Conclusions ↘ 2025

Global **Sustainable**
Seafood **Galicia** Forum

2025 Edition

III Global Sustainable Seafood Galicia Forum

Under the focus ***Measuring Sustainability***, the third edition of the Galicia Forum on Global Sustainability of Seafood Products (GSSG) was held in Vigo in May 2025, drawing the following **conclusions**:

- Measuring sustainability is essential for achieving the **common goal**: without it, there will be no progress.

- The sector must act strategically, choosing indicators that drive greater efficiency. **Without profitability,** there is no **capacity** for **investment**; and without investment, **progress** cannot happen.

- **Corporate efficiency** must be **aligned** with a **positive impact on society and the environment**, through initiatives that advance to both goals.

- Science and industry must align their priorities to **identify and measure the factors** that drive both economic growth and ocean health.

21 Speakers → **+300** Attendees → **7** Sessions

Speakers ↘

Emma Heslop
Oceanógrafa física COI-UNESCO
Alma Román
Responsable ASC España y Portugal
Pamela Nath
Directora de Sustainable Shrimp Partnership (SSP)
Mike Kraft
Director ejecutivo FISH Standard For Crew y Certified Seafood International (CSI)
Øyvind Ihle
CEO GSSI
Garazi Rodriguez
Responsable Planes Producción y Comercialización APROMAR
Luis García
Director de Sostenibilidad CONXEMAR
María Martínez Herrera
Directora Sostenibilidad ASEDAS
Raquel Arribas
Directora Relaciones Institucionales Kantar Worldpanel
Nuno Cosme
Director Corporativo de Sostenibilidad y RSC Grupo Nueva Pescanova
Damián Martínez
Responsable de Proyectos de Sostenibilidad AECOC

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• **Maintaining a stable supply** and **competitive edge** for seafood products is essential to keeping them relevant to consumers and distribution channels, which is key for restoring consumption levels.

• **Effective regulation** of the seafood sector adds value when it is **thoughtfully designed**, **homogenised** and **standardized** across markets, and **streamlined** to boost competitiveness for the consumer's benefit.

• There must be a **balance between the requirements** of fisheries and aquaculture certification systems and the sector's actual capacity to meet them.

• **The seafood sector must embrace risk to access blue finance**, collaborating with funders and clearly defining investment-worthy projects, projects that deliver both financial returns and positive impact for the planet and people.

• The entire seafood value chain must collaborate in shaping and securing the future of our oceans.

Speakers ↘

Bhakti Annand
Consultora Unidad de Comercio Sostenible NFI/FAO

Íñigo Azqueta
Coordinador del Área Sectorial en ANFACO-CECOPESCA

Elena Ojea
Profesora de Investigación Oportunius CIM-Universidade de Vigo

Fran Saborido
Profesor e investigador Instituto de Investigaciones Marinas-CSIC

Madlen Sobkowiak
Directora MSc Negocios Globales y Sostenibles EDHEC

Rosa Chapela
Directora Gerente CETMAR

Bjarni Herrera
CEO y fundador de Accrona

Shashwat Koirala
Responsable del programa Océano Sostenible para Todos de OCDE

María G. Cabeza
Gerente Responsabilidad Social y Sostenibilidad ABANCA

Antonio Basanta
Asistente de Políticas del Gabinete del Comisario de Pesca y Océanos de la Comisión Europea

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SESSION I. Measuring Sustainability

[IOC UNESCO / Emma Heslop]

• Report on the State of the Oceans 2024 https://unesdoc.unesco.org/ark
• Global Ocean Observation System (GOOS): measures and analyses basic physical and biochemical variables, which are later combined with other regional data, enhancing understanding.
• Fishing Vessel Observation Network (FVON): is the ocean observation community operating from fishing vessels, which allows access to areas and depths that are otherwise not covered.
• From IOC UNESCO, the sector –fishing, aquaculture, and observation centres– is encouraged to participate closely and in a coordinated manner in the definition of indicators and ocean observation to improve knowledge and information services.

SESSION II. The vision of NGOs

[ASC / Alma Román]

• El estándar ASC, desarrollado en colaboración con más de 1.000 stakeholders, se basa en la ciencia para establecer niveles de exigencia superiores a los exigidos por la legislación y los sistemas de gestión de la industria. ASC colabora con los actores de la industria, proporcionando herramientas de medida, trabajando en proyectos de mejora acuícola y exigiendo a los proveedores de piensos certificarse según su estándar.

[SSP/Pamela Nath]

• As a trusted certification label, SSP works to differentiate the origin of its products across markets through ongoing proof of sustainability in action. To achieve this, SSP has partnered with NGOs to evaluate farming according to responsible and sustainable practices. For SSP, the key indicators of sustainability in shrimp farming include responsible water use, a zero-antibiotics policy, monitoring and reducing CO_2 emissions, ensuring fair wages, and protecting vital ecosystems (especially mangroves).

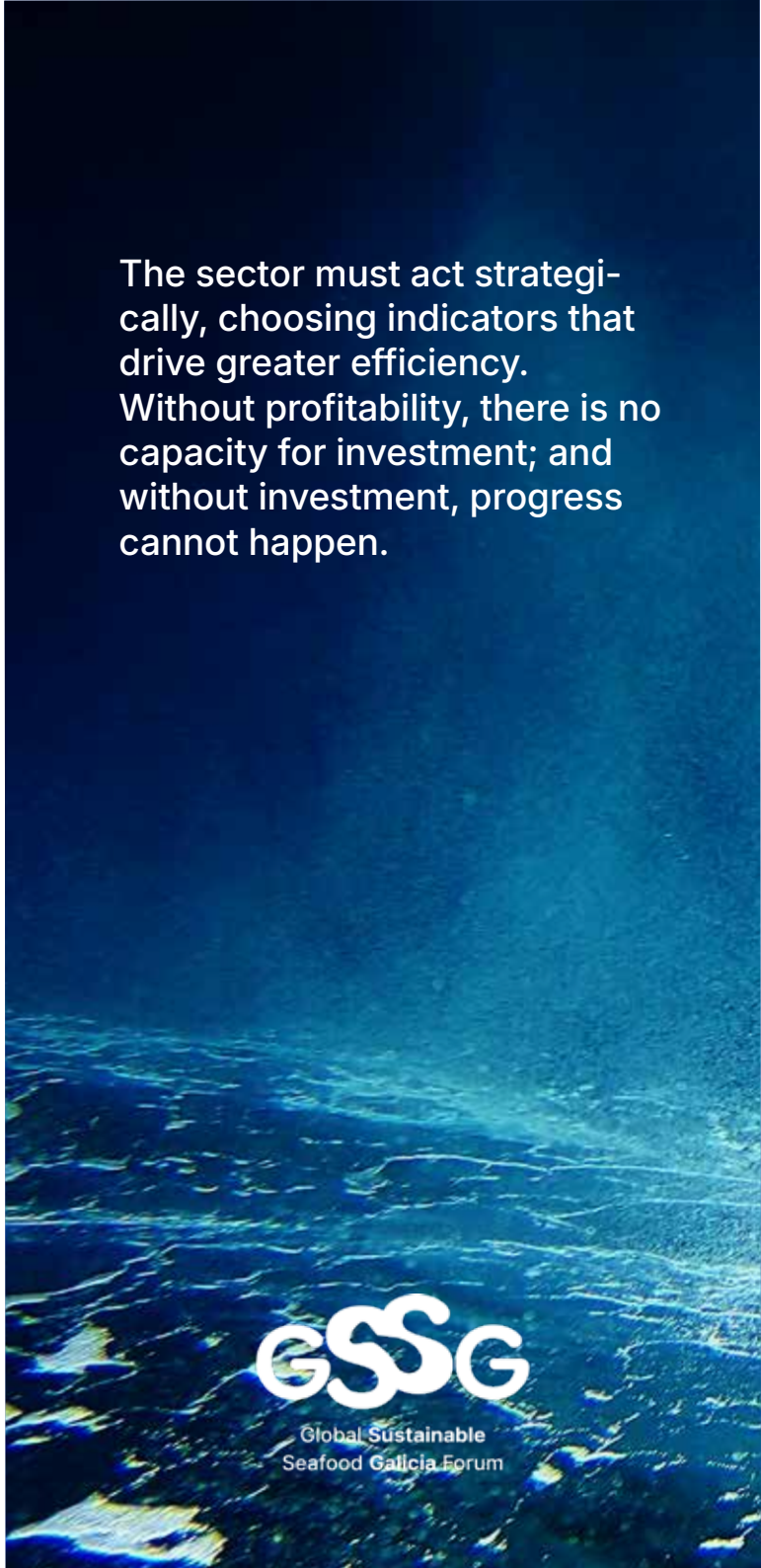
[FISH for Crew-CSI/Mike Kraft]

• FISH for Crew is a labour standard for fishing vessels, developed in alignment with ILO-188 and accredited by SSCI. It provides a framework for evaluating social conditions on board, empowering vessel owners to proactively communicate responsible labour practices and address any identified issues. In parallel, CSI is an environmental standard for fisheries, based on the RFM framework and accredited by GSSI. Its guiding principles are credibility, affordability, global applicability, transparency, and continuous improvement..

>> ROUND TABLE / IDEAS
[Moderator: GSSI / Oyvind Ihle]

• Science, stakeholder engagement, a holistic approach, and the establishment of clear standards are key elements in measuring sustainability. (Alma Román)
• To balance social, environmental, and economic indicators, NGOs and industry must collaborate to define measurable impacts in critical areas such as antibiotic use, water management, and traceability. It is essential to listen to producers on the ground and understand the challenges they face in meeting stakeholder expectations. (Pamela Nath).
• There are so many sustainability indicators that measuring them all would be impossible. We must seek balance and focus on the most meaningful ones by setting clear

The sector must act strategically, choosing indicators that drive greater efficiency. Without profitability, there is no capacity for investment; and without investment, progress cannot happen.



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boundaries, understanding consumer perspectives, and following established guidelines, such as those from the ILO on labour practices. (Mike Kraft)

• Dialogue is fundamental to reconciling interests and enabling collaboration between industry and NGOs in measuring sustainability. Synergies must be cultivated: collaboration leads to extraordinary outcomes.

SESSION III: The vision of the value chain

[APROMAR / Garazi Rodríguez]

• APROMAR (Spanish Aquaculture Business Association) measures sustainability across four key areas: environmental, product, sectoral, and social. From these, it defines relevant indicators. Environmentally, the emphasis lies in advancing energy transition, analysing life cycles, reducing carbon and water footprints, and improving waste management practices; regarding product sustainability, APROMAR evaluates the sourcing and certification of feed ingredients, with a strong emphasis on fish welfare; in the sectoral area, it focuses on transparency, the impact of R&D&I investments, strong governance, and the integration of digital technologies; and on the social front, it monitors the implementation of collective labour agreements, with a focus on driving continuous improvements in working conditions.

[CONXEMAR / Luis García]

• Conxemar (Spanish Association of Wholesalers, Importers, Exporters and Manufacturers of Fishery and Aquaculture Products) measures sustainability through four strategic tools: a dedicated sustainability division, a shared value report, a sustainable fisheries map, and a guide to sustainability indicators. Its strategic shared value plan sets objectives across environmental, social, economic, and governance dimensions, and is built on five pillars: transformative knowledge, environmental commitment, human development, a resilient value chain, and responsible governance.

[ASEDAS / María Martínez-Herrera]

• ASEDAS (Spanish Association of Distributors, Self-Service Stores, and Supermarkets) outlines several strategic sustainability priorities: safeguarding supply chains, ensuring food safety and quality, maintaining price stability, promoting competitiveness, and remaining flexible in response to changing consumer behaviour. On the environmental front, it focuses on five key areas: reducing food waste, managing packaging, improving energy efficiency, lowering carbon footprint, and enhancing waste management. The association's primary concern within the sector is the decline in fish consumption. However, it does not endorse alarmist perspectives or agenda-driven narratives. Instead, it promotes dialogue and collaboration as essential tools to safeguard marine protein as a key component of the food system.

[KANTAR / Raquel Arribas]

• According to Kantar, the main consumer concerns regarding sustainability are global warming, water scarcity and pollution, plastic waste, and food waste. Although many consumers feel they could contribute more to environmental sustainability, 4 in 10 report that economic or social constraints hinder their ability to adopt more sustainable habits. Kantar identifies three consumer segments in relation to sustainability: eco-actives, eco-considerers, and the unconcerned. In Spain, the share of eco-actives is notably higher than in the other 30 countries surveyed, with this group predominantly being made up of older individuals. Is Spain, 7 out of 10 households continue to waste food, yet only 8% of that waste consists of fish. The study highlights that producers must earn consumer trust, as many believe producers are driven solely by profit. It is essential to communicate transparently and positively all the efforts the sector is making in terms of responsibility and sustainable commitment.

>> ROUND TABLE / IDEAS [Moderator: Nueva Pescanova / Nuno Cosme]

• One of the key challenges in measuring sustainability is understanding how legislation is applied, which in Spain can vary across autonomous regions: there is a pressing need to streamline and align regulatory frameworks. (Garazi Rodríguez)

• In sustainability and due diligence reporting, key measurement elements include: certification of resource sustainability, maximum contaminant thresholds, quota compliance, vessel and license registration, carbon footprint assessment, verification of

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human rights compliance, employee safety and training, external audits of social and labour conditions aboard fishing vessels, and the implementation of best practices in labelling and traceability. (Luis García)

• Supermarkets have a responsibility to clearly communicate that every product on the shelf has undergone rigorous controls and complies with sustainability standards. Consumer concerns centre on convenience, affordability, and the absence of contaminants in seafood products. (María Martínez Herrera)

• In terms of sustainability, fish consumers do not express distinct or different demands. (Raquel Arribas)

• Numerous technological advancements are driving improvements in aquaculture sustainability, including enhanced production methods, digital remote monitoring, improved water recirculation systems, pathogen detection sensors, and preventive health measures. (Garazi Rodríguez)

• Sustainable training within companies—especially amid evolving legislation—is essential for building a responsible sector. Commitments must be communicated transparently and with conviction. (Luis García)

SESSION IV: The vision of the institutions

[AECOC / Damián Martínez]

• In recent years, sustainability—and its associated reporting—has evolved from a strategic advantage to a regulatory imperative for companies. In 2019, the European Green Deal was introduced to decarbonize the economy by 2050 and transition toward a circular model. Since then, there has been a surge in regulatory frameworks, including the sustainability directive CSRD, the taxonomy regulation, the regulation against deforestation EUDR, and the due diligence directive CSDD. The CSRD came into effect in 2023, and in February 2025, the OMNIBUS package was introduced in response to the 2024 Draghi Report, aiming to safeguard the EU's competitiveness. These standards are cross-cutting, setting general requirements for companies, as well as specific environmental, social, and governance obligations.

[FAO / Bhakti Anand]

• The global regulatory framework for fishery and aquaculture trade is shaped by Multilateral Environmental Agreements (MEAs), involving three or more countries to address specific environmental challenges- at national, regional, or global levels- and Preferential Trade Agreements (PTAs), between two or more countries, which aim to reduce or eliminate tariffs and trade barriers through closer commercial ties. PTAs increasingly incorporate sustainability measures and responsible practices. Social and environmental regulations have increased ninefold between the periods 1995–2001 and 2018–2022, with the European Union, Asia, and the United States imposing the most stringent requirements. The four types of sustainability requirements include: subsidies or the prohibition of subsidies in areas affected by overfishing or IUU fishing; traceability systems; sustainable fisheries management and cooperation through RFMOs; and confirmation of adherence to MEA's agreements. To support understanding of this framework and promote sustainable fisheries and aquaculture management, the FAO offers a range of tools and resources..

>> ROUND TABLE / IDEAS [Moderator: ANFACO / Iñigo Azqueta]

• Considering the Draghi Report's warning about the risk of declining competitiveness, it is crucial to align regulatory demands with the sector's ability to respond. This requires the adoption of realistic and inclusive criteria that account for the capacities of all operators. (Damián Martínez)

• Regulatory fragmentation is a reality among countries. On a shared planet, if sustainability goals such as the SDGs can be aligned, then regulatory frameworks could be aligned as well. (Bhakti Anand)

• The first OMNIBUS deferral measure is a positive step, and it has already been implemented. (Damián Martínez)

• The European Union's high sustainability standards serve as a benchmark that prompts reflection in other nations, highlighting opportunities to enhance sustainability practices across diverse regions. (Bhakti Anand)

• Sustainability reporting can pose a barrier for small businesses, even as they work to overcome it. (Damián Martínez)

• Small-scale and artisanal fishers may not always be able to meet legal requirements, which is why inclusive regulations are needed. (Bhakti Anand)

• It is important to harmonize regulatory policies across countries by seeking equivalencies and enhancing technical exchange to support compliance. (Bhakti Anand) Common frameworks and shared language should be developed to enable the

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design of measurable standards. (Damián Martínez) All stakeholders in the sector must progress at a common and feasible pace for the collective. (Íñigo Azqueta)

SESSION V: The vision of science

[Future Ocean Lab - CIM Uvigo / Elena Ojea]

• Climate change has been a reality since the beginning of the century: in the first two decades, the temperature increased by 1.5ºC. Depending on how we control emissions, the planet will face different scenarios of temperature rise, each with its associated risks. Oceans provide coastal protection, which will be affected by climate change. As a society, it is crucial to reduce emissions through mitigation and adaptation actions. Climate change affects, and will continue to affect, fishing, and models have already predicted how fish schools will evolve and move: some countries will benefit, while others will be negatively impacted.

[IIM / Fran Saborido]

• Measuring sustainability is multifaceted and irregular, involving numerous relevant indicators influenced by rapid changes: climatic, technological, and social. It is essential to continuously measure and adapt to all emerging changes, building long-term historical data series. An integrated management of ecosystems is needed -tailored to local conditions- and measurements must be science-based, requiring systematic, large-scale, ongoing observation over time and across wide spatial coverage. The Marine Sciences Program of Galicia -part of the National Marine Sciences Program- includes 202 researchers from 11 institutions working on a marine observation and monitoring strategy built on three pillars: efficient and affordable technological development; a public, connected, integrated data platform; and advanced analytical tools for decision-making.

[EDHEC / Madlen Sobkowiak]

• Sustainability accounting requires acknowledging the convergence of many industries operating in the sea, making it impossible to assign responsibility for biodiversity changes to a single sector. Long-term progress depends on identifying biodiversity metrics that are relevant, measurable, and scalable across the entire supply chain; obtaining consistent data throughout that chain; and observing the temporal scale of ecosystem and biodiversity changes. Measuring sustainability is essential for progress, building trust, and making informed decisions. It is crucial to know what to measure—and why.

>> ROUND TABLE / IDEAS [Moderator: CETMAR / Rosa Chapela]

• As climate change disrupts traditional models, the static concept of measurement is no longer sufficient. A dynamic approach is essential, one that incorporates evolving parameters tied to protected areas and fisheries management. (Elena Ojea)
• Collecting data on a large and recurring scale is essential, and its main obstacle is political; not so much legal or financial, but rather a genuine conviction of its importance. (Fran Saborido)
• Complexity is another challenge. Measuring biodiversity is no easy task: excessive simplification leads to a loss of detail, so it is essential to strike a balance between simplicity and specificity, understanding what is being measured, why, and across all dimensions. (Madlen Sobkowiak)
• To harmonize broader visions without neglecting local realities, it is essential to better understand the barriers and analyse the cultural dimension, paying attention to local practices and knowledge. (Elena Ojea)
• For sustainability metrics to truly shape operational decisions within companies, they must be meaningful—illuminating pathways to better choices. When compliance becomes merely a reporting exercise, it risks losing its impact and becoming an empty formality. (Madlen Sobkowiak).
• The challenge in ensuring marine observation is embraced by public administrations and proves useful to the sector lies in establishing shared governance among science, government, and private enterprise- an approach that benefits everyone. Consumer support is also key. (Fran Saborido).

SESSION VI: The financial vision

[ACRONA / Bjarni Herrera]

• Blue finance is a complex process that considers sustainability, capital markets, and uncertainty. Managing ocean-related activities is full of challenges. The emergence of green finance involved identifying projects, establishing guidelines, setting thresholds, and assigning financial structures. In the early days of sustainability, there were no regulations: consensus and markets prevailed. Today, there are more challenges, regulations, and direc-

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tives. To advance blue finance, it's necessary to mobilize interest, identify what to measure, find funders, build relationships, understand the financial landscape, and have executives who can spot investment opportunities. It's also crucial to establish diversification strategies for seafood products that are relevant to consumers, consider fisheries management, and identify metrics for activity and financial return. Indicators may relate to fuel, energy efficiency, and emissions reduction, but also to certifications and the improvement of ocean ecosystems. If small-scale fishers take on risks, corporations investing in blue finance must be willing to take them on as well.

[OECD / Shaswhat Koirala]

• Since 1995, ocean-related activity has grown faster than the rest of the global economy, with high-income countries leading this growth. However, it is developing nations that rely most heavily on ocean economies, are most affected by climate change and plastic pollution, and face the greatest barriers to accessing capital, often at a higher cost. Blue finance must aim to support development. The OECD is working on establishing an Ocean Economy Index (ODA) that tracks investments in protected areas, offshore wind energy, marine oil extraction, conservation, sustainability, and plastic pollution prevention. Additionally, a set of guiding principles has been developed to support the financing and development of the ocean economy, aiming for a more balanced and predictable allocation of resources. Within this framework, biodiversity and climate-related actions already have defined goals and can therefore receive funding. Public financing is essential, but private capital support is also crucial.

>> ROUND TABLE / IDEAS [ABANCA / María García Cabezas]

• By 2030, blue finance is projected to reach a business volume of 70.000 million, a figure that could be even higher due to the overlap between what is classified as green and blue finance. Much remains to be identified as truly blue. (Bjarni Herrera)
• To increase blue finance, consensus among all stakeholders is essential, along with a clearly defined and adaptable framework that aligns with the financial sector and capital markets. This framework must include all actors and be governed by shared standards and objectives. In this context, a country's public debt can pose a barrier to mobilizing private capital. (Shaswhat Koirala)
• To assess sustainability, the fishing sector must prioritize sustainable financing—while keeping in mind that investors are focused on cash flows that generate returns, which requires offering high-quality products valued by consumers. Financial metrics are just as important as sustainability indicators and should be treated equally. The EU has placed strong emphasis on regulation, though perhaps with an excess of rules that markets often view as an unsustainable cost. Simplification would benefit everyone. (Bjarni Herrera)
• Major companies concentrate the profits, and these are largely located in the Northern Hemisphere. Moreover, many ocean-related risks are still not accounted for in financial markets, which prevents aid from effectively benefiting numerous coastal communities. It is also essential to integrate traditional knowledge into mainstream understanding and to recognize the shift between fishing and aquaculture, along with the distinct capabilities and needs of each activity. (Shaswhat Koirala)

SESSION VII: A vision from Europe

[Commission for Fisheries and Oceans / Antonio Basanta]

• The three objectives of the European Commissioner for Fisheries are sustainability, resilience, and competitiveness.
• The Ocean Pact, presented in Nice in 2025, aims to coordinate various policies and integrate the perspectives of all stakeholders. Restoring the health and productivity of the oceans; developing a sustainable blue economy; strengthening the resilience of fishing communities and island populations; ensuring maritime security; and expanding knowledge are strategic pillars for the future of the ocean and food sovereignty in Europe.
• The European Commission is working on several key fronts: revising the Common Fisheries Policy and strategic directives on aquaculture; helping future fishers adapt to climate change; strengthening the international dimension of fisheries and its Common Fisheries Policy -through dialogue with regional fisheries organizations-; ensuring a fair trade framework (level playing field); combating illegal fishing; and developing new regulatory approaches with countries that fail to act against illegal fishing. ■