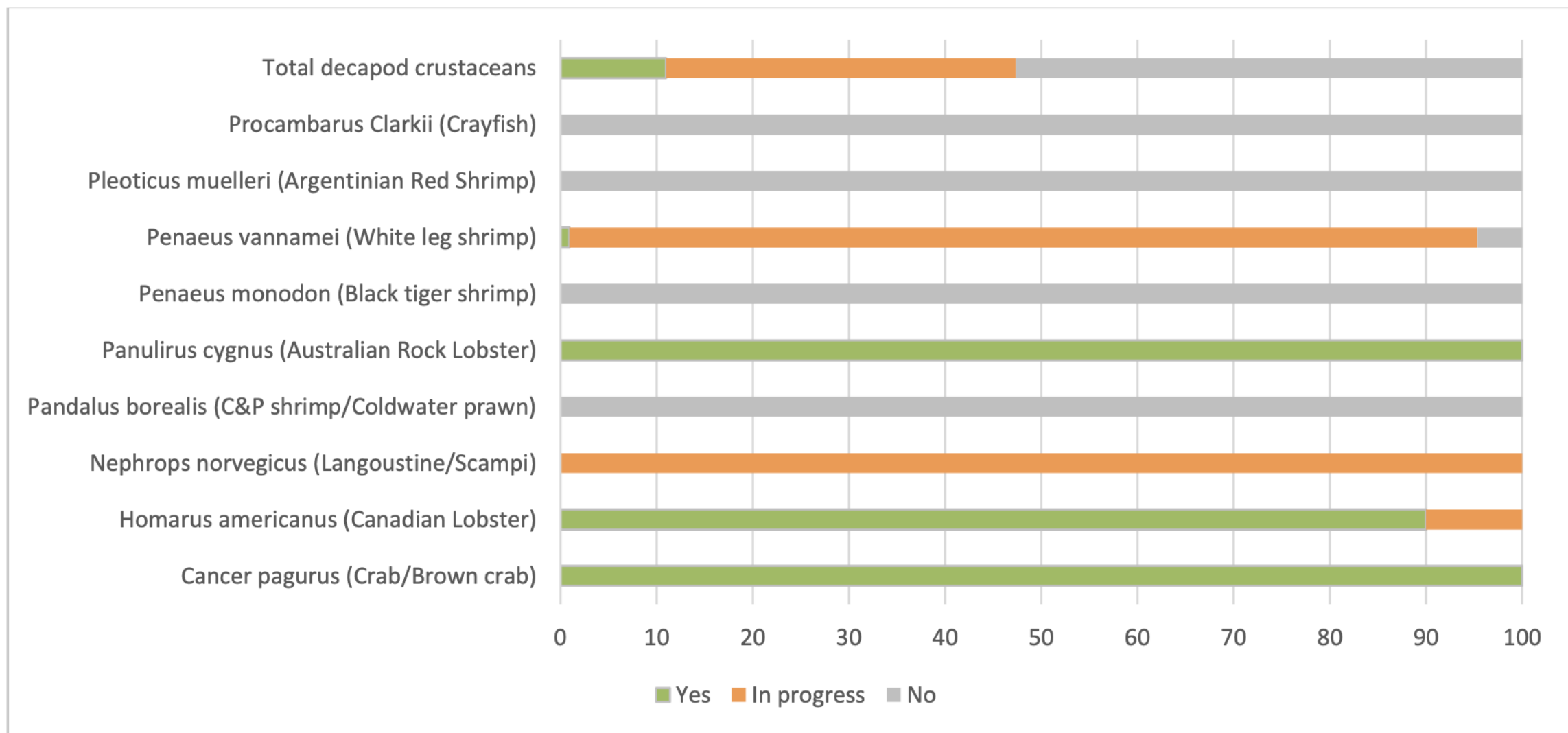


Figure 2. Electrical Stun, Progress to date April 2023 - July 2024

Target for Crustaceans

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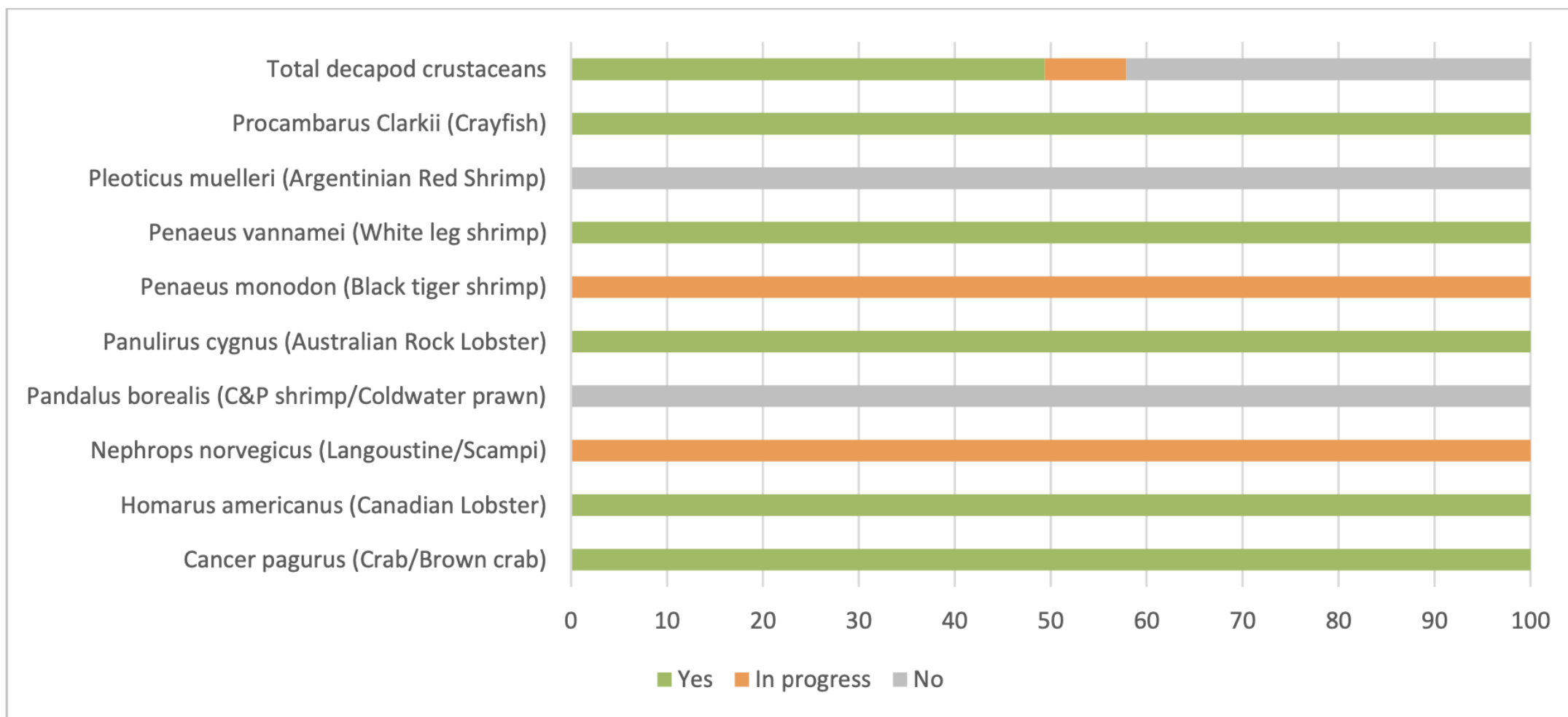
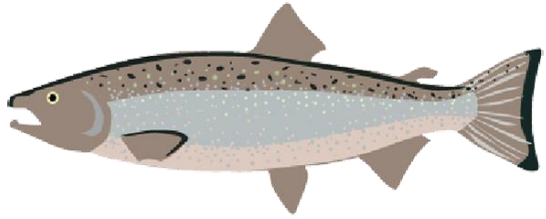


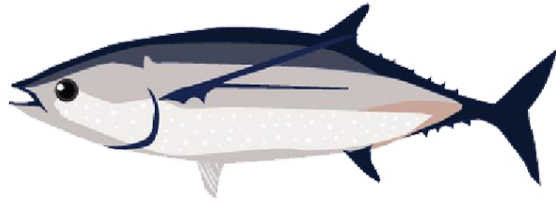
Figure 3. Electrical Stun, Projected Implementation by 2025/2026 (based on 2023/2024 volumes)

Current live projects

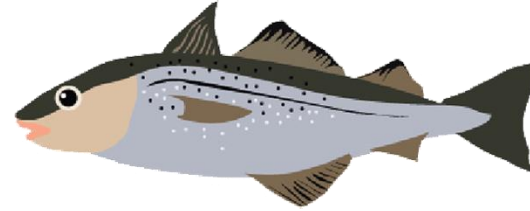
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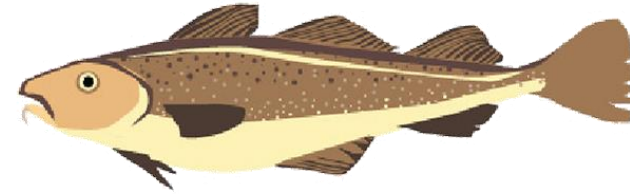
Atlantic Salmon



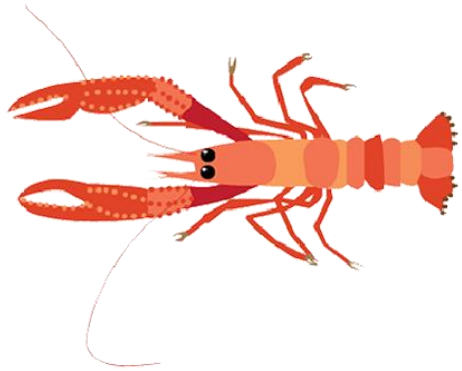
Skipjack Tuna



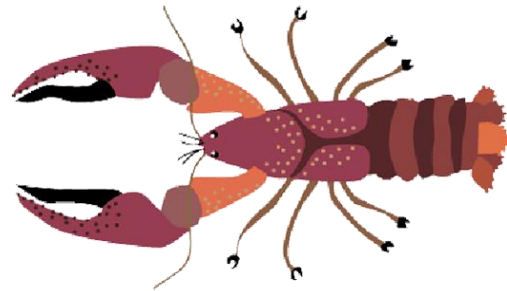
Haddock



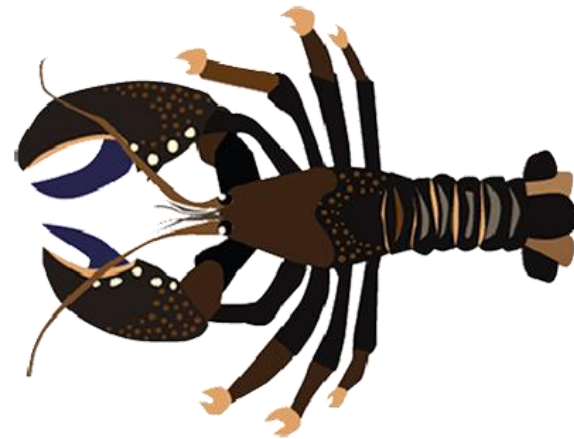
Atlantic Cod



Langoustine (Nephrops)



Crayfish



Canadian Lobsters.



Brown Crab

Bringing everyone together

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Optimar Animal Welfare Week in Ålesund, Norway - it was a great success!

**KICK-OFF
CONFERENCE**

**Catch
Welfare**
PLATFORM



NOV 20 - 22 2023 • BERGEN • NORWAY

Hotel Terminus - Zander Kaaes gate 6

Industry Collaboration



Shellfish
Association of Great Britain



Department of
Agriculture, Environment
and Rural Affairs



Final comments & reasons to be positive

- Our customers expect it from us
- We already have many red lines
- Good seafood welfare is not just Humane Slaughter
- We take a science-based approach without holding back improvements
- We have found progress can be made quickly with the right collaborations
- Need to make improvements before legislation
- We can learn from other animals
- Funding of Innovation is key

