

# Sustainable Fisheries

PARTNERSHIP



OUR  
**TARGET 75**  
INITIATIVE

SINCE ITS BEGINNINGS IN 2006, SFP HAS WORKED CONSISTENTLY WITH SEAFOOD INDUSTRY PARTNERS, GIVING THEM ADVICE AND GUIDANCE ON SUSTAINABLE SOURCING. CENTRAL TO OUR WORK HAS BEEN MOBILIZING PARTNERS AND THEIR SUPPLIERS TO IMPROVE ALL OF THEIR EXISTING SEAFOOD SOURCES—EVEN WHEN IT MEANT STILL BUYING FROM SO-CALLED “RED-RATED” FISHERIES.

From the early days, we realized we were on to something with this approach, starting with our work with McDonald’s on sourcing from various whitefish sectors. Within a few years, we saw a global impact. As more partners joined, similar efforts led to positive results in other sectors.

Now, SFP is looking at this from a global perspective, to gauge what our partners and others following the same approach can cumulatively achieve. We want to define a short-term target for this approach, outlining what we really want to achieve worldwide over the next three years through our combined efforts. Specifically, we want to see existing partners continue with their current work and hope to see new partners come on board, especially where there may be key sustainability gaps in the seafood industry worldwide.

Although the objectives of Target 75 may seem ambitious, our initiative is only calling for our partners and their suppliers to continue with activities that are already underway, and for some others to get on board. If companies are prepared to assess their supply chains, identify the fisheries and aquaculture regions that need improving, and mobilize their suppliers to launch fishery and aquaculture improvement projects (FIPs and AIPs), it will be possible to meet the target.



#### IN THIS DOCUMENT, SFP WISHES TO DO THREE THINGS:

1

Define a short-term target and how to get there.

2

Identify gaps in retailer/foodservice suppliers that we need to fill and in which sectors (see ‘Annex’ on page 6).

3

3. Invite everyone with a stake in sustainable seafood – buyers, suppliers, and even non-industry stakeholders such as NGOs – to adopt this approach and work toward this common target.





# OUR ULTIMATE GOAL

SFP's overall ambition has always been to see that 100% of seafood worldwide is produced sustainably – in other words, to give everyone in the world the chance to eat sustainable seafood. This is obviously a distant and aspirational goal, likely many decades away into the future, but if we're ever going to get there we need to lay out a route, complete with milestones and targets.

There are many ways to achieve this distant goal, but the one SFP favors involves mobilizing improvements in as much of the world's production as fast as possible, working with industry partners who have a stake in the future of the world's fisheries and fish farms. We want to see many examples of improvement efforts, even if the quality of those efforts varies, rather than merely a few examples of exceptionally good practice. SFP favors this approach because we believe it will reassure the world's largest seafood buyers that change is coming at a scale commensurate with the size of their global businesses, and hence give them the confidence to stay the course.

Our joint success over the years in key sectors has enabled our partners to make firmer and more public commitments over time. By working at this global scale, we have also attracted more of the supply chain to join these efforts, as the business payoffs of doing so became obvious.

For this initiative, SFP has set an interim target that, by 2020, 75% of world production in key sectors is – at a minimum – either sustainable or in a formal FIP or AIP making regular, verifiable improvements.

Based on the work we've done with our partners in the past and analysis of the global industry that we're doing today, we see the goal of 75% as a midpoint – an aggressive but realistic target. Some sectors will undoubtedly go beyond 75% as the relevant stakeholders work toward sustainability, while others will struggle to get there.

We also believe that this target sends a message to consumers, reassuring them that the majority of the seafood available in their area is sustainable, meaning everyone will be able to buy it.





# THE TARGET OF TARGET 75

IN SIMPLEST TERMS, A FISHERY OR AQUACULTURE OPERATION IS CONSIDERED WITHIN THE **"75%" TARGET** IF IT IS ONE OF TWO THINGS:

- **SUSTAINABLE** – For the purposes of this initiative, we define "sustainable" as operating at a level necessary to earn sustainability recognition such as Marine Stewardship Council certification, or green-listed in SFP's Metrics tool.
- **IMPROVING** – There are indicators of some improvement underway, that the fishery or farm is on track to ultimately reach an improvement level such as a FIP with a grade "C" or higher on SFP's FIP Evaluation Tool. A FIP of Grade C or better is making regular improvements, and is therefore on track to ultimately achieve sustainability.





# THE JOURNEY TO GET THERE?



AS WE INDICATED EARLIER, WORKING TOWARD THE 75% GOAL INVOLVES COMMITTING TO ACTIONS THAT MANY SEAFOOD INDUSTRY STAKEHOLDERS ARE ALREADY DOING NOW.

## ACTIONS SUCH AS:

- Systematically identifying and tracking all sources
- Reporting all sources via the Ocean Disclosure Project
- Requiring all suppliers to participate in mobilizing key vendors and getting FIPs and AIPs going
- Publicly reporting FIP progress (e.g., on [fisheryprogress.org](http://fisheryprogress.org))
- Getting all suppliers to participate in respective Supply Chain Roundtables or equivalent pre-competitive collaborations where necessary to drive FIPs and AIPs
- Setting realistic timelines for progress and holding suppliers and FIPs and AIPs to them
- Increasing public communication and claims in line with the progress made.

Already, SFP can point to many major industry stakeholders who are working on various improvement projects, either with SFP or other NGOs and advisors or entirely on their own, and it is our hope that this initiative will inspire interest from new buyers in new sectors.

We're also reaching out to marine conservation NGOs, as we think the core mission of this initiative will complement their own.

We've known since we first conceived of this idea that it wasn't going to be easy, and we know this goal is a challenge, but we don't see this as throwing down the gauntlet. Instead, this document serves as a heads-up to industry, NGOs and donors, often working independently and on small parts of the global fisheries picture, of what has already been achieved through this work and what can be achieved through more concerted collaboration and alignment.

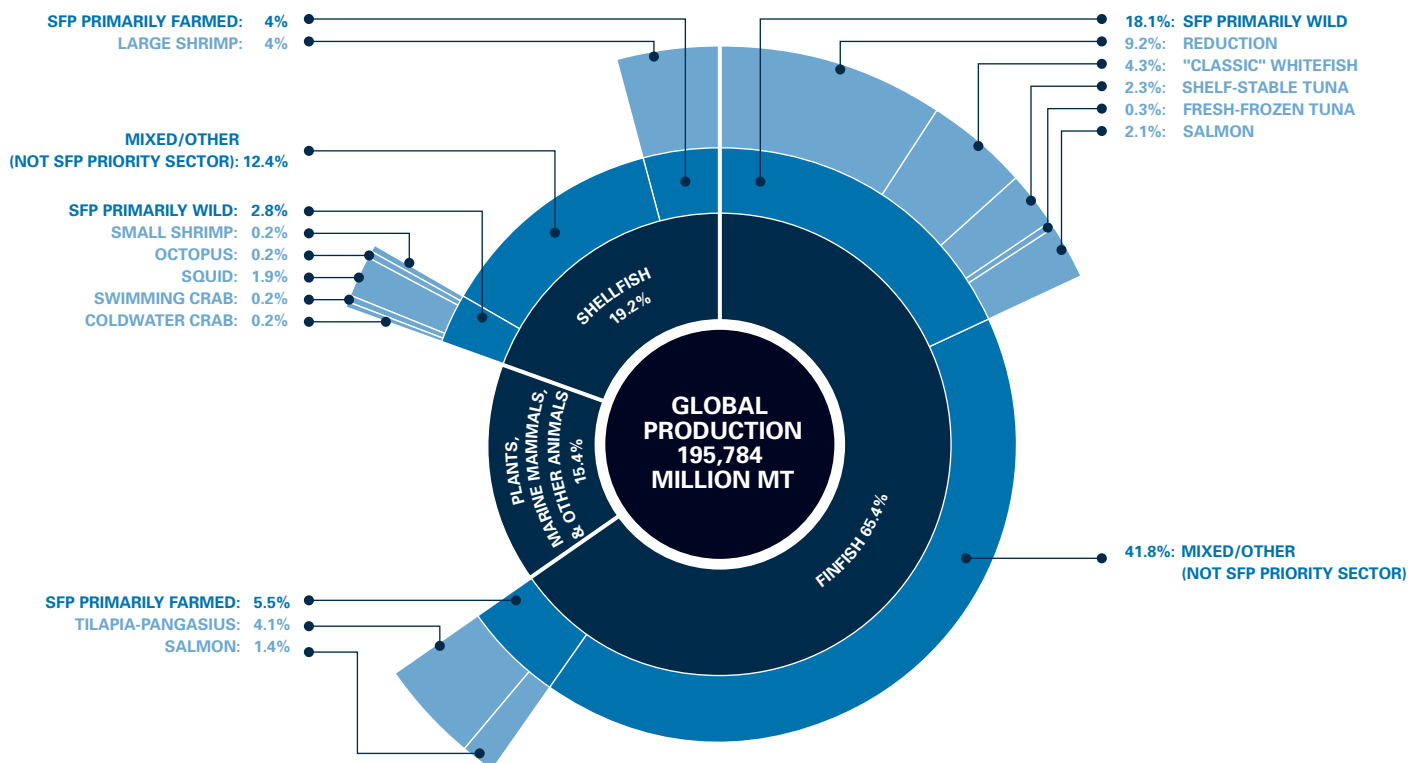
We also see this initiative as an invitation – to our current and future partners, industry stakeholders who are not working directly with us, and NGOs with whom we share a common goal – to come together behind this approach and help transition the seafood industry to sustainability on a global level. For SFP, this started as a unique approach to working with a limited number of industry leaders. With your help, we hope to make this much more than an approach – we want this to truly become a movement.

# ANNEX: THE SECTORS

AS PART OF OUR TARGET 75 INITIATIVE, SFP HAS DIVIDED UP THE GLOBAL SEAFOOD INDUSTRY INTO A SERIES OF SECTORS AND SUB-SECTORS, DEFINED LARGELY BY SPECIES.

While the sectors as a whole do not cover the entirety of the global seafood industry – some very high-volume species such as carp, milk fish, and shellfish, are not included, for example – they represent a substantial amount of commercial seafood production of importance to markets currently demanding sustainability. For each sector, we present a broad analysis with an approximate assessment of how much progress has been made so far toward the Target 75 objectives.

## MAJOR COMMERCIAL SEAFOOD SECTORS AND SUPPLIER ROUNDTABLES:

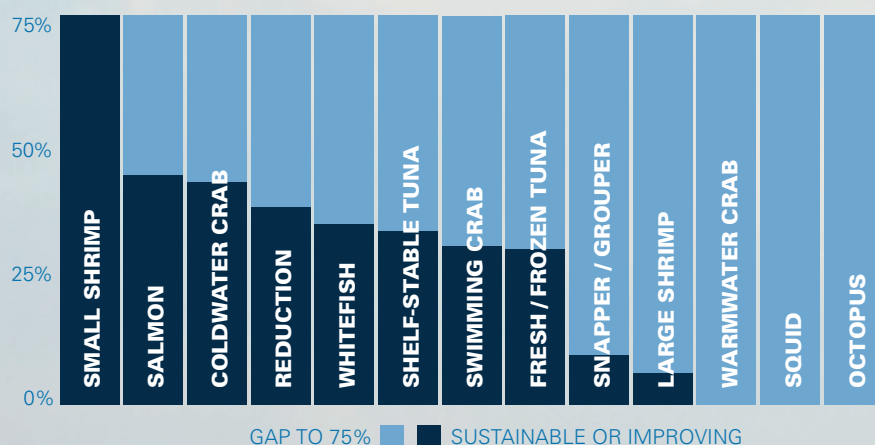




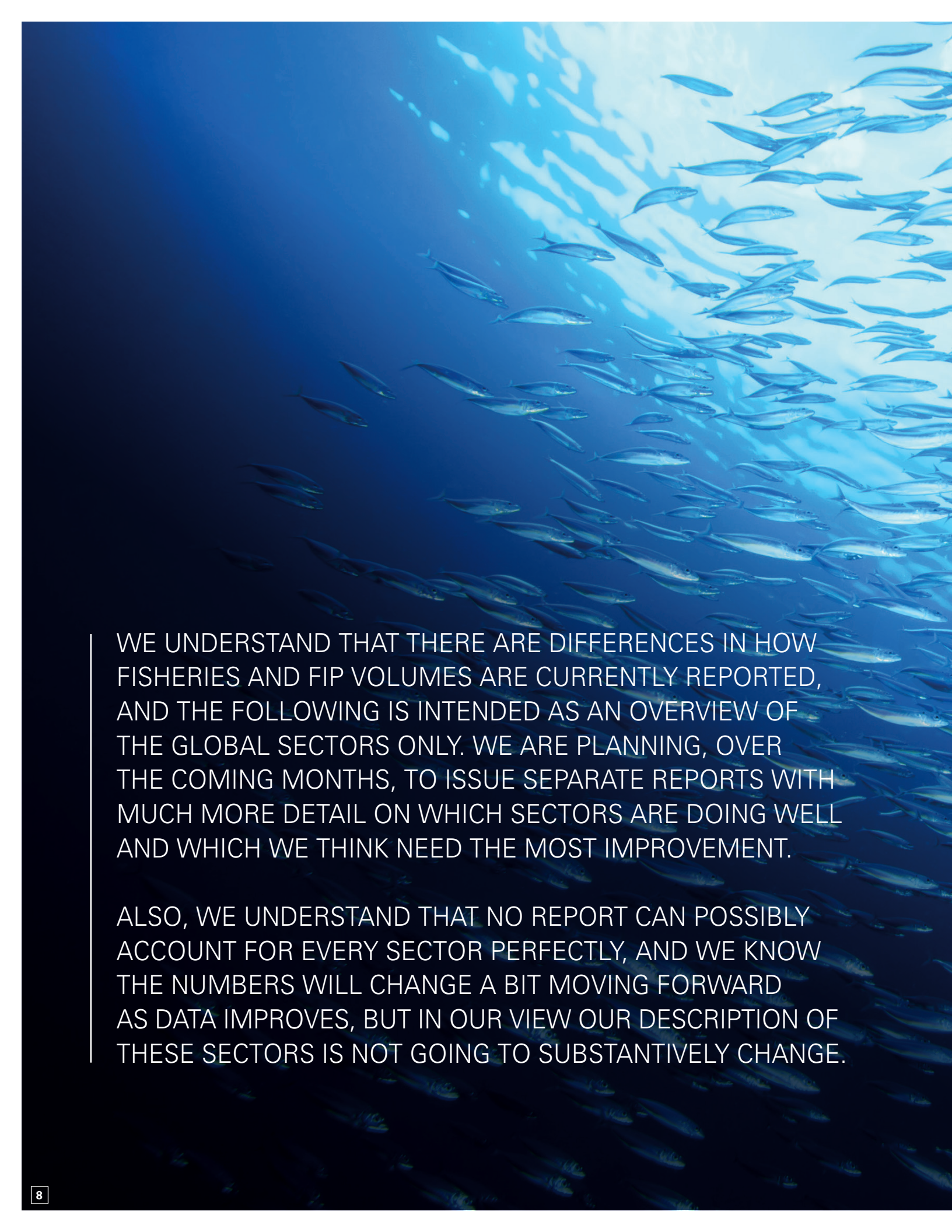
For the sectors with a greater percentage of volume from improving supplies, the buyers in these countries have been able to exert considerable leverage. Accounts in those countries, though often buying less than 50% of a sector's total production, are too important for producers to ignore. What we need in these sectors is to build on the progress made so far, and we list our recommendations accordingly.

Several key sectors fall very far short of SFP's target, with less than 10% of the

world's supply on the path to improved sustainability (see chart below). SFP's biggest challenge at the moment is figuring out how to increase improvement efforts in these sectors. We believe the principal reason for lack of progress is our existing partner base simply buys too small a share of global production, which suggests we need to involve different buyers in the improvement process with sufficient leverage in certain markets. For these sectors, we list some geographical regions that might have such buyers available.







WE UNDERSTAND THAT THERE ARE DIFFERENCES IN HOW FISHERIES AND FIP VOLUMES ARE CURRENTLY REPORTED, AND THE FOLLOWING IS INTENDED AS AN OVERVIEW OF THE GLOBAL SECTORS ONLY. WE ARE PLANNING, OVER THE COMING MONTHS, TO ISSUE SEPARATE REPORTS WITH MUCH MORE DETAIL ON WHICH SECTORS ARE DOING WELL AND WHICH WE THINK NEED THE MOST IMPROVEMENT.

ALSO, WE UNDERSTAND THAT NO REPORT CAN POSSIBLY ACCOUNT FOR EVERY SECTOR PERFECTLY, AND WE KNOW THE NUMBERS WILL CHANGE A BIT MOVING FORWARD AS DATA IMPROVES, BUT IN OUR VIEW OUR DESCRIPTION OF THESE SECTORS IS NOT GOING TO SUBSTANTIVELY CHANGE.







# THE SECTOR LIST

## **WHITEFISH:**

This sector includes both “classic whitefish” and tilapia and pangasius sub-sectors, with all “classic whitefish” species falling into Group 32 of the United Nations Food and Agriculture Organization’s International Standard Statistical Classification of Aquatic Animals and Plants (FAO ISSCAAP). This includes cods, hakes, and haddocks, with the following exceptions: *Micromesistius poutassou* (blue whiting), *Merlangius merlangus* (whiting), *Trisopterus* spp. (Norway pout, pouting, poor cod), and species classified as whitefish but not ISSCAAP 32 (i.e., sablefish, Patagonian toothfish, Antarctic toothfish, New Zealand blue cod, American yellow perch, Japanese threadfin bream, and ornate threadfin bream). The tilapia and pangasius sub-sector is predominantly of farmed origin. While over half of “classic whitefish” volumes are considered to be improving, the same is only true for approximately 10% of tilapia and pangasius volumes. Buyers can further encourage progress by urging tilapia and pangasius farmers to initiate AIPs, additional “classic whitefish” fisheries to initiate FIPs, and fisheries already in FIPs to become MSC certified.

## **TUNA (SHELF STABLE):**

Over 90% of the world’s pre-cooked tuna (largely skipjack and yellowfin) comes from purse seine vessels, while 7% comes from longline vessels specifically targeting albacore for canning (fishing under flags from China, Taiwan, and Pacific Island

countries). Included is also tuna supply from pole and line fisheries, although this is only a small portion of the shelf-stable category. This sector shows promising improvement and a high degree of engagement from suppliers. We recommend continuing to urge additional fisheries to initiate FIPs and to seek better management regulations and implementation at the regional and national levels in future.

## **TUNA (FRESH OR FROZEN):**

This sector comprises the supply of fresh (chilled) and frozen bigeye and yellowfin tuna from longline and handline fisheries. Note that this does not include the three bluefin species as a target sub-sector for tuna, as SFP recognizes that interventions to improve bluefin tuna fisheries require a different approach, given smaller volumes in very specialist markets that may be out of reach. Large-scale distant-water longline vessels supply frozen tuna. Small- to medium-scale offshore vessels supply fresh (chilled) tuna.

For fresh and frozen tuna, fewer than 10% of the global producers are considered to be improving. We recommend engaging the Spanish, US, and other EU foodservice markets, ideally, along with Japanese tuna suppliers.

## **SHRIMP (SMALL):**

This sector consists of wild, predominantly coldwater shrimp, often referred to as “salad shrimp,”

or smaller than 100 shrimp per pound in body size. This sector also includes small warmwater shrimp such as seabobs, as their market usage is more similar to coldwater shrimp. Paste shrimp are not currently included in the overall shrimp sector. This sector is already doing extremely well, reaching the 75% target due in part to the engagement of large buyers from the US and EU alone. We recommend building on this success by engaging smaller farmers of these shrimp as well.

## **SHRIMP (LARGE):**

This sub-sector consists of farmed shrimp and wild warmwater shrimp. It also includes larger coldwater shrimp such as Argentine red shrimp and spot prawns. Species are typically larger than 100 shrimp per pound in body size. Currently less than 10% of the sector is improving. We recommend buyers encourage producers to initiate FIPs and AIPs.

## **SALMON:**

The sector includes all salmon that is sold fresh or frozen (farmed Atlantic salmon predominates) or in shelf-stable form. Both wild and farmed salmon show good improvement progress, placing them among the 75% already. We recommend wild-capture fisheries seek MSC certification and that farms in AIPs move toward a zonal approach to management and continue on the path to meet farm-level certification standards.



#### **REDUCTION FISHERIES:**

This sector includes two main sub-groups of global supply, which are differentiated by the end markets:

- Atlantic/Pacific reduction fisheries, which generally end up reduced to fishmeal and oil in aquaculture feed for markets in the Americas, Europe, Australia and Asia; consists mainly of small pelagic species such as anchoveta, sandeel, or sardine, but also includes species from a few other biological groups (for example, blue whiting, a cod like species (Gadidae family), and Antarctic krill, a crustacean). Atlantic and Pacific reduction fisheries are doing relatively well. We recommend expanding on this success by persuading key sardine/anchovy fisheries to continue initiating FIPs and to seek certification from third-party organizations such as the MSC.
- Southeast Asia reduction fisheries include the SE Asia “trash fish” (multispecies-trawl fisheries) and directed small pelagics fisheries, which are mainly used as a fishmeal component in feed in the SE Asia shrimp farming industry. These fisheries still require significant improvements with less than 10% of the volume from improving fisheries.

#### **COLDWATER CRAB:**

This sector comprises all crabs from coldwater regions (e.g., king and snow crabs) and deepwater

crabs from tropical and temperate regions. All production is from wild fisheries. Buyers in North America and northern and western EU countries have prompted the fisheries to achieve MSC certification and demonstrate strong improvement, though more work is needed to encourage some remaining fisheries to initiate FIPs and those in FIPs to continue improvements.

#### **SWIMMING CRAB:**

This sector comprises all sources of blue swimming crab and crab species that can substitute for blue swimming crab on the market. Species include: blue crab (*Callinectes sapidus*), blue swimming crab (*Portunus pelagicus*), red swimming crab (*Portunus haanii*), and Central American swimming crabs (*Callinectes* spp.) (i.e., Central American countries only in the case of *Callinectes* spp., which can be found in countries outside of Central America). The supply chain is dominated by US importers and well organized in mobilizing and supporting FIPs in Asia through the NFI Crab Council, as well as some independent efforts (e.g., in Mexico). These efforts needed to be expanded to include some significant producer countries not yet in FIPs. These fisheries are dominated by small-scale fisheries that often require significant long-term improvement efforts to put in place robust co-management systems. FIPs need to be sufficiently well designed and supported that they are up to this long-term task.

#### **WARMWATER CRAB:**

This sector comprises all crabs from tropical and temperate waters, with the exception of blue crabs and swimming crabs. A popular species is mud crabs. This sector needs much improvement and buyers in destination markets should support the initiation of FIPs.

#### **SNAPPER AND GROUPER:**

This sector comprises all wild and farmed snapper (*Lutjanidae* family) and grouper (*Serranidae* family) species and similar reef fish. Less than 10% of these fisheries worldwide show evidence of improvement. While US food service has some leverage, we also want to involve buyers based in Indonesia, Philippines, Malaysia, and Thailand, along with Brazil and countries in Central America.

#### **OCTOPUS:**

All octopus species (family Octopodidae). At present, less than 10% of the global industry can be considered improving. We recommend engaging buyers in the Spanish and other key markets to help.

#### **SQUID:**

All squid species, including those in the families Gonatidae, Loliginidae, Ommastrephidae, Onychoteuthidae. As with octopus, less than 10% of global producers are considered to be improving, and Spanish markets may hold the key to engaging buyers with enough influence to provoke change, but we are also looking to engage US and EU foodservice companies.



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# FURTHER INFORMATION

[www.sustainablefish.org](http://www.sustainablefish.org)

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