

(Un)sustainability in the Swiss fish market

Sustainability of fish as a food is a highly complex issue, especially in a global market with wildly varying measures and priorities in fish production and harvesting. Urs Baumgartner, environmental scientist, and Dr Elisabeth Bürgi Bonanomi, legal scientist and expert in sustainable trade regulation, tried to get a clearer picture of sustainability in the fish market of Switzerland, which imports almost all its fish. They discovered an urgent need for quality assurance by the state, provided for by nuanced frameworks for public procurement and trade.

As the world's population grows rapidly and becomes increasingly urbanised, it is difficult to argue against the need for sustainable food production. However, a sustainable food source suffers a fundamental challenge: a clear definition of what 'sustainable' means. As consumers, we may have an idea – possibly an ideal – of 'sustainability', and we may follow retail guides and information to make what we consider *ethical* decisions when purchasing. But what if those guides were little more than marketing?

Urs Baumgartner is an environmental manager with *ekolibrium*, a team of experts in sustainable development, and is therefore well-acquainted with the conundrum of striving for something

that differs in definition and scale across various sectors. He is also acutely aware of the complexities behind sustainability in terms of issues such as regulation, ethics and the diversity of stakeholders involved, and their often discordant priorities and agendas. A classic case in point is in seemingly ordered and tranquil Switzerland.

SOMETHING FISHY ABOUT 'SUSTAINABILITY'

Like those in other developed countries in Europe, the Swiss are evolving ethical consumers and are increasingly purchasing with an eye on minimising their impact on the environment. They want to know where their food comes from and whether it is responsibly sourced, processed, and sustainable. Major retailers ensure that food labelling meets these new standards. But what defines something as sustainable, and who sets the standards? These are issues that Baumgartner set out to examine together with Dr Elisabeth Bürgi Bonanomi, a senior lecturer in trade law and sustainability at the University of Bern. They chose a sector close to the heart – and stomachs – of the Swiss: fish.

Switzerland is landlocked, and so depends heavily on imports to meet its domestic needs for fish: 96% of all fish consumed in Switzerland is imported. Given the growing demand for ethical food choices, it would be fair for outsiders to assume that a country like Switzerland would have the necessary regulatory frameworks

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The vast majority of all fish consumed in Switzerland is imported.



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in place to ensure consumers knew whether the fish they consumed was sustainable, especially if most of it came from other countries (some of which may have questionable priorities in aquatic agriculture and fisheries). Key to this would be clear and mutually agreed guidelines on differentiating between sustainable and unsustainable fish. It increasingly seems that these guidelines are not in place, however. So, Baumgartner and Bürgi Bonanomi have sought to provide some measure of clarity.

In a combination of interviews with specialist stakeholders in the Swiss fish market, an online survey, and detailed data analysis, the researchers examined how 'sustainable fish' is defined, what measures the Swiss private sector uses to encourage the consumption of sustainable fish, and which key elements are considered for fish product differentiation to meet sustainability criteria. Also, because they were examining the Swiss fish market through the perspective of international trade laws, they wanted to investigate

what sort of differentiation between sustainable and non-sustainable fish would be in keeping with the principles of non-discrimination and proportionality under World Trade Organization law. This is a crucial point because states — unlike private actors — must adhere to certain principles when interfering in product differentiation. What they discovered was concerning.

SUSTAINABILITY'S LABEL JUNGLE

The experts they interviewed and those invited to participate in the survey covered much of the Swiss fish market, including local producers, trade representatives, retailers, restaurant and food service (RFS) providers, quality-management specialists, labelling organisations and associated NGOs. One of the major points of concern was the perceived merits of 'sustainable' fish. While retailers acknowledged the importance of sustainability for customers, those in the RFS sector said it was less important; price, not sustainability, was the determining demand factor. There was also the practical issue of labelling something served on a plate, and the fact that the more exotic fish usually served in, say, gourmet restaurants were less likely to be sustainably sourced. Generally, the smaller the range of fish offered, the more likely they would be sustainable. In short, the Swiss RFS sector was a big challenge for sustainability.

Another concern the research confirmed was the lack of clarity on what constituted 'sustainable'. Major retailers and other key stakeholders pointed to the WWF seafood guides, which are meant to help consumers make the right buying decision. The guides separate fish products into four categories: green for 'recommended', orange for 'acceptable', red for 'avoid', and blue for 'recommended labels'. The WWF recommended labels include either Marine Stewardship Council (MSC) certification for wild-caught fish, or Aquaculture Stewardship Council (ASC) and 'organic' certification for reared fish. There is no clear definition between what is sustainable and what is not. The result is a plethora of different labelling

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on packaging – a 'label jungle' that consumers must negotiate, risking what Baumgartner describes as 'sustainability fatigue'. It has also meant that claims of 'sustainability' on fish products, couched in various phrasing, can't be challenged.

Furthermore, there is the labelling of fish that suggests sustainability. For example, locally-produced fish that is proudly marketed as such can carry the suggestion it is sustainable, the



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There remains a worrying lack of clarity over what is meant by the label 'sustainable', and without guidance from the state this confusion is likely to persist.



Consumers are increasingly keen to know where their food comes from, and whether it is sustainably sourced.

argument being that with shorter value chains, its eco-footprint is smaller and that Swiss agricultural standards would be higher than those in, say, Vietnam. However, due to climate conditions, fish production requires more energy input compared to tropical regions. Switzerland has no national aquaculture framework, and regulations vary throughout the country. Only very few producers seek private eco-certification. As a consequence, some fish produced in Switzerland have a larger eco-footprint than comparable products from Vietnam.

MORE THAN JUST ENVIRONMENTAL

Another concern that emerged from Baumgartner and Bürgi Bonanomi's research was the limited scope of the definition of sustainability. Respondents pointed to the emphasis on *environmental* sustainability attached to the MSC and ASC certifications, or 'ecolabels'. These failed to include measures of social and financial sustainability. A quirk of aquaculture is that predatory fish species such as salmon, seabream, and yellowtail require more food-grade fish to feed than they produce; they are therefore difficult to farm sustainably from a resource perspective. Also, fish produced by bottom-trawling can carry an MSC label even though the process is environmentally destructive. Generally, the integration of animal welfare remains poor. In short, the interviews and surveys identified flaws in sustainability claims and a lack of transparency in current sustainability agendas for fish.



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Furthermore, even when analysing the Swiss fish market through a limited sustainability lens, only around 40% of consumed products may be considered sustainable. This figure is even more severe within the RFS sector, where sustainability has a very low priority.

ENTER THE STATE

Baumgartner and Bürgi Bonanomi's insights are impossible to ignore, and the implications deserve serious consideration, especially by Swiss and other national regulators. If there is to be any clarity on sustainability in the Swiss fish market, the state must play a pivotal role, especially as the market is primarily stocked by international suppliers. Quality assurance and clarification on issues of sustainability can be done by providing for more nuanced frameworks in public procurement and trade policy. But where to start?

Switzerland could look at organic regulations for aquaculture such as those established by the EU. In the EU, Switzerland, and many other countries, state regulations define what criteria organic labelled products need to meet before entering the market. A similar framework could be used for 'sustainable products', with states regulating under which conditions products may be marketed as 'sustainable'. With inputs from a broad range of stakeholders such as those interviewed in the research, this could help define sustainable production regulations that would mandate binding requirements for all producers marketing their products as sustainable. This would help draw the line between what is sustainable and unsustainable in the fish market more transparently and holistically. It would also level the playing field in terms of qualifications, thereby avoiding any possible discrimination towards vulnerable producers; boost consumer confidence in, and support for, sustainable fish produce; and provide a more explicit framework for national guidelines to bring more quality in the current patchwork of private labels

and initiatives. In addition, with a clear definition of 'sustainable production', states could tie public incentives to efforts that foster its adoption.

It's not going to be easy. For example, earlier this year, Switzerland had to vote on the first trade agreement that made tariff reductions for imports contingent on compliance with sustainability principles. In that case, it was an agreement with Indonesia over one of its biggest exports: palm oil, a highly controversial product with shallow claims of sustainability. If the agreement should deliver on its objective, the state will need to take a stronger role and can't simply rely on those claims made by private actors. Complementary action by the state is needed to incentivise market access for sustainably produced products and to get the prices right. In the words of Bürgi Bonanomi: 'Sustainability doesn't come free.'

Behind the Research



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Research Objectives

Urs Baumgartner and Elisabeth Bürgi Bonanomi research sustainability in the Swiss fish market.

Detail

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Bio

Urs Baumgartner is a multidisciplinary environmental expert with many years of practical experience working at various levels in international development. Urs has gained deep insight into fish production, trade, and certification through coordinating improvement projects, research, and evaluating impacts from different perspectives. He is the founder of ekolibrum.

Dr Elisabeth Bürgi Bonanomi teaches law and sustainability at the Centre for Development and Environment (CDE) and the law faculty of the University of Bern. Her research expertise is in trade and sustainability, illicit financial flows in commodity trade, due diligence governance of transnational business enterprises, and more.

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Personal Response

Your research highlights multiple issues with the clarification of sustainability among key stakeholders in the Swiss fish market: what do you think deserves the most urgent attention?

/// To make claims regarding sustainable products accountable, there needs to be a mutual understanding among stakeholders of what 'sustainable' means. In the current landscape, there is a big regulatory void that leaves too much room for actors to market whatever they feel like, even under a false pretence. To change this, the state must take a stronger role in defining what 'sustainable' means, complement private labels and initiatives, and assume its responsibility to implement measures that contribute to sustainable development. When defining 'sustainability', all stakeholders need to be involved, and access and transparency are key to success. //



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