



November 2007

SUSTAINABLE
FISHERIES
PARTNERSHIP

UPDATE

The mission of the Sustainable Fisheries Partnership is to maintain healthy ocean and aquatic ecosystems, enhance fishing and fish-farming livelihoods and secure food supplies.

Welcome to the first edition of the Sustainable Fisheries Partnership's Update, a newsletter reporting on the partnership's work to improve fisheries and fish farms globally.

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SFP celebrates its first year

In the short span of a few decades, global whitefish fisheries have declined so rapidly that retailers and suppliers are scrambling for sustainable sources of fish.

Where there used to be a choice of several dozen sources for seafood businesses just 30 years ago, today, all but a few are considered over-fished. But fisheries can be sustainable, and many are well-managed, including most of the remaining healthy whitefish fisheries. Seafood businesses and marine conservationists need to work together to meet the global demand for seafood in a responsible manner and address the burgeoning environmental challenges threatening marine ecosystems.

A year ago, the Sustainable Fisheries Partnership (SFP) emerged. The partnership aims to guide responsible seafood sourcing through better access to fisheries information

and to enhance the ability of seafood companies and partners to improve fish-farming and capture fisheries. To this end, the partnership has mobilized a team of experts around the globe to help seafood businesses improve the fisheries they rely on. So far, we have advised numerous companies and groups on fish sourcing and standards and we have launched our own website as well as an information portal, FishSource™.



www.sustainablefish.org

The Sustainable Fisheries Partnership may have just started up but already we have successes to note. Moreover, we have learned lessons from working with producers, retailers and distributors in the field about how to harness the power of the private sector for conservation. With this inaugural newsletter, we celebrate the partnership's first anniversary. This newsletter and our website aim to provide regular updates about our programs and to provide information resources for those who share in the partnership's goals. We welcome your comments and feedback.



CEO UPDATE

Dear Readers,

A year ago, we formed the Sustainable Fisheries Partnership (SFP) as an independent non-governmental organization (NGO) capable of breaking new ground in the world of sustainable seafood and marine and freshwater conservation.

Our vision was to enable leading private-sector stakeholders to become more pro-active in the management of “unsustainable” sources of seafood, to help put them on the path to sustainability.

The private sector often has a key role to play in overcoming political obstacles to policy change in fisheries management bodies. It can also use private procurement requirements to directly raise the standards of fishing practices and improve compliance with existing regulations. In many fisheries worldwide, improvements in the water simply are not possible without private-sector leadership. By forming SFP, we felt we could fill a specific gap between industry and the marine conservation community.

Why a new NGO?

In forming SFP, we had to be prepared to work wherever seafood was coming from, and could not be confined to the established geographical priorities of many other NGOs. To truly succeed in our goal, we need to work closely with companies – ideally inside the “decision-making loop” – and that means taking a low-key non-activist stance. It also means our objectives must be in alignment with the sustainability aims of responsible seafood companies to secure a reliable future supply of fish and a healthy marine environment.

Engaging seafood businesses requires a lot of trust and credibility. Fishing companies are typically used to operating anonymously and many have had difficult past relationships with NGOs. Trust is not freely given to “outsiders” new to a fishery, but is something earned over decades by local sustainable fisheries leaders with a proven track record and solid relations with industry, government and NGOs. So the Sustainable Fisheries Partnership finds and invests in such people, and runs mainly as a

“virtual” or “network” organization with few headquarters staff and low overheads.

What we do

We provide strategic and technical guidance to seafood suppliers and producers, help convene them together with other like-minded companies in Fisheries Improvement Partnerships, and build consensus around specific improvements in policies, marine conservation measures, and fishing and fish-farming practices. Details of our projects and corporate partners are provided in this newsletter.

Seafood companies run on narrow margins, and are understandably reluctant to take too much risk. Hence the advice and guidance we provide is always evidence-based, drawing on examples of success from around the world.

Our focus on improving unsustainable fisheries means we often find ourselves in grey areas. How big an improvement must a fishery make in order to earn its place in a responsible supply chain? When is a company doing enough to help improve a “bad” fishery to justify continued sourcing? How much influence is a company likely to have on a fishery if it stops sourcing? Will a halt in sourcing actually make a difference to price or demand, particularly in a sellers market? We are working hard to develop clear and transparent metrics to measure improvements and levels of company involvement.

How we fit in to the marine conservation community

The Partnership’s approach complements the work of the Marine Stewardship Council (MSC), by working to improve “unsustainable” fisheries and thereby enabling more fisheries to come forward for eco-labeling. While our focus is on consensus, and therefore requires compromise, our efforts have helped build critical private-sector support behind many of the policy measures and capacity-building efforts of “traditional” NGOs in several of the fisheries where we work. We also work closely with other NGOs and aquariums to provide advice to major seafood buyers, to share technical and scientific data through FishSource™, and to help engage their corporate partners in fisheries improvement efforts. Our approach would be much more difficult without the efforts and successes of these other groups, and the willingness of leading companies to participate in fishery improvement efforts.

Who We Work With

I first sought to engage seafood suppliers and producers in fisheries improvement efforts in

2002, when I started advising McDonald’s on how they could source sustainably, as part of a larger partnership between the company and Conservation International, where I used to work. The long-term sustained interest and effort by McDonald’s and their suppliers is making a significant contribution to sustainability in key whitefish fisheries worldwide.

In 2004 I started working with Wal-Mart on their seafood sourcing and introduced them to the MSC. Since 2006, the Sustainable Fisheries Partnership has partnered with the MSC, WWF-US and other groups to engage and support Wal-Mart and their suppliers in their efforts to improve fisheries and encourage them into the MSC program. The clarity and high profile of the Wal-Mart commitment has raised awareness of seafood sustainability worldwide, and stimulated many fisheries to increase or enter into improvement and certification efforts.

In 2006 Young’s Seafood invited me to join their Sustainability Group as an adviser. Young’s supplies around 80 percent of the MSC products available in the UK, and have been at the forefront of seafood sustainability efforts for many years. They have invested heavily in sustainability, developed an in-house expertise second to none in the industry, and helped fisheries worldwide to make improvements and enter the MSC program. Companies have to balance competing needs, and could – from an NGO perspective – always do more for the environment, but if all seafood suppliers followed Young’s lead, the world’s fisheries and oceans would be in much better condition today.

Individual leadership within seafood companies and buyers is essential, and I personally would like to thank Gary Johnson, Bob Langert and Keith Kenny of McDonald’s, Klaus Nielsen of Espersen, Andrew Yanagihara of Delmar, Peter Redmond of Wal-Mart, Manish Kumar of the Fishin’ Company and Mike Parker, Mike Mitchell, Simon Rilatt, Anna Roslund and Cliff Morrison at Young’s Seafood for all their efforts and invaluable advice over the years.

I would like to thank the David and Lucille Packard Foundation for the support needed to get SFP up and running, and thank their Marine Fisheries subprogram staff – past and present – for all their advice and encouragement.

This first year has been an exhilarating ride. We have much to do, but I am enormously encouraged by the results we have obtained and hope you will agree that we are onto something here.

- Jim Cannon

FishSource™ Goes Live

FishSource™ consolidates and summarizes the main scientific and technical information that seafood buyers and their expert advisers need when evaluating the sustainability of fisheries.



Purpose

Any company trying to buy sustainably has to know which fisheries they are buying from, and then evaluate the sustainability of each of those fisheries. It sounds simple, but a company sourcing from hundreds of fisheries would need to spend hundreds of thousands of dollars each year just to gather some basic information for decision making – and that is enough to erect a knowledge “barrier” to sustainability for many companies. FishSource™ is our answer for companies to overcome that knowledge barrier.

FishSource™ works by providing a platform for open sharing of the public components of fisheries sustainability analyses. Ninety percent of the work experts do when evaluating the sustainability of different fisheries is simply pulling together and summarizing technical information on fisheries management, stock status and environmental impacts. Each company and expert might use different metrics to evaluate sustainability, but they are all reading the same public data and information, and summarizing it in the same way. This “public component” of each analysis can be shared openly, without disclosing any confidential or proprietary information, and dramatically reduce the costs companies and their NGO and aquarium advisers face in evaluating seafood sustainability.

FishSource™ does not itself determine sustainability, nor make “buy/don’t buy” recommendations. Instead, it is intended as a neutral information resource for groups defining sustainability and making sourcing recommendations. We hope the information will also be useful to certifiers doing MSC pre-assessments but FishSource™ cannot be used as

an eco-label, and does not substitute for the necessary in-depth assessments of the MSC.

Structure



www.FishSource.org

Each Fishery Profile starts with a simple Identification section, to help visitors to the site make sure they’ve found the right fishery.

The scientific and technical information from each contributor to FishSource™ appears in the Sustainability Info section. Contributors are also invited to submit basic facts and history about the fishery into the Basics section. The Sources section explains the origin of the information.

FishSource™ staff then summarize the information in the Sustainability Info section into a standard, highly condensed summary, which appears in the FishSource™ Summary section. Our summaries are designed to meet the information needs of seafood sustainability analysts.

FishSource™ staff also take quantitative data from stock assessments and management evaluation reports and report common indicators of sustainability on the FishSource™ Scores section. These scores are designed to be used by companies to help them monitor how they are doing in meeting their sustainability commitments.

Source of information

The information currently on FishSource™ comes from consultants, government agency reports, and updates or extracts from existing fishery evaluations by NGO advisers to major retailers and fish buyers. But our aim is that all the information on FishSource™ will ultimately come from the foremost experts in each fishery, rated and commented on openly and transparently by visitors to FishSource™.

To achieve this, FishSource™ has launched an interface that allows experts in individual fisheries to contribute information. A blue ribbon science advisory board chaired invites experts to participate.

FishSource™ has a fully open review facility that allows anyone who visits to rate the information provided and make comments. This open user-review is designed to ensure the information on FishSource™ is as balanced and complete as possible, and to clearly highlight any contributions that fall short of these ideals.

Development Strategy

We are taking the following strategy for filling out FishSource™ and covering as many fisheries as possible:

- We are creating Identification and Scores sections for as many fisheries as possible. Many of the world’s most important commercial fisheries have annual stock assessments, and we are working to capture this data in our Scores sections. This provides a bare minimum of information on each fishery, and is the minimum seed information needed to enable additional contributions from invited experts.
- We are providing initial Summary and Sustainability Info sections for fisheries critical to our corporate partners. When we launched FishSource™ for Alpha testing in April 2007, it included SFP reports on 23 of the main wild sources of “whitefish” worldwide. We are now updating those reports, and working with NGO and Aquarium partners to load up information on other fisheries.
- As our NGO and Aquarium partners evaluate fisheries for their own purposes, we are inviting them to share the public components of their evaluations on FishSource™.
- We are now asking the Science Advisory Board for FishSource™ to nominate expert contributors to make modifications and add new information to all the fisheries listed.

FishSource™ currently has some level of information on approximately 50 fisheries, with many more soon to be added.



FISHERY IMPROVEMENT PARTNERSHIP UPDATE

Fishery Improvement Partnership



Loading trawl doors onto a shrimp boat

A Fishery Improvement Partnership is an alliance of buyers, suppliers and producers that work together to improve a fishery by pressing for better policies and management while voluntarily changing purchasing and fishing practices to reduce problems such as illegal fishing, bycatch and habitat impacts.

We convene these partnerships to help seafood producers and buyers advocate for better fisheries management.

Barents Sea cod



The Barents Sea cod stock is currently in relatively good condition, but its future has appeared uncertain because illegal over-quota fishing pushed the real catch far beyond sustainable levels. SFP helped seven major buyers send a letter to the Norwegian government seeking more effective ways to identify vessels fishing illegally, and advised Espersen and other companies on the design of an industry-wide standard supplier contract. Following the adoption of the contract, official figures estimated illegal catches of cod and haddock were reduced by 23% and 55% respectively. In October, SFP met with leading companies to discuss future work and formalize the Fishery Improvement Partnership.

Baltic cod



The stock is at low levels and a formal recovery plan has been implemented by the EU. Illegal fishing is the key remaining obstacle to sustainability. SFP joined Espersen and Young's at the Baltic Regional Advisory Council meeting in March, when both companies gave strong messages against illegal fishing. Their support helped secure ministerial commitments which led to EU audits of the fishery and a requirement to stop fishing by Polish. Unfortunately, rather than work to identify a sustainable solution for their fishermen, the Polish government disagreed with the numbers and refused to close the fishery.

Russian pollock



We first convened major buyers and producers of Russian pollock in April 2006. Four main recommendations emerged: (1) organize the Russian catchers to press for improvements; (2) seek greater clarity over the condition of the fish stocks; (3) assess the need to verify the legality of catches; and (4) undertake an MSC pre-assessment. SFP reconvened the group in April 2007, to hear about the creation of the Pollock Catchers Association, their successes in reducing pollock roe recovery rates, and their decision to go ahead with the pre-assessment. SFP is working with a leading Russian company to assess legal verification schemes.

Argentine hake



SFP is supporting the work of Centro Desarrollo Y Pesca Sustentable (CeDePesca), an Argentinian NGO founded in 1997 that works to make fisheries economically, socially and ecologically sustainable. We are helping organize buyer and international supplier interest, and helping fund CeDePesca's work with the catchers. CeDePesca's industry partners represent more than 40% of the total quota and are pushing the Argentine government for greater transparency and control, surveillance and monitoring. The effort has garnered useful media coverage and some success as the government promises to strengthen controls and conservation efforts.



FIPs UPDATE CONTINUED

Spotlight: Gulf of California

We are putting buyers, suppliers and producers together in a Fishery Improvement Partnership to press for general improvements in the fishery overall, and supporting the efforts of Grupo Valcer, a progressive Mexican shrimping company using lower-impact trawl gears.

Our focus with Grupo Valcer has been on defining the types of gear modifications to be adopted, testing their effectiveness, and deploying monitoring systems to provide assurances to buyers that the shrimp landed in Mexican ports by these vessels has indeed been caught by these gears. We place private observers on vessels to verify that the gears are being deployed correctly and functioning as intended. We are also deploying – for the first time in the fishery – an electronic catch registration system (or electronic log-book) on the participating boats to monitor their location and catches.

The catch registration system was developed and installed by De Haan Automatisering and

is a modification of part of the tried and tested Young's Trace system. SFP thanks Young's Seafood for their permission and support to allow us to visit Scottish scampi fisheries and see the system in action.

WWF and CleanFish are key partners in the project, with CleanFish marketing the lower-impact shrimp in the United States under the Fisherman's Daughter Wild Sonora Coast Shrimp® brand.

Chilean hake



Formal stock assessments indicate the resource is at low levels, though the exact status of the stock and the cause of the decline are disputed. The fishery had been undergoing MSC full assessment, though this stalled some years ago and the fishery has now been removed from the MSC site. The stock declines and impacts on catches have led to a battle between artisanal and industrial fishers over quota allocation and the need to close the fishery. These debates are critical for sustainability, but the intensity of the dispute must diminish before an inclusive improvement partnership is possible.

Chilean hoki



SFP and CeDePesca prepared an evaluation of the fishery for FishSource™ and met with Chilean hoki producers to provide guidance on seeking MSC pre-evaluation of the hoki fishery. The MSC pre-assessment provides an independent third-party check that either determines a fishery is good enough to come forward for full assessment, or identifies the key areas when improvements must be made.

Argentine hoki



SFP and CeDePesca have also recommended MSC pre-assessment in order to clarify the actions necessary to better manage this fishery. Companies involved in the fishery are discussing a proposal to create a management commission together with the government and to build a management plan, and have shown strong interest to go ahead with an MSC pre-assessment.

Gulf of Mexico shrimp



SFP is just beginning work in the Gulf of Mexico, and is partnering with the Ocean Conservancy. Our goal is to work with major buyers and suppliers to help the various groups, agencies and industry bodies in the Gulf deploy effective by-catch reduction devices across the fleet, to ensure the shrimp fishery meets red snapper by-catch limits. By-catch of red-snapper is one key obstacle the Gulf of Mexico shrimp fishery must overcome before it can be considered sustainable.

Indonesian blue swimming crab



Indonesia is the fourth largest blue swimming crab producer in the world, and the major source of imports to the US. SFP discovered Phillips Seafood and others in the Indonesian industry were – at their own initiative – forming the Indonesian Crab Producers Association to address sustainability. The Association invited SFP to present on the MSC and Fishery Improvement Partnerships, and discuss opportunities to enhance the sustainability of Indonesian blue crab fisheries. Discussions are on-going about how SFP can work together with Phillips and the Association.

Greening Aquaculture

The Sustainable Fisheries

Partnership is leveraging retailer and supplier influence to improve the rapidly expanding aquaculture sector. We are starting by working with tilapia and Vietnamese catfish farmers to better understand and mitigate their environmental impacts, and we're participating on the steering committees of WWF-US Aquaculture Dialogs for both these species, to help set outcome-based standards for eco-labeling.

Most of the world's farmed fish production comes from millions of small farmers across Asia, Africa and Latin America, yet these farms cannot afford to be audited against the kinds of rigorous eco-labeling standards under development. We are reviewing approaches taken in other sectors – forestry, agriculture, organics - to develop or modify eco-labels to make them feasible for small farmers.

We are also reviewing world supplies of fish meal and fish oil, to promote transparency about the sustainability of key wild capture fisheries that supply feed for aquaculture. We will then work with these fisheries and feed manufacturers to identify needs and opportunities for Fishery Improvement Partnerships to tackle growing concerns about potential for depletion of these important fish stocks.

Tilapia



Tilapia Hatchery

Several eco-labeling schemes and standards are emerging for tilapia. SFP is comparing these schemes by running side-by-side audits on ten different tilapia farms for each scheme. The results will allow stakeholders to see how the

schemes stack up against one another. Farms that do well against all the schemes will be in a strong position to sell into a diverse range of companies and markets, while buyers sourcing from these farms will have the highest degree of confidence available today in the environmental performance of their sourcing.

Our comparisons will reveal which, if any, of the emerging standards is an "easy marker" and provide information on why it is so. The comparisons and real-world testing will also reveal whether some of the criteria are redundant and simplifications are possible.

SFP is putting together a methods committee comprising individuals from each of the different standards. The committee will agree to a draft methods description, describing how the audits are to be carried out, and how the results are to be analyzed. This draft method will be applied on the first farm to undergo the side-by-side audits, and the methods committee will then reconvene to assess the work and agree on the methods to be applied to the other farms.

SFP is also now identifying the farms to include in the study. During WWF's Tilapia Aquaculture Dialog in Kuala Lumpur, SFP connected with several tilapia farms that are willing to be involved in testing different auditing standards available for tilapia. A field visit to a farm outside of Bangkok was conducted in September 2007 to better understand the farm operation and we received positive response from the farm to be included in the testing.

Vietnamese Catfish

Vietnamese catfish, also known as "tra", is on track to become the largest source of whitefish in the world by the end of this decade. We have been discussing with Can Tho University and WWF in the Greater Mekong Region to do water testing in ten farms in the Mekong Delta to measure the water quality of water coming in and leaving the ponds. A visit to Can Tho

University and several farms in the province was conducted in September 2007 to better understand tra catfish production in that province.



Catfish Pond

We expect that 14 months of field work in collaboration with Can Tho University's College of Aquaculture and Fisheries will commence in early December 2007 to cover at least two croppings of tra. The preliminary results are expected to be available in the first quarter of 2008.

We are also undertaking a preliminary assessment of the likely scale of impacts from all tra catfish farms combined, relative to impacts from other activities in the lower Mekong watershed, such as agriculture.

Fisheries for Fish meal and Fish Oil



North Sea Sandeel

Aquaculture is the leading user of fish meals and oils. SFP's objectives are to promote the use of sustainably harvested fish for the production of fish meals and fish oils for fish feeds, and encourage general disclosure of raw materials for fish feeds.

SFP has completed a rapid assessment to identify main sources of fishmeal and fish oil production in the world. We are now collecting and summarizing scientific and technical information to prepare Fishery Profiles for these fisheries on FishSource™. Our work in South American feed fisheries will be done with CeDePesca, our long-term partner in the region. The reports will be a basic assessment of the management quality, stock status and environment/biodiversity of Peruvian anchovy, Chilean anchovy, jack mackerel, chub mackerel, sardine and pilchards. We expect that the information will be publicly available on the FishSource™ website by early next year.



PRODUCTIVE OCEANS PARTNERSHIP UPDATE

Protecting the Sea that Feeds Us

The Productive Oceans Partnership is a project that works to help the seafood industry confront ocean acidification. This global threat to ocean productivity has been called “the evil twin” of global warming, because both arise from human emissions of carbon dioxide.

Mainly produced by burning fossil fuels, CO₂ emissions now exceed 32 billion tons per year (Manning, IPCC 2007). Every year about a third of this flux of CO₂ mixes into the oceans. In seawater the gas forms carbonic acid, reduces ocean pH, and undercuts growth and survival of many plankton, coral, and shellfish species. This weakens marine food webs that sustain many fisheries.

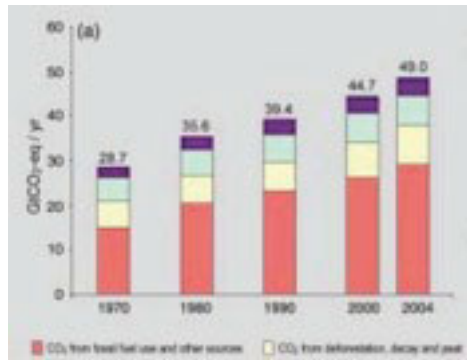
Protecting the productive capacity of the oceans is a critical challenge for the seafood industry. But this industry need not be merely a “canary in the coal mine.” Seafood producers and marketers have time and again demonstrated their ability to influence ocean policy, and therefore have the potential to be a powerful constituency to address marine acidification.

Though acidification is global in scale, it is most acute in the North Pacific, where it has begun to affect near-surface waters (as shallow as to 100 meters) that feed Alaska’s major fish stocks. Fortunately, this region is comparatively well positioned to confront the problem proactively. With strong research institutions and effective harvest management, Alaska fisheries generate more than half the U.S. catch and represent a leading voice in the world seafood industry.

We have convened major producers and vessel owners in the region, brought in scientists and carbon policy experts to explain the problem and potential solutions, and recommended that the industry pursue several policy goals:

- **Reduce global emissions of CO₂.**

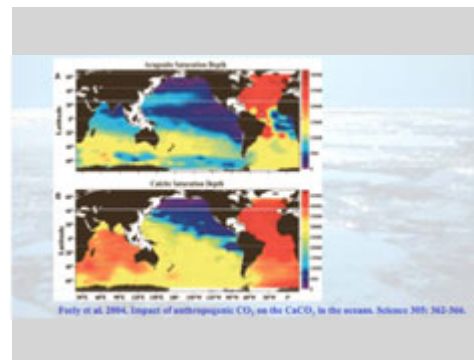
The future of marine fisheries depends on achieving this goal. The seafood industry is a small contributor to total global emissions, but it can be a powerful advocate for sound carbon policies. To ensure its credibility in this vital task, we are also encouraging the industry to tackle its own CO₂ emissions.



Rising Emissions Global human emissions of carbon dioxide—mainly from fossil fuels (red)—grew about 80% from 1970 to 2004. Other CO₂ (tan) includes effects of deforestation and other land-use changes, plus natural decay. Pale blue and purple: other GHGs. (IPCC 2007)

- **Boost research on impacts of increased ocean CO₂.**

The better they understand the problem, the more skillfully management authorities can conserve fisheries in a changing ocean—and the better prepared they will be to avoid unnecessary and costly “panic button” decisions.



Food web Impact Due to increased CO₂ concentrations, water corrosive to some prey organisms comes to within 100 meters of the surface in the North Pacific (Feeley et al 2004)

- **Boost research on “green” energy technology and strategies for adapting seafood production.**

Meeting rigorous emissions-reduction goals will require development of technologies to produce carbon-neutral energy, to use it more efficiently, and to scour and safely sequester CO₂ from air and sea. At the same time, ensuring future seafood supplies may require adaptation. In a high-CO₂ world, some species are likely to thrive better than others, and some production and management systems may prove more resilient.

- **Identify and pursue appropriate economic incentives.**

Every industry, including seafood, will face costs to curb emissions, but returns can also be substantial. Fortune 500 companies already report cost savings from climate initiatives that reduce their fuel bills. They also are now promoting a U.S. national policy that will expand markets for carbon credits. Creating the right incentives now may speed progress in emissions reduction and, at the same time, foster new opportunities on the waterfront.

We are now working with the industry in a variety of ways to implement these recommendations.

SFP STAFF AND OPERATIONS



Founded in 2006, The Sustainable Fisheries Partnership (SFP) is a nonprofit project that is fiscally sponsored and legally organized under the Trust for Conservation Innovation, a nonprofit, tax-exempt organization under Section 501(c)(3) of the USA Internal Revenue Code.

SFP is growing rapidly yet we are committed to being a lean and nimble organization. To do this, we tap experts that are based in the field and work in the fisheries we engage and advise. We utilize the best available technology to accelerate our work and to keep costs low. We welcome your support for SFP. Your donation will make a critical difference in how quickly and effectively we can restore key fisheries worldwide.

Support SFP

Donations may be made out to the:

Sustainable Fisheries Partnership
c/o: Trust for Conservation Innovation,
423 Washington Street, 5th Floor
San Francisco, CA 94111 USA.

You may also contribute online:

www.trustforconservationinnovation.org/sfp.html

"Our industry needs to take care of seafood sustainability, as the bedrock of our businesses. We can achieve a lot working with each other and NGOs like the Sustainable Fisheries Partnership."

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