

Target 75 Sector Update: Coldwater Crab





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SFP's [Target 75 \(T75\) initiative](#) has set a goal to see that 75 percent of the world's seafood production is considered sustainable or making regular, verifiable improvements by 2020. To simplify achieving and measuring progress toward this goal, SFP has divided the world's fisheries and farmed seafood production into various "sectors," defined by groups of species. While the sectors as a whole do not cover the entirety of the global seafood industry (e.g., some high-volume species groups such as carp, milk fish, and some shellfish are not included), those included represent a substantial proportion of the commercial seafood production of importance to markets currently demanding sustainability.

For the purposes of this analysis, we define a fishery as "sustainable" if it is Marine Stewardship Council (MSC) certified or green-listed in SFP's Metrics tool. We define a fishery as "improving" if it is certified by one of the following programs: IFFO RS, ASMI RFM, Iceland Responsible Fisheries, Fair Trade USA; if it is under full assessment in the MSC program; or if it is in a fishery improvement project (FIP) that is making good progress (i.e., with a progress rating of A, B, or C using SFP's FIP evaluation tool).

In this report, SFP provides information on the current status of the sector in terms of volumes coming from sustainable and improving fisheries, and, most importantly, we map out a path to close the gap to Target 75. We base the analysis on a blend of data and expert opinion on priority fisheries. SFP obtained production volumes and additional information relevant to this analysis from the FAO FishStat database, relevant countries' national statistics, and the respective certification programs' websites and certification reports (e.g., MSC, ASMI RFM). Trade data provide a guide to how much of the production goes to markets that are highly engaged in sustainability (e.g., EU, US), markets with activities that engage in improvements (e.g., Brazil, China, Indonesia, Japan), and markets with little evidence of engagement in sustainability or immediate plans to engage in improvements (e.g., Nigeria, Vietnam). Such trade data provide some insights into the likely influence key markets have, but is combined with expert opinion and information on the structure of production in each country, in order to determine whether a fishery is a candidate to contribute to the Target 75 initiative's goal.

Coldwater Crab Sector

SFP's coldwater crab sector comprises all crabs from coldwater regions and waters, as well as deep-sea crabs from tropical/temperate regions. All production is from wild fisheries. In terms of species and families, this translates into: king crabs; hair crab; rock, edible, Jonah, and Dungeness crabs; deep-sea red crabs; queen, tanner, and snow crabs; spinous spider crabs; velvet swimcrab; green crab; portunus swimcrabs from temperate and coldwater countries (the majority of portunus swimcrabs are found in warmwater environments and are considered in the swimming crab seafood sector); giant stone crabs; and marine crabs nowhere else identified from coldwater and temperate regions. Coldwater crabs are generally bigger in size than crabs from the remaining crab sectors and are mostly traded frozen, although some smaller volumes are also traded chilled, prepared, or preserved. Most production comes from industrial pot and trap fisheries from the North Pacific and Atlantic oceans, operating within exclusive economic zones (EEZs), and also in international waters. There is also some production from a variety of fishing gears, including stow nets, bottom trawls, gillnets, and longlines.

Global Supply and Patterns of Trade

- According to the FAO, total global production of coldwater crab in 2014 was 412,000 tonnes (rounded to nearest tonne).
- The top 10 producing countries produce 392,000 tonnes, 95 percent of global production (Figure 1).
- Out of the total traded volume of 397,000 tonnes in 2014 (International Trade Center, 2014 data compiled by California Environmental Associates as part of the OSMI initiative), we estimate that 28 percent was imported into the US, followed by Japan at 15 percent, the EU at 15 percent, and China at 14 percent. These estimates are based on bilateral trade data for all crab products overall, as trade data do not distinguish between crab species groups or commodities.
- Approximately 54 percent of global production sells in markets engaged in sustainability, with a further 23 percent going to countries with some engagement efforts underway (Figure 2).

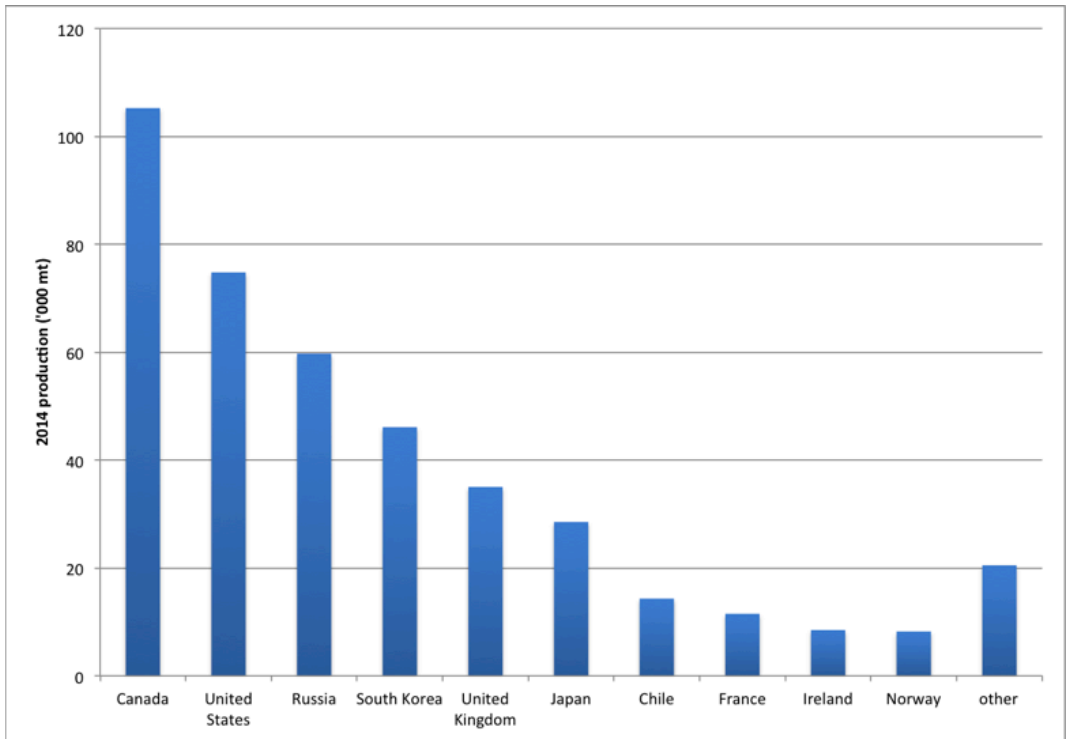


Figure 1: Top 10 coldwater crab-producing countries, 2014 production

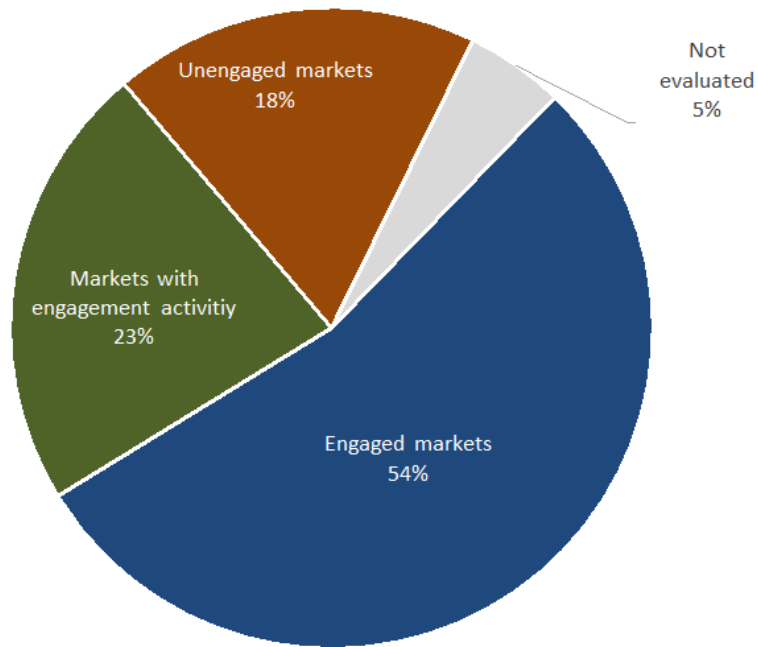


Figure 2: Global coldwater crab production by end-market level

Improvement Progress to Date

Based on 2014 data, 182,000 tonnes, or 44 percent of global production, are considered sustainable or improving (see Annex: Table 1).

- MSC Certified Fisheries
 - [Newfoundland & Labrador snow crab](#)
 - [Scotian Shelf snow crab trap](#)
 - [Gulf of St Lawrence snow crab trap](#)
 - [SSMO Shetland inshore brown and velvet crab](#)
 - [Australian west coast deep sea crab](#)
- MSC Full Assessment
 - [OSF Orkney brown crab creel fishery](#)
 - [Russia Barents Sea red king crab](#)
- Alaska Responsible Fisheries Management Certified Fisheries
 - [Alaska crab](#)
- FIPs with A-C rated progress
 - [Russian Far East Crab \(CCA\)](#)
 - [Barents Sea King Crab \(Odyssey Seafood\)](#)
 - [Orkney Creel Fishery \(OSF\)](#)
 - [Irish Brown Crab \(Community Supported Seafood\)](#)

Closing the Gap to Target 75

Existing Supply Chain Leverage and Interest

The primary target fisheries for improvement are those in FIPs not making good progress, those that existing supply chain roundtable participants have already identified as of-interest, and those that SFP believes are likely candidates for improvement projects. These fisheries account for 88,000 tonnes of production, 21 percent of the global total (see Annex: Table 2).

- Supply Chain Roundtables
 - SFP facilitates the Russian Far East (RFE) Crab Supply Chain Roundtable (SR), which focuses on monitoring sustainability status and issues relating to RFE crab stocks and discusses actions required to engage local producers and the supply chain in the work on fisheries improvements, in order to ensure long-term availability of RFE crab on domestic and international markets. Leverage from the RFE Crab SR has played a role in the progress made via the previously mentioned RFE Crab FIP, which now includes 99.9 percent of the RFE coldwater crab harvest.

Thus, while there are no additional fisheries under their purview that must be brought into FIPs, the RFE Crab SR's leverage is extremely important in ensuring that the improving RFE crab fisheries continue to improve or obtain MSC certification.

- Other Likely Candidates for Improvement Projects
 - o There are a number of US, UK, and Canadian crab fisheries that we believe may also be sustainable or improving, or would be good candidates for MSC full assessment or FIPs (based on reporting from [the Monterey Bay Aquarium's Seafood Watch Program](#) or closely related fisheries that are in MSC FA or FIPs). Buyers of these products should encourage the fisheries to enter MSC full assessment or launch a FIP to publicly verify sustainability or improvement efforts.

Urgent Additions Requiring New Supply Chain Leverage

Between fisheries that are already sustainable or improving and FIPs that we believe the existing supply chain leverage will be able to mobilize, we account for 65 percent of global production (summed totals of Tables 1 and 2).

Target 75 can only be achieved by expanding formal improvement efforts to European and Japanese fisheries (see Annex: Table 3). It is likely that new supply chain leverage will be required to move these fisheries toward sustainability.

Improvement Opportunities and Challenges

The vast majority of North American and European coldwater crab remains in domestic markets (which are already highly engaged in sustainability) or is exported to other highly engaged markets. Buyers of these coldwater crabs should request that their suppliers immediately engage in MSC full assessment or a FIP.

Developing improvement efforts in Japan may be more difficult, as the vast majority of Japanese coldwater crab production remains in the domestic market, which is just beginning to engage in sustainability.

Summary

Approximately 44 percent of the global coldwater crab production is considered sustainable or improving. While that still leaves a distance to go, a great deal of the remaining coldwater crab is produced and consumed in markets already engaged in sustainability (the US, Canada, and Europe). While purchasing leverage exists, very little is being applied to improve or publicly document sustainability at this time. New or increased effort by buyers in these markets is required to activate supply chain leverage over the additional fisheries that are needed to close the gap to T75. Substantial progress toward T75 could be made in a short amount of time if buyers of these products would request that their suppliers immediately engage in MSC full assessment or a fishery improvement project.

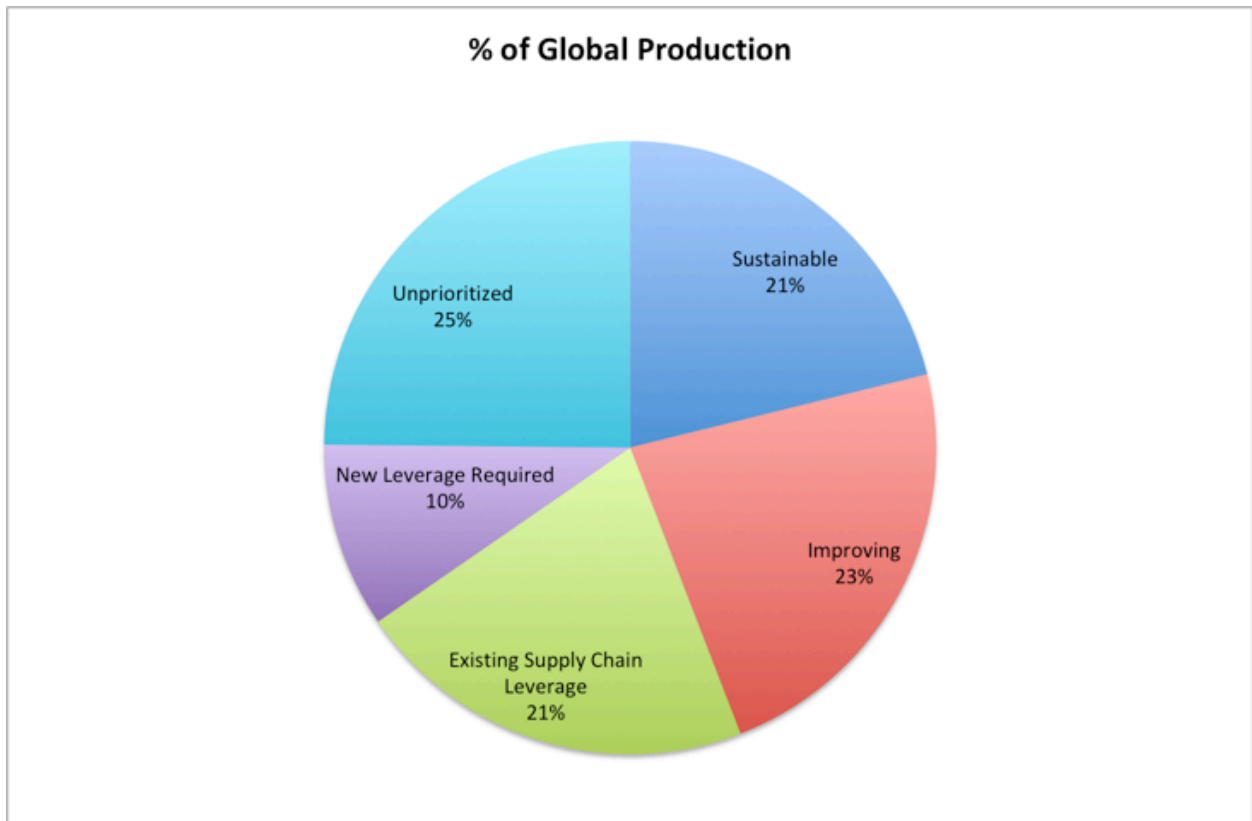


Figure 3: Strategy to reach Target 75 for the coldwater crab sector

Annex: Progress toward Target 75 goal

The following tables show key figures in gauging the progress of global coldwater crab production toward the Target 75 goal. The table format will be reprised in future reports with updated figures.

Table 1: Volume considered sustainable or improving

T75 Category	Volume (mt)	% of Global Production
Sustainable: MSC-C or FS Green	87,200	21.2%
Improving: MSC-FA or other certification	39,710	9.6%
Improving: FIPs (rated A-C)	55,050	13.3%
Total	181,960	44.1%

Table 2: Target coldwater crab fisheries using existing supply chain leverage and interest

Production Source	2014 Landings (mt)	% Global Production	Improvement Outlook
US, Dungeness crab	24,740	6.0%	All the US fisheries are rated as a Good Alternative by Monterey Bay Aquarium Seafood Watch.
US, Jonah crab	7,730	1.9%	This fishery is rated as a Good Alternative by Monterey Bay Aquarium Seafood Watch.
US, tanner crab (Eastern Bering Sea and Gulf of Alaska)	4,220	1.0%	This fishery is rated as a Best Choice by Monterey Bay Aquarium Seafood Watch.
US, golden king crab (Aleutian Islands)	2,890	0.7%	This fishery is rated as a Best Choice by Monterey Bay Aquarium Seafood Watch.
UK, edible crab (non-certified or full assessment volume)	29,710	7.2%	Edible crab in some parts of the UK are already MSC-certified or in full assessment.
Canada, queen crab (non-certified volume)	9,790	2.4%	Queen crab in most parts of Canada are already MSC-certified.
Canada, Atlantic rock crab	4,710	1.1%	This fishery is rated as a Good Alternative by Monterey Bay Aquarium Seafood Watch.
Canada, Dungeness crab	3,860	0.9%	This fishery is rated as a Good Alternative by Monterey Bay Aquarium Seafood Watch.
Total	87,650	21.2%	

Table 3: Additional fisheries that must be engaged to close the gap to T75

Production Source	2014 Harvest (mt)	% Global Production
France, edible crab	6,130	1.5%
France, spinous spider crab	4,760	1.2%
Ireland, edible crab	7,120	1.7%
Norway, edible crab	4,630	1.1%
Japan, red snow crab	17,610	4.3%
Total	40,250	9.8%