



PROJECT PROFILE

Collaboration and Innovation to Advance Sustainable Seafood

Monterey Bay Aquarium Seafood Watch

PROJECT NAME

Seafood Watch

CLIENT

Monterey Bay Aquarium Seafood Watch

PRIME CONTRACTOR

Resonance Global

COUNTRIES

Vietnam, India, Indonesia, Myanmar, Philippines, Thailand, and United States

TIME PERIOD

Dec. 2017 – Present

Challenge

Seafood is a critical food source for nearly three billion people. It uses less resources and space than land-based meat production, including chicken, pork, and beef, and it provides livelihoods for coastal communities around the world. As overfishing decimates wild fish populations, many countries are turning to aquaculture to meet the growing demand for fish protein. The amount of farmed seafood has grown exponentially to meet the growing demand for seafood overall: Aquaculture represents 53 percent of all fish consumed and 9 percent of the world's animal protein consumption. However, the aquaculture sector continues to face serious sustainability challenges including disease outbreaks, water pollution, use of harmful antibiotics, and reliance on feed from wild fisheries.

To limit the environmental and social harm caused by aquaculture, many NGOs and companies have created certification and rating schemes to improve sustainability of production and provide assurance to customers and buyers that farmed seafood is healthy and sustainable. [Seafood Watch](#), a program of the Monterey Bay Aquarium, rates seafood products based on their sustainability

and provides purchasing recommendations to consumers. Seafood Watch and other seafood rating organizations have inspired more than 85 percent of North America's seafood retailers and top foodservice companies to commit to sourcing sustainable seafood.

However, the demand for responsibly produced seafood vastly outstrips supply. Barriers include local resistance from fishers and aquaculture operations to certification programs, high costs to implement sustainability measures, and a focus on the sustainability of individual farms. Many aquaculture products, such as shrimp, are produced by small farmers in Asia, which is responsible for 90 percent of the world's aquaculture production. These small farmers tend to lack centralized organization (i.e., cooperatives or associations) and have limited capacity and resources to meet certification program standards and improve farm practices.

Solution

Since 2017, Seafood Watch has engaged Resonance as a strategic advisor to develop and implement its global aquaculture and fisheries improvement strategy, with a special focus on Asia. This includes designing and implementing partnerships and innovative collaboration models between seafood supply chain companies, producers, and governments.

- **Business Model and Strategy Development.** Resonance develops strategies and business models for aquaculture improvement projects that Seafood Watch convenes with its business partners, processors and producers in source countries. We have developed market and partnership strategies, organizational structure plans, and business models for the Vietnam Sustainable Shrimp Alliance, the Asian Seafood Improvement Collaborative, and a shrimp improvement project in Andhra Pradesh, India.
- **Partnership Assurance Model.** Resonance has jointly led the design, execution, and implementation of a new area-based approach to aquaculture improvement: [The Partnership Assurance Model](#). Resonance co-designed the model with Seafood Watch, convened on-the-ground partnerships with seafood companies in India and Vietnam, and facilitated workshops to refine the idea with key international and domestic players.
- **Governance and Sustainability Assessments.** Resonance conducts and produces research for Seafood Watch on opportunities for sustainable seafood, potential new private sector collaborations, aquaculture supply chains, and fishery governance regimes.
- **Shared Value Partnership Development.** Resonance is identifying and developing partnerships between Seafood Watch, governments, and USAID, to advance sustainable fisheries in Asia.

Key Results

- Resonance designed a business model for the [Asian Seafood Improvement Collaborative \(ASIC\)](#), an alliance of seafood buyers, processors, farmer groups, NGOs, and governments that coordinates investments in sustainable aquaculture across Southeast Asia. While participants and donor agencies were excited about ASIC, the Alliance did not have a strategy for generating revenue and ensuring self-sufficiency and sustainability. Resonance developed a new business model – drawing on 25 interviews and secondary data review – which ASIC reviewed, accepted, and implemented.
- Building on the success of and external interest in ASIC, Resonance assessed the feasibility of scaling this new aquaculture improvement partnership model in other countries and aquaculture sectors. From this assessment, Resonance developed the concept of the Partnership Assurance Model, focusing on shrimp aquaculture to start. The Partnership Assurance Model involves collaboration and co-investment from industry and government across a value chain to help aquaculture operations in a particular production area meet global social, economic, and environmental sustainability standards. It deploys more efficient and cost effective fit-for-purpose verification practices, defined by seafood buyers and supported by local civil society and government.
- Two Partnership Assurance Model projects have since been developed in two of the largest shrimp-producing countries and regions in the world, in Ca Mau province, Vietnam, and [Andhra Pradesh, India](#).
- To implement the Partnership Assurance Model in Ca Mau province, Vietnam, Resonance worked with Seafood Watch and its buyer partners to [establish the Vietnam Sustainable Shrimp Alliance \(VSA\)](#). Composed of shrimp processors, buyers, government agencies and committees, input suppliers, and local NGOs, the VSA coordinates and implements the Partnership Assurance Model.
- To start, the VSA, similar to ASIC, was created with donor funding and lacked a long-term business strategy. Resonance assessed potential business models and facilitated a workshop to collectively review and refine an appropriate and promising model. The VSA has adopted this new business model, and the private sector members have committed \$270,000 in initial funding. Resonance is developing a code of conduct for the Alliance and conducting a return on investment analysis for one of the companies that founded the Alliance.

- Resonance researched, analyzed, wrote, and managed the production of fisheries and aquaculture governance profiles for five countries in Southeast Asia (Indonesia, Thailand, Vietnam, Myanmar, and the Philippines). This work included assessing each country's fisheries and aquaculture policies, governance frameworks, trade data, and production statistics. We created these profiles to support the Southeast Asia Fisheries Initiative, a program led by Seafood Watch and the Carnegie Endowment for International Peace to encourage governance reforms and sustainable fisheries and aquaculture development across Southeast Asia.
- Resonance developed a new partnership between Seafood Watch, Government of the Philippines, the Philippine Association of Crab Processors Inc., Chicken of the Sea, and the USAID/Philippines Fish Right program to elevate the sustainability of the blue swimming crab fishery in the Visayan Sea to a Seafood Watch "Good Alternative" rating by 2022.