

# 2023

## T75 Sectors Status Update



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# SFP TARGET 75

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## 2023 T75 SECTORS STATUS UPDATE



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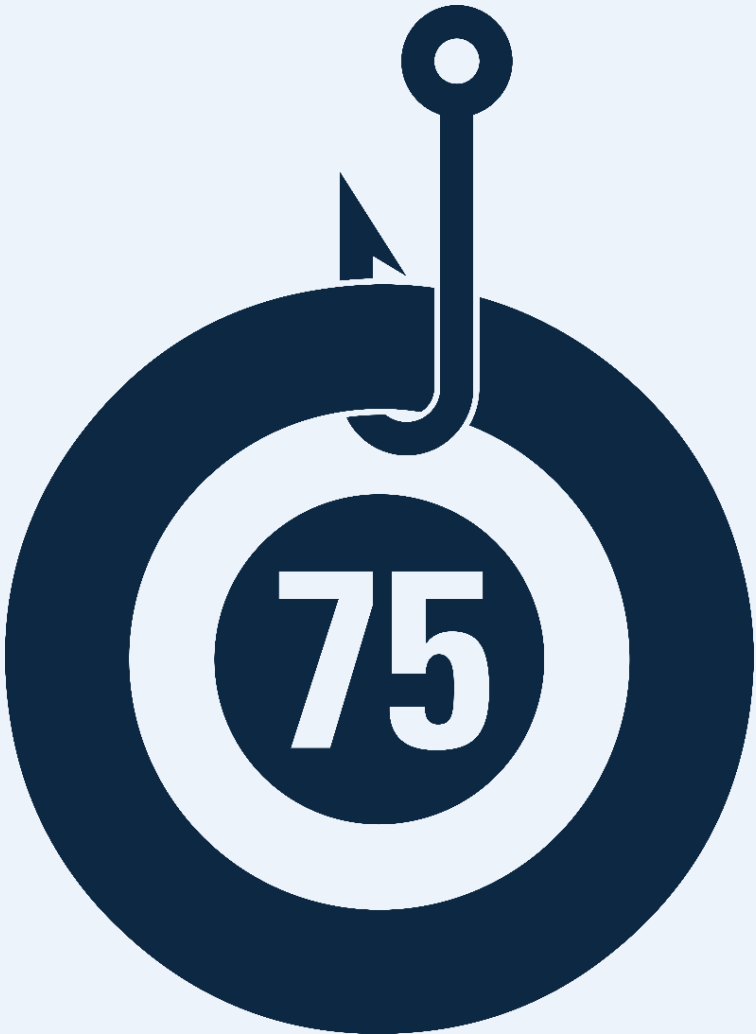
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# THE TARGET 75 INITIATIVE

Sustainable Fisheries Partnership (SFP) applies a sectoral approach to its mission of making actionable information available to the supply chain, in order to leverage market forces to achieve improvements in fisheries. Seafood sectors may be defined in terms of the shared biological characteristics of harvested species, as well as their role in defined markets.

**In 2017, SFP launched the Target 75 (T75) initiative**, as a dedicated and concrete benchmark on the way to our ultimate goal of 100% sustainable seafood. **T75 aims to ensure that 75% of seafood (by volume) in 13 key sectors is either sustainable or making regular, verifiable improvements.** Together, these T75 sectors cover most of the main types of seafood consumed in North America and Europe, and a significant portion of what is consumed in Japan and Oceania.



# SCOPE AND OBJECTIVES

Similar to previous years, this report presents a concise update on the progress made in each seafood sector toward the 75% goal, specifically in terms of the volume of production that is already considered sustainable or improving. Additionally, the report highlights significant changes in production sources and provides the latest trends in production and trade.

For the purposes of this analysis, we define a fishery as "sustainable" if it holds Marine Stewardship Council (MSC) certification or is green-listed in SFP's [Seafood Metrics tool](#). A fishery is considered "improving" if it is certified by one of the following programs: MarinTrust, Certified Seafood Collaborative (CSC) RFM, Iceland Responsible Fisheries, or Fair Trade USA; if it is undergoing full assessment in the MSC program; or if it is part of a fishery improvement project (FIP) that has made substantial progress (rated as A, B, or C) or was established within the last 12 months and is still unrated, as evaluated by [SFP's FIP Evaluation Tool](#). In the case of farmed production, improvement is defined by certification from programs such as the Aquaculture Stewardship Council (ASC), Best Aquaculture Practices (BAP), or GlobalG.A.P.'s GCN, or by involvement in a formal aquaculture improvement project (AIP).

Production data pertains to 2021 and is sourced from the Regional Fisheries Management Organizations (RFMOs) for tuna, while all other sectors rely on data from the FAO FishStatJ. Status in terms of certifications, FIPs, and AIPs refers to August 2023.



Salmon farm in Southern Chile © Salmonexpert



Fisherman carrying small tuna on the beach, Tanzania. © Shutterstock

## DISCLAIMER

This report was prepared with information available from multiple sources, accessed in August 2023. The report is not intended to be a comprehensive review of the sector, but rather a summary of progress against the Target 75 initiative, with some selected key highlights and improvement needs for each of the sectors covered. The trade analysis is based on FAO bilateral trade data, which may not fully depict the full trade flows from the first exporter to the last end market of certain commodities. For more detailed information on seafood production, trade, or the status and attributes of particular certifications and improvement projects, the original sources should be consulted.

# CURRENT T75 OVERALL STATUS AND PROGRESS

## Production

- **The Target 75 (T75) initiative encompasses a significant portion of coastal countries worldwide.** In 2021, the combined wild and farmed production from the 13 seafood sectors covered by T75 amounted to approximately 91 million tonnes.
- This accounts for roughly half of global seafood production, excluding seaweeds, plants, marine mammals, and other species. Wild capture constituted 77% of total production, while aquaculture contributed 23%.
- Asia dominates production within the scope of T75, representing 53% of global production. China leads with a share of 16%, followed by Indonesia (8.7%) and Viet Nam (6.1%) as the other prominent Asian contributors ([Figure 1](#)). However, in certain sectors such as wild whitefish, small shrimp, and salmon, production from other continents, namely the Americas and Europe, assumes a more significant role.
- Among the 13 seafood sectors covered by the T75 initiative, the largest in terms of production are marine ingredients (48.5 million metric tons (MMT) in 2021), large shrimp (10.1 MMT), farmed whitefish (tilapia/pangasius) (9.1 MMT), and wild classic whitefish (7.4 MMT) ([Figure 2](#)). Collectively, these four sectors account for 84% of production under the Target 75 initiative.

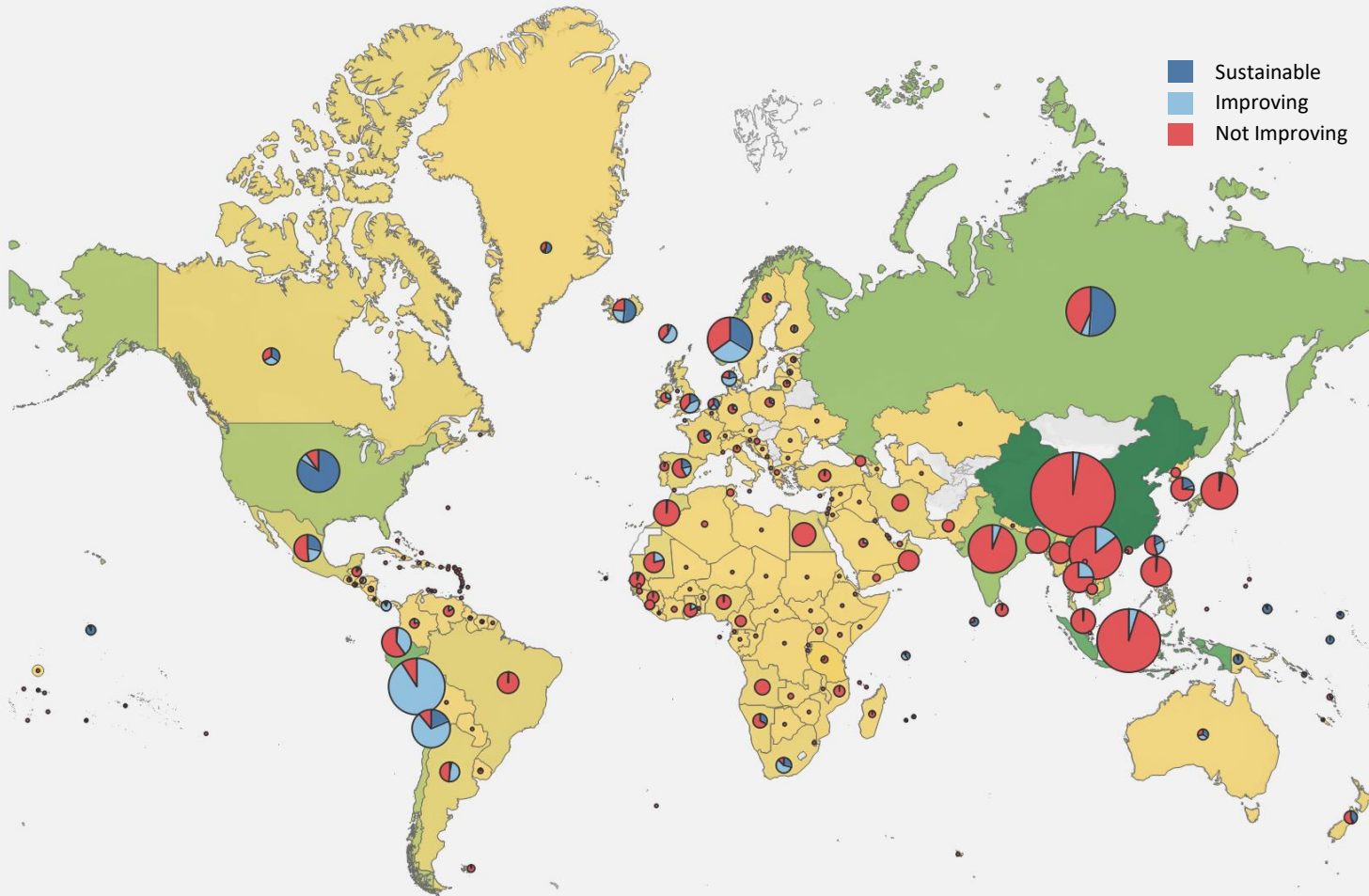
## Target 75 status

- Currently, **approximately 39.4 million tonnes, which accounts for 32.9% of the total production covered by T75, originates from fisheries that are classified as either sustainable** (e.g., MSC-certified) **or improving** (e.g., under a fishery improvement project (FIP) or aquaculture improvement project (AIP)).
- Most of the sustainable/improving production comes from sectors or sub-sectors that have either achieved or are making progress toward the 75% target. These include wild classic whitefish (80.8%), marine Ingredients - classic reduction (75.0%), small shrimp (74.6%), , salmon (71.6%), and large pelagics - mahi (66.2%) ([Figure 2](#)).
- There is a **general upward trend in the production that is classified as improving or sustainable across most seafood sectors**. However, **certain sectors, such as large shrimp and octopus, still lag in achieving the target**. This may be due to insufficient efforts to catalyze improvement, which could be attributed to factors such as limited market leverage or industry interest.
- In terms of regional performance, most production sources in the Americas (North and South, specifically in the Pacific area) and Europe (particularly in Northern Europe) are already either certified or involved in FIPs/AIPs. However, in Asia and Africa, a significant portion of production originates from sources that show no evidence of improvement.

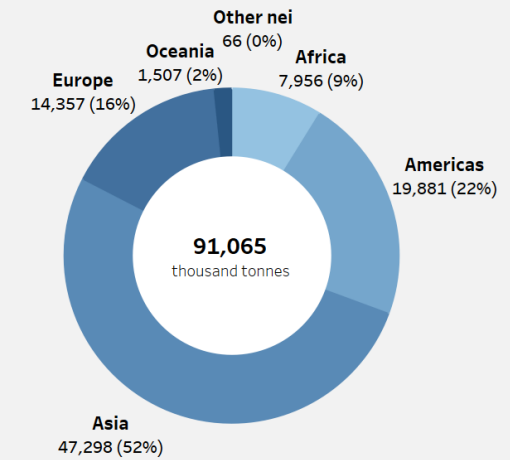


Details on production, specific status and progress by sector, country, species and other criteria, are available in the sections on the following pages or in the [Overall T75 progress and 2023 status by sector](#) Tableau dashboards.

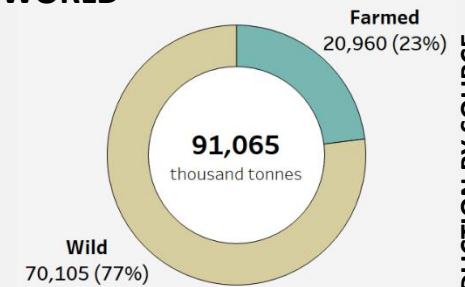
# OVERALL T75 STATUS BY REGION



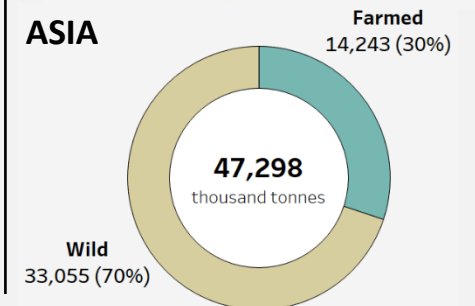
## PRODUCTION BY CONTINENT



## WORLD

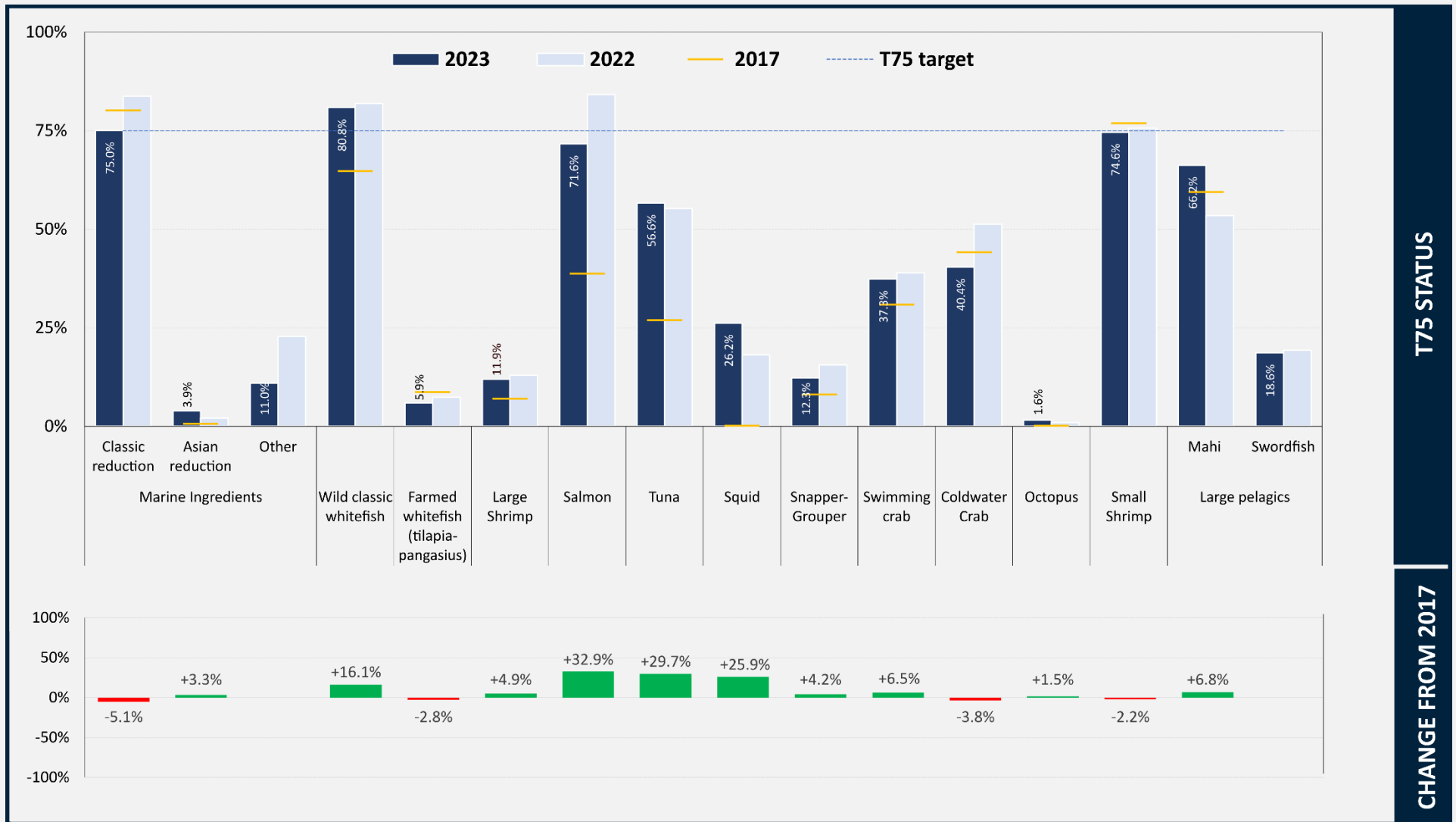


## ASIA



% OF TOTAL PRODUCTION BY SOURCE

**Figure 1 |** (Left) 2023 Target 75 coverage, with countries color-coded based on the volume of total 2021 production from the seafood sectors included in the initiative. The size of the pie charts in the map corresponds to the total 2021 production, while the slices represent the percentage of each country's production in the T75 sustainability category. (Top right) 2021 production by continent (in thousand tonnes) for the seafood within the scope of Target 75. (Bottom right) Production by source, distinguishing between wild capture and farmed (aquaculture), both globally and for Asia.



**Figure 2 |** (Top) The percentage of volume that is considered on track to 75% sustainable and improving, in relation to total sector production for each sector. The data is presented for the years 2023 (current, August 2023; dark blue bar), 2022 (September 2022; light blue bar), and 2017 (yellow line). The blue dashed line represents the 75% target. (Bottom) Changes in the percentage of volume that is categorized as sustainable or improving between 2017 and 2023. Please note that the “Marine ingredients – Other” and “Large pelagics – Swordfish” sectors were added to the initiative after 2017 and are thus not included in the second chart.

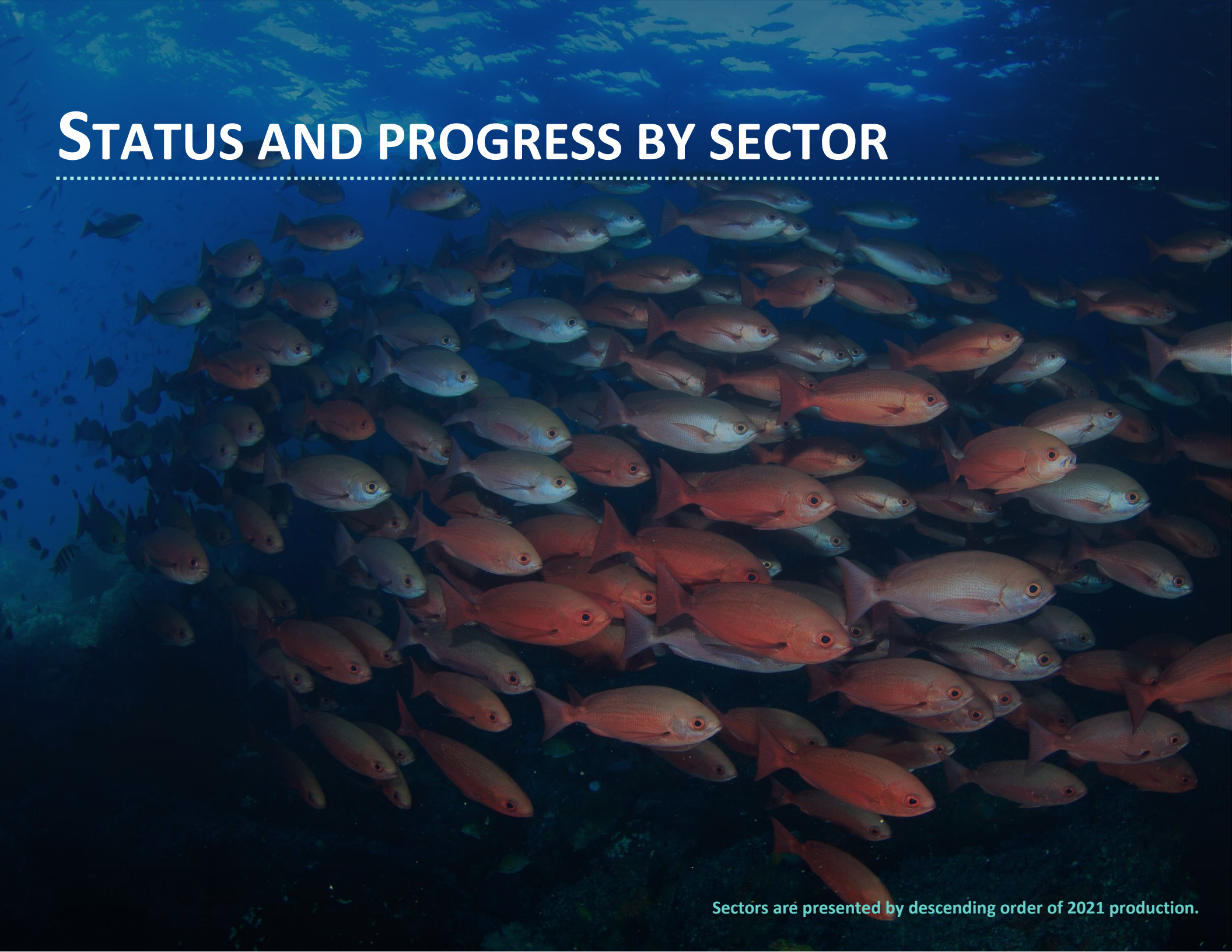
T75 STATUS

CHANGE FROM 2017



# STATUS AND PROGRESS BY SECTOR

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Sectors are presented by descending order of 2021 production.

# MARINE INGREDIENTS



## Sector definition and scope

- 🕒 Marine ingredients are the largest sector of the Target 75 initiative, totaling 48.5 MMT and accounting for more than half of global wild fish production.
- 🕒 This sector encompasses various types of fisheries, ranging from directed small pelagic fisheries in the Eastern Pacific and Atlantic oceans to multispecies trawl fisheries in Southeast Asia. It also includes other fisheries that contribute to the production of fishmeal (FM), fish oil (FO), and other marine ingredients like surimi.
- 🕒 Due to the sector's complexity and the diverse sources used for marine ingredients, which vary by region, species groups, and fisheries, it can be divided into three distinct subsectors:
  - **Classic reduction:** In this subsector, we have a clear understanding of the fisheries involved, and the majority of the production is used for fishmeal and fish oil.
  - **Asia reduction:** This subsector is highly complex, involving hundreds of species that are used both for marine ingredients and human consumption. In this case, all the production is assumed to fall under the subsector scope because it originates from the same fisheries, regardless of its ultimate use.
  - **Other:** This subsector includes production from fisheries primarily intended for human consumption, but where certain portions may also be used for fishmeal and fish oil due to market dynamics, regulations, etc. For example, some Northeast Atlantic fisheries like mackerel or herring fall into this category.

## T75 status and current strategic priorities

- 🕒 The **marine ingredients sector as a whole remains far from reaching the 75% target, with only 26% of production classified as sustainable/improving.** This can be attributed to the sector's broad scope, which encompasses a significant portion of global wild production. Additionally, some regions and fisheries within the sector have limited demand for sustainability, resulting in varying levels of progress and outcomes across the subsectors.
- 🕒 Similar to 2022, there are three distinct scenarios in terms of progress toward the 75% target for each subsector (**Figure 2, p. 6**):
  - **“Classic reduction”** has already achieved the 75% target. This success is primarily driven by market pressure, prompting major fisheries to participate in certification programs or join fishery improvement projects (FIPs) to meet procurement requirements.
  - **“Asia reduction”** fisheries’ production represents half of the sector but continues to have minimal evidence of improvement initiatives. Only a small percentage has recently joined FIPs, such as the multispecies pilot fisheries in Thailand and Viet Nam, or part of the Indian oil sardine fishery.
  - **“Other”** is less than halfway toward the 75% target. Given its global scope and coverage of various species groups, the sustainability status varies depending on the specific species, fishery, and region of the globe.
- 🕒 Achieving the 75% target for the entire sector remains a challenging task, particularly as it requires significant progress in mobilizing fisheries production in Asia. Learn more about SFP’s 2024 Target 75 strategy and prioritized fisheries [here](#). A more detailed update for each subsector is provided in the following sections.

# MARINE INGREDIENTS

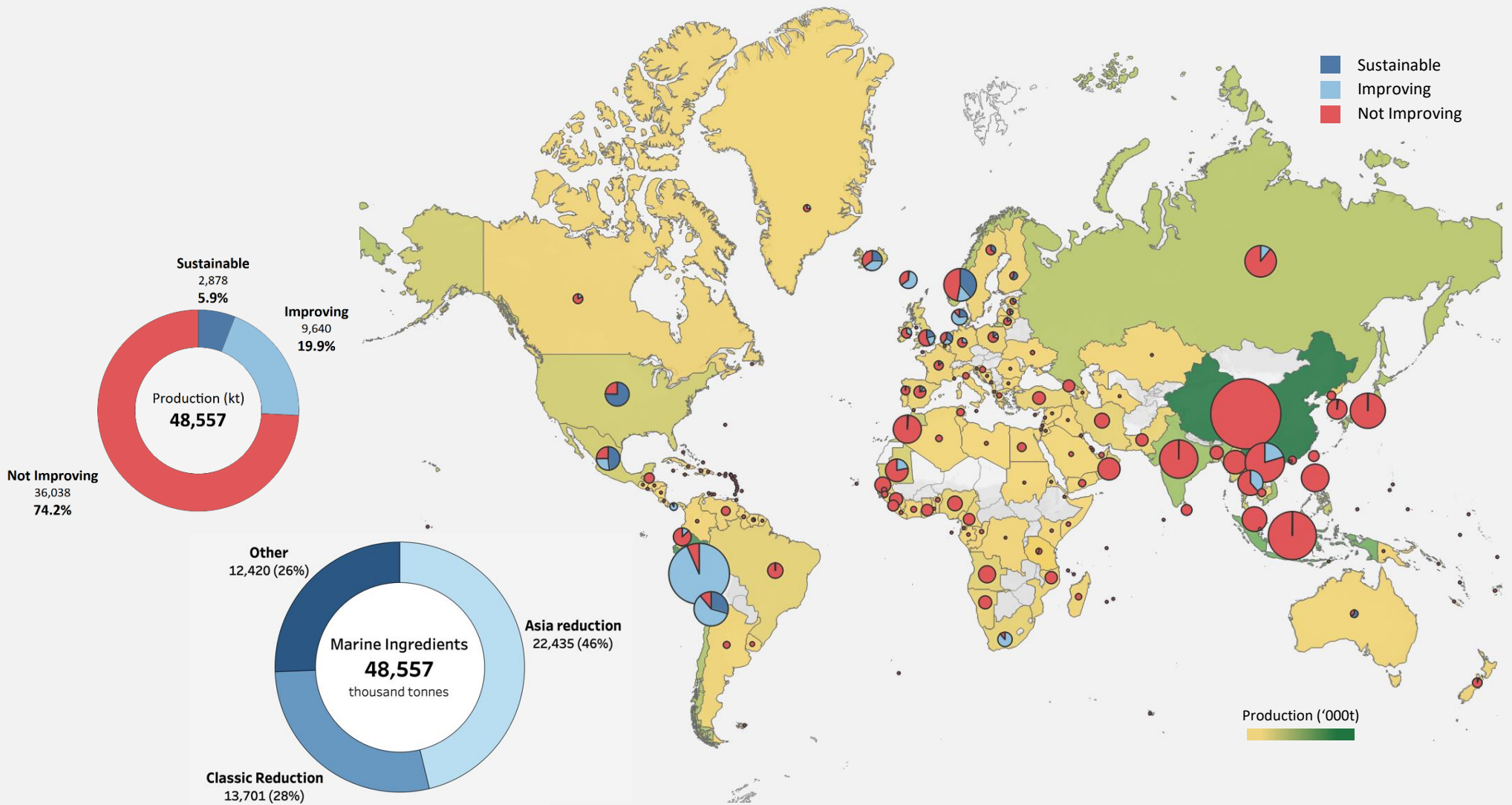


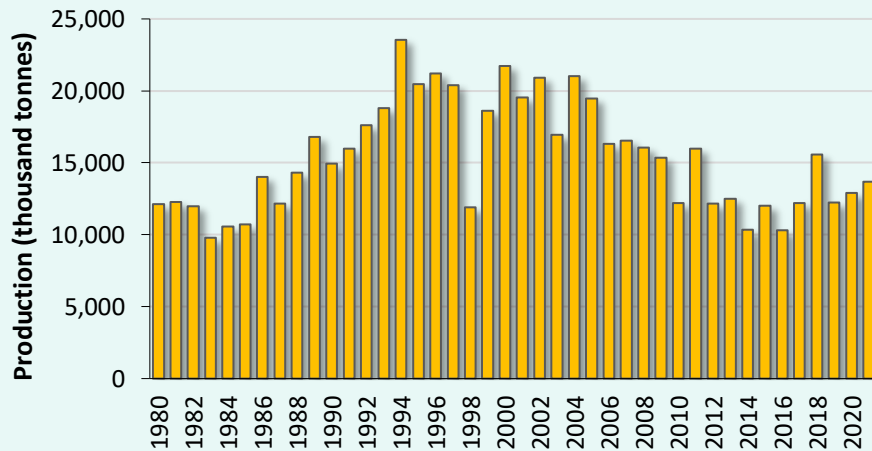
Figure 3 | Current Target 75 status (top left), production by marine ingredients subsector (bottom left), producing countries, and percent of volume by country that is considered either sustainable or improving (map).

# MARINE INGREDIENTS: CLASSIC REDUCTION



Atlantic menhaden  
(*Brevoortia tyrannus*)

Figure 4 | Time series of global production volumes for the Classic Reduction subsector



## Production

- ⦿ This subsector comprises fisheries primarily reliant on whole-fish source fisheries from the Atlantic and Eastern Pacific oceans, which are particularly relevant to aquaculture feed (primarily for salmon feed).
- ⦿ Despite significant interannual variations, annual catches reached a peak in the mid-nineties, gradually declined until 2014, and have since been slowly increasing (Figure 4). Most recent (2021) catches were estimated at 13.7 million tonnes (FAO 2023b).
- ⦿ Anchoveta continues to be the most important species in this subsector, with catches of 5.9 million tonnes in 2021, all in the Southeast Pacific Ocean (i.e., accounting for 43% of total production). Other important species are blue whiting (9%), and European pilchard (8%), captured in the Northeast and Eastern central Atlantic, respectively.
- ⦿ The most important fishing countries are Peru (40% of total catches), Chile (12%), Morocco (6%), and Norway (5%). Combined, these countries represent almost two-thirds of the total production for classic reduction (Table 1).
- ⦿ Exports for marine ingredients commodities, including fishmeal (FM) and fish oil (FO), are difficult to depict by subsector. As such, the processed production of FM and FO, and respective trade dynamics, are covered in a separate section (below).

Table 1 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Peru	5,486.1	40%	96%
Chile	1,709.3	12%	93%
Morocco	829.6	6%	2%
Norway	681.2	5%	94%
Mexico	615.3	4%	93%
United States	549.5	4%	90%
Mauritania	479.0	3%	36%
Ecuador	404.1	3%	15%
Other	2,947.4	22%	49%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.



# MARINE INGREDIENTS: CLASSIC REDUCTION

## Status and recent progress against T75

- 🕒 **This sub-sector has currently reached the 75% target**, with an estimated 75.0% of the total production coming from fisheries considered either sustainable or improving per T75 criteria ([Figure 5](#)).
- 🕒 This achievement is primarily attributed to the continuous growth in fisheries either certified by the MSC program, approved by MarinTrust, or engaged in fishery improvement projects.
- 🕒 The most significant fisheries contributing to this success are the North-Central Peruvian anchoveta (4.8 million tonnes, 35% of the sub-sector: in a FIP and MarinTrust approved) and the NE Atlantic blue whiting (1.2 million tonnes, 9% of the sub-sector: in a multinational FIP).
- 🕒 The recent drop (c. 5%) in sustainable and improving production can be explained by both (1) a decrease in production of some of fisheries that are certified or in a FIP (e.g., NE Atlantic blue whiting, Mauritania small pelagics), and (2) by the suspension of some MSC-Certified fisheries (e.g., Baltic sprat) or FIPs (e.g., Morocco sardine).
- 🕒 Learn more about SFP's Target 75 strategy in 2024 and prioritized fisheries [here](#).

## SFP initiatives' updates

SFP's focus in the sector lies on actively engaging mid-upper and end markets in promoting improvements within fisheries supplying fishmeal and oil via the [Global Marine Ingredients Roundtable](#), to catalyze and support fishery improvement projects (FIPs), better understand and address urgent social issues and enhance social responsibility, and explore other strategies to improve the availability of sustainable marine ingredients. Below are some highlights and updates on recent activities in this subsector.

- 🕒 An FAO workshop on Sub-Saharan Africa's small pelagic fish was held in Accra (Ghana) in December 2023.
- 🕒 The Roundtable commissioned a human rights impact assessment in Senegal and Mauritania to better understand the situation on the ground, and to link the impacts in the small pelagic fish value chain in Senegal and Mauritania with the United Nations' business and human rights framework. The Track the Fish report highlighted that a responsible small pelagics industry has much potential to positively impact human rights of the local population: bringing stability to the fisheries in this region can support economic growth and provide stable employment for local populations in a place where it is sorely needed.
- 🕒 [Part 1 of the 14th edition of SFP's global sustainability overview](#) of the main Pacific and Atlantic fish stocks used for reduction purposes has been published.

# MARINE INGREDIENTS: CLASSIC REDUCTION

**SUSTAINABLE / IMPROVING**  
**75.0%** (-5.1% from 2017)

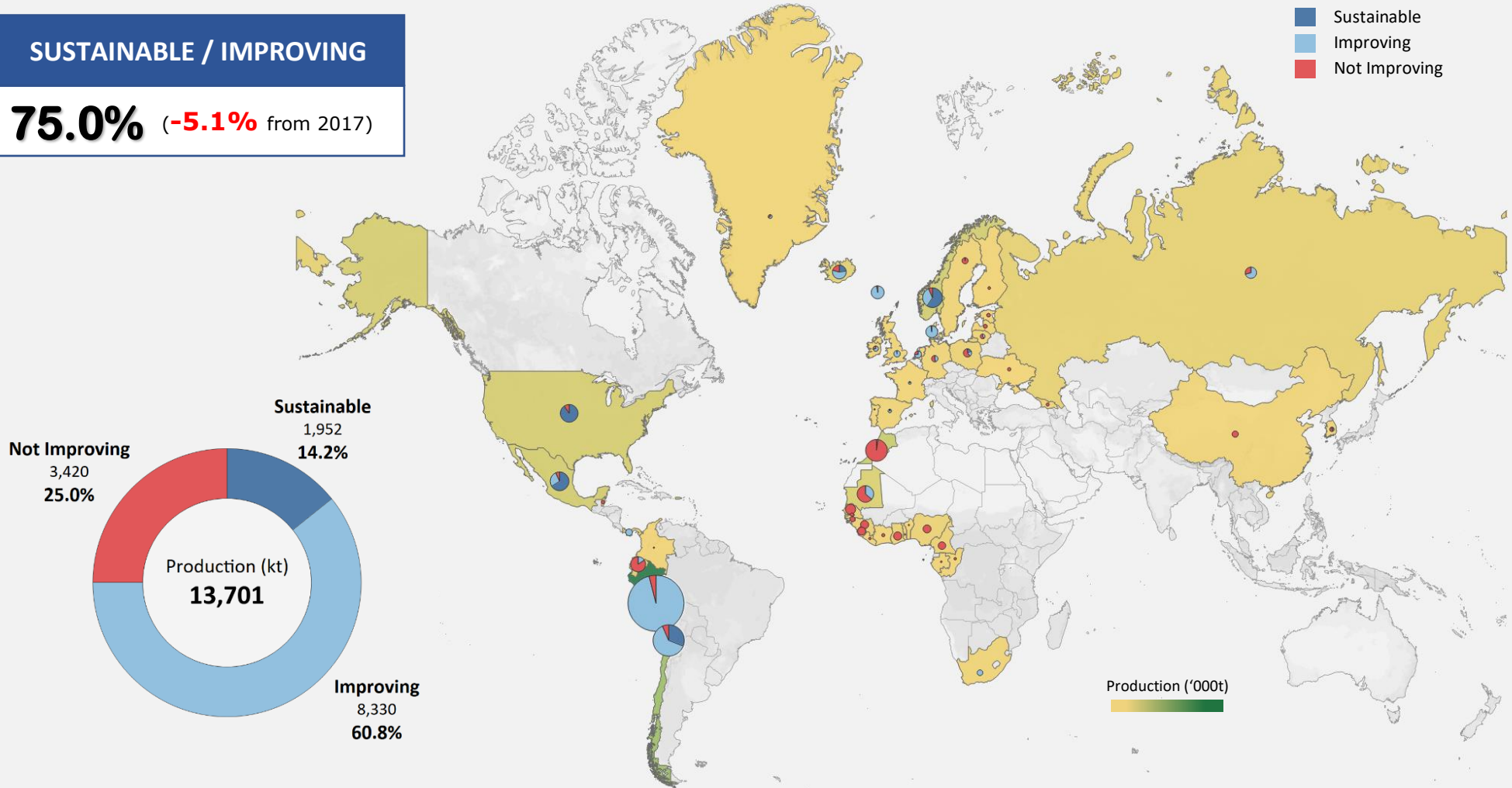


Figure 5 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# MARINE INGREDIENTS: ASIA REDUCTION



Indian oil sardine  
(*Sardinella longiceps*)

Figure 6 | Time series of global production volumes for the Classic Reduction subsector

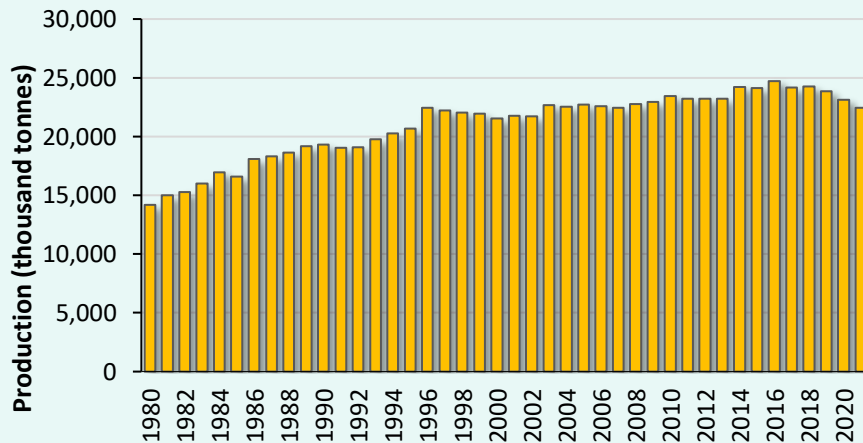


Table 2 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
China	7,464.6	33%	0%
Indonesia	3,528.2	16%	0%
Viet Nam	2,368.9	11%	20%
India	2,249.0	10%	0%
Japan	1,888.6	8%	0%
Philippines	1,164.3	5%	0%
Thailand	970.0	4%	39%
Malaysia	936.4	4%	0%
Other	1,864.9	8%	0%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- ⦿ **The Asia reduction subsector continues to contribute to approximately 50% of the global production within the marine ingredients sector.** However, as aforementioned, only a portion of the production from these fisheries is used for marine ingredients, such as shrimp feed and surimi.
- ⦿ Annual catches experienced slow growth until 2016 and have since been slowly declining. In 2021, total catches were estimated at around 24 million metric tons per year (**Figure 6**) (**FAO 2023b**).
- ⦿ With 7.4 million tonnes of catches reported in 2021, China is the most important fishing country (representing 33% of the subsector total catches). Indonesia (16%), Viet Nam (11%) and India (10%), are other relevant fishing countries (**Table 2**).
- ⦿ The catches are largely from multispecies trawl fisheries, and data reporting of capture at the species level remains a challenge in these fisheries. In 2021, unspecified species groups such as “Marine fishes nei” or “Scads nei” represented more than 60 percent of the total catches in this subsector (**FAO 2023b**).
- ⦿ Exports for marine ingredients commodities, including fishmeal (FM) and fish oil (FO), are difficult to depict by subsector. As such, the processed production of FM and FO, and respective trade dynamics, are covered in a separate section (below).



# MARINE INGREDIENTS: ASIA REDUCTION

## Status and recent progress against T75

- ⦿ **Asia reduction currently demonstrates minimal evidence of improvement initiatives, as only 3.9% of the total production is sourced from fisheries considered to be improving (Figure 7).** This supply is derived mostly from two multispecies pilot fisheries in Thailand and Viet Nam, and the Indian oil sardine fishery in Goa and Maharashtra.
- ⦿ To achieve the 75% target, it is necessary to engage the remaining production from Viet Nam, Thailand, and other relevant Asian countries in improvement initiative

## SFP initiatives' updates

IFFO's Technical Director Dr. Brett Glencross hosted a one-hour InFocus discussion on 31 August 2023 featuring SFP Program Director Dave Martin, who provided an update on several ongoing projects in Southeast Asia.



Landing fish from mixed trawl fisheries in Thailand.  
© Dave Martin

# MARINE INGREDIENTS: ASIA REDUCTION

SUSTAINABLE / IMPROVING

**3.9%** (+3.3% from 2017)

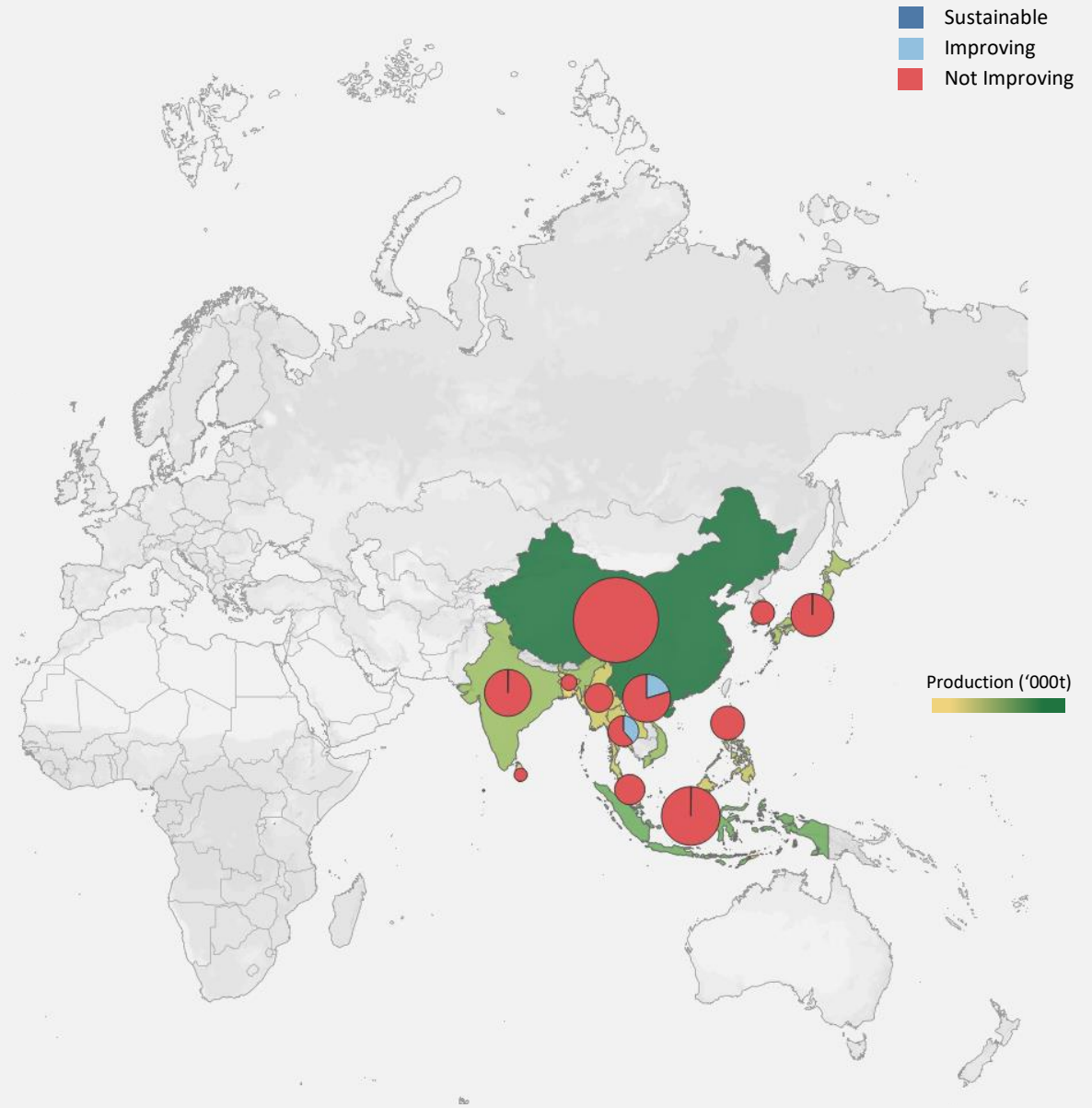
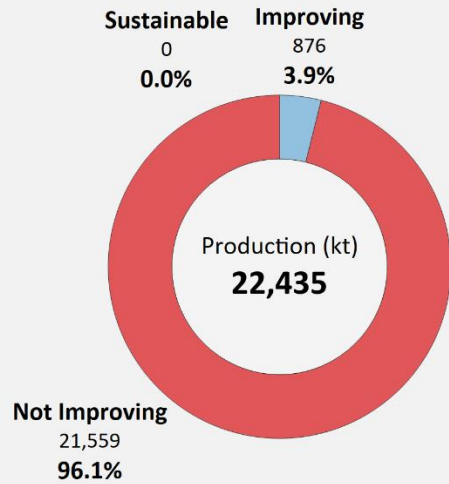
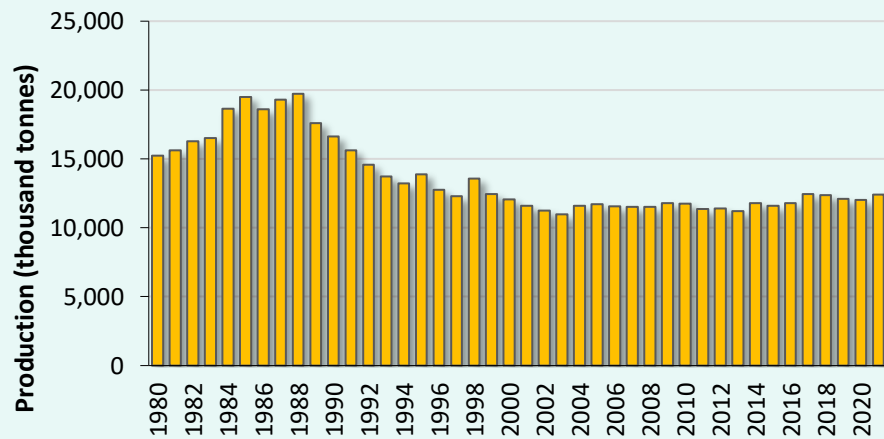


Figure 7 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# MARINE INGREDIENTS: OTHER



Figure 8 | Time series of global production volumes for the Other subsector



## Production

- Annual catches from the species included in this subsector experienced a peak in the late 1980s, followed by a decline until the mid-2000s, and have since remained stable at around 12 million tonnes (Figure 8).
- Most of the catches come from European countries, namely Russia (10% of total catches), Norway (8%), and Angola (4%), and Middle Eastern countries such as Oman (6%) and Iran (3%) (Table 3).
- Wild capture is predominantly comprised of other small pelagic species, such as Atlantic and Pacific herring (combined, accounting for 16% of total catches), Atlantic mackerel (9%), Indian oil sardine (5%), and Atlantic chub mackerel (5%).
- Most fish (50%) from this subsector is captured in the eastern Atlantic (FAO areas 27, 34 and 47) and Indian (16%) oceans (FAO 2023b).
- Exports for marine ingredients commodities, including fishmeal (FM) and fish oil (FO), are difficult to depict by subsector. As such, the processed production of FM and FO, and respective trade dynamics, are covered in a separate section (below).

Table 3 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Russia	1,287.7	10%	0%
Norway	944.1	8%	24%
Oman	751.8	6%	0%
Angola	446.0	4%	0%
Morocco	380.1	3%	0%
Brazil	363.4	3%	0%
Iran	339.6	3%	0%
United Kingdom	328.2	3%	30%
Other	7,579.7	61%	14%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

# MARINE INGREDIENTS: OTHER

## Status and recent progress against T75

- ⦿ This subsector is far from the 75% target, with **only 11% of production coming from fisheries considered sustainable or improving (Figure 9)**.
- ⦿ The sustainable or improving supply is coming mostly from North Atlantic and NE Pacific fisheries, namely from Europe and North America. Except for South Africa, for most fisheries and countries in Africa and Asia there is still no evidence of improvements.
- ⦿ Compared to 2021, there has been a significant increase in the improving/sustainable production. This was mainly due to the large volume NE Atlantic mackerel and herring FIP.
- ⦿ To reach the 75% target, the production from relevant fisheries and producing countries (e.g., Russia) would need to be mobilized into improvement initiatives.

## SFP initiatives' updates

No recent updates or highlights to report in this subsector.



# MARINE INGREDIENTS: OTHER

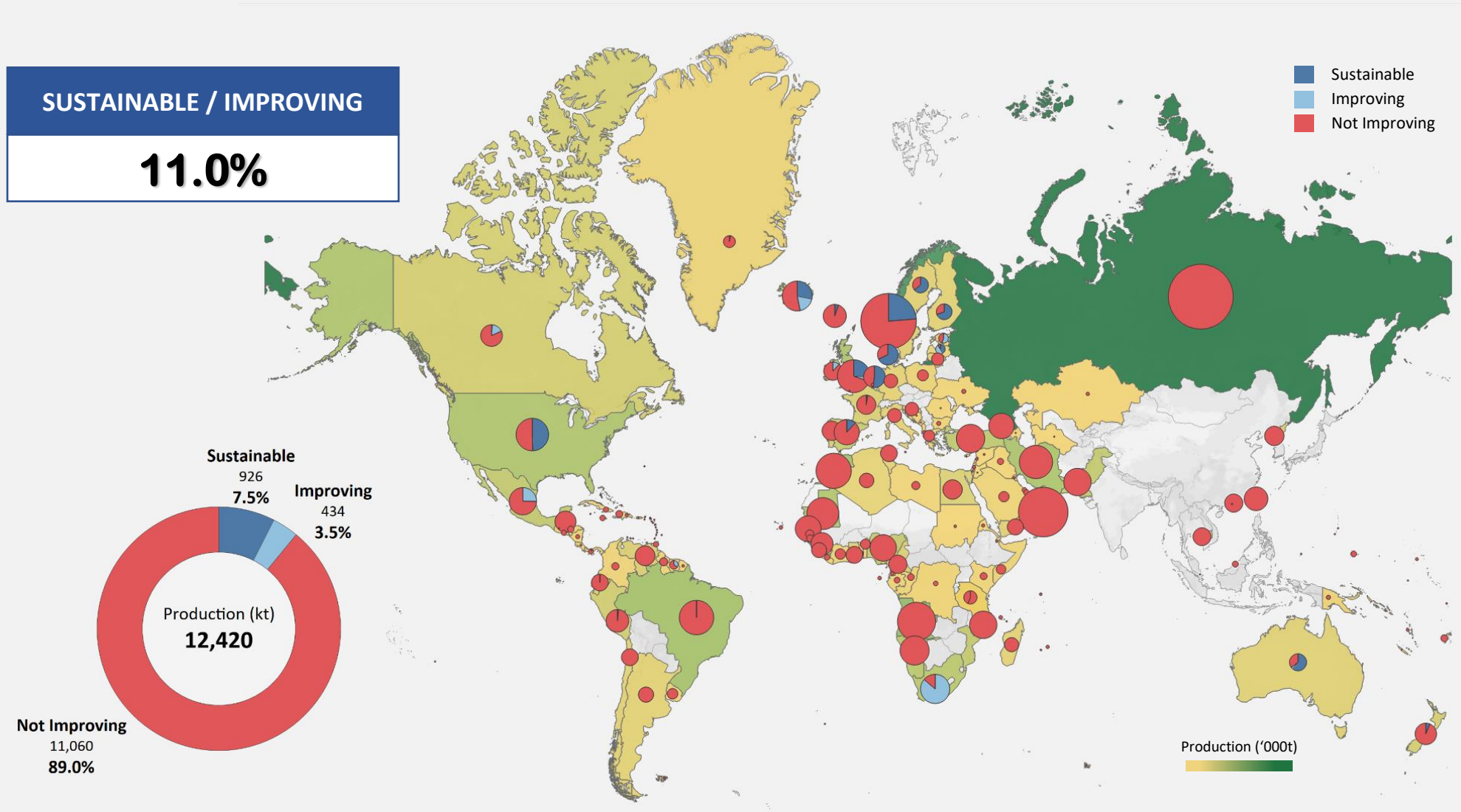


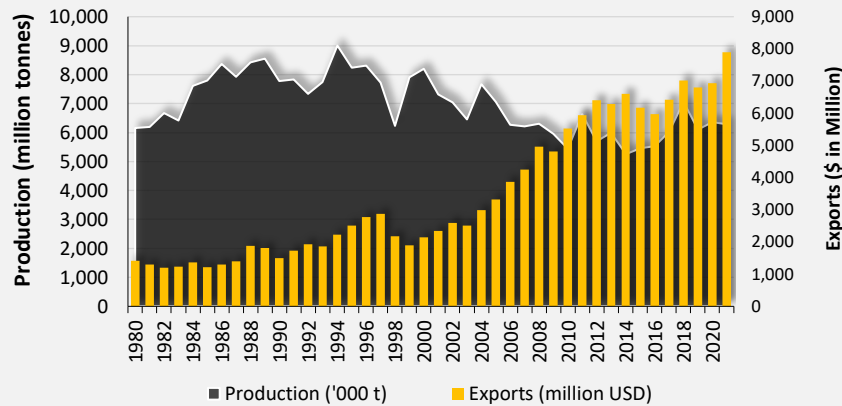
Figure 9 | Current producing countries and percent of volume by country that is considered either sustainable or improving.



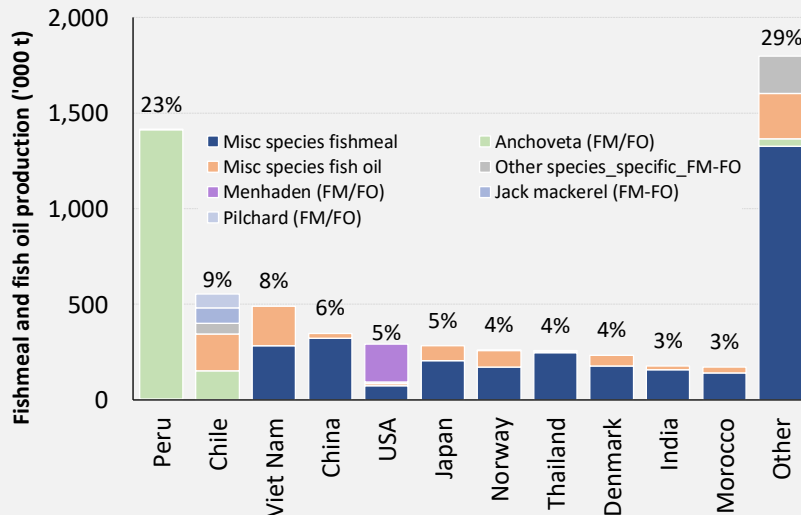
# FISHMEAL AND FISH OIL



**Figure 10 | Time series of fishmeal and fish oil production (area) and annual exports (bars), for the groups included in the Marine Ingredients sector**



**Figure 11 | 2021 production and percent of total production, by country and main FM/FO commodity**



- Processed production for marine ingredients, including fishmeal (FM) and fish oil (FO), is difficult to depict by subsector, and thus the analysis focuses solely on fishmeal and fish oil for the Marine Ingredients sector as a whole.
- For the analysis, only FM and FO coming from species groups that are potentially under the scope of the Marine Ingredients sector were considered.<sup>1</sup>
- Following a peak in in 1994 (at roughly 9 million tonnes), annual processed production of FM and FO showed a declining trend until 2010, and has been stable since, between 5 and 6 million tonnes per year (Figure 10) (FAO 2023d).
- Annual exports of fish meal and fish oil (FM/FO) by value have been increasing since the late 1990s, and reached an historical high in 2021, estimated at USD 7.9 billion (FAO 2023a).
- Peru stands out as both the largest producer and exporter, accounting for almost one quarter of total FM/FO production (mostly from anchoveta), and 30% of total FM/FO exports by value (2021 data) (Figure 11) (FAO 2023c).
- Other significant producers and exporters include Chile, the United States, Norway, and Denmark. China is both the largest importer of FM/FO and an important producer, suggesting that most of the production and imports are for domestic supply (FAO 2022c).

<sup>1</sup> Fishmeal and fish oil from groups such as sharks, marine mammals, flatfish or shrimp, is not considered here.

# FISHMEAL AND FISH OIL

**Table 4 |** Bilateral trade flows showing the main fish meal and fish oil exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer											Total 2021 exports (USD million)	% of total exports
	China	Norway	United Kingdom	Denmark	United States	Germany	Türkiye	Canada	Japan	Taiwan	Other		
Peru	67%	2%	0%	2%	1%	4%	0%	4%	4%	2%	14%	2,357.3	30%
Denmark	3%	56%	10%	0%	0%	4%	0%	4%	0%	2%	21%	616.8	8%
Chile	21%	0%	0%	4%	11%	5%	3%	2%	9%	3%	42%	567.8	7%
Norway	2%	0%	21%	14%	12%	4%	14%	2%	0%	1%	31%	386.3	5%
United States	31%	0%	1%	11%	0%	0%	1%	21%	3%	2%	30%	320.0	4%
Mexico	30%	0%	1%	7%	13%	5%	0%	10%	1%	3%	30%	279.7	4%
Viet Nam	75%	0%	0%	0%	0%	0%	0%	0%	2%	1%	22%	263.0	3%
Morocco	1%	3%	1%	1%	1%	4%	40%	0%	0%	2%	47%	246.5	3%
Iceland	2%	47%	12%	8%	8%	6%	2%	0%	0%	0%	14%	229.8	3%
Germany	0%	3%	5%	12%	0%	0%	1%	0%	0%	0%	79%	202.2	3%
China	0%	1%	17%	0%	26%	1%	0%	6%	5%	7%	39%	201.4	3%
Thailand	65%	0%	1%	0%	0%	0%	0%	0%	13%	3%	17%	163.6	2%
Russia	92%	0%	0%	0%	0%	0%	0%	0%	4%	0%	4%	151.8	2%
Spain	0%	0%	1%	1%	2%	7%	5%	0%	1%	0%	84%	145.2	2%
Mauritania	67%	0%	0%	3%	0%	0%	10%	0%	0%	0%	20%	143.7	2%
<b>% of total imports</b>	<b>31%</b>	<b>7%</b>	<b>4%</b>	<b>4%</b>	<b>4%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>35%</b>		



# LARGE SHRIMP

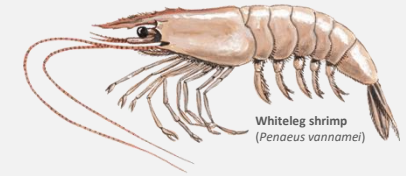
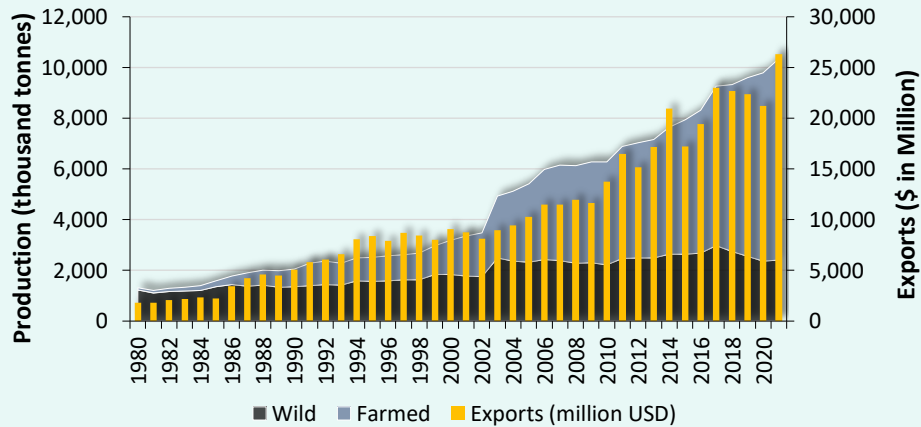


Figure 12 | Time series of Large shrimp production (area) and annual exports (bars)



## Production and trade

- Over the past two decades, there has been a consistent annual growth rate in global large shrimp production. Starting from approximately 3.3 million tonnes in 2000, production has tripled, reaching over 10 million tonnes by 2021. This considerable increase is primarily attributed to the rapid expansion of aquaculture, which now contributes to 77% of the total large shrimp production (Figure 12).
- The leading countries in farmed shrimp production are China (contributing to 34% of global production), followed by India (16%), Viet Nam (12%), Indonesia (12%), Ecuador (11%), and Thailand (5%). Thailand, historically the second-largest producer until 2010, experienced a significant decline in production in 2012 and has since remained relatively stable at 400,000 tonnes per year. Whiteleg shrimp (*Penaeus vannamei*) remains by far the most important large shrimp species (80% of global farmed shrimp production).
- The main capture countries for large shrimp are China (30% of catches), India (16%), Argentina (9%), and Indonesia (9%).
- Large shrimp exports show a rising trend since the early 2000s. India, Ecuador, and Viet Nam continue to be the primary exporters, collectively accounting for over 50% of exported large shrimp, valued at approximately USD 26 billion (based on 2021 data) (see Table 6).

Table 5 | Latest production (wild and farmed) and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
China	3,447.5	33%	1%
India	1,443.3	14%	17%
Indonesia	1,164.4	11%	6%
Viet Nam	1,143.2	11%	8%
Ecuador	892.9	9%	38%
Thailand	457.9	4%	7%
Mexico	272.8	3%	12%
Argentina	223.7	2%	63%
Other	1,303.4	13%	19%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

# LARGE SHRIMP

**Table 6 |** Bilateral trade flows showing the main large shrimp exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

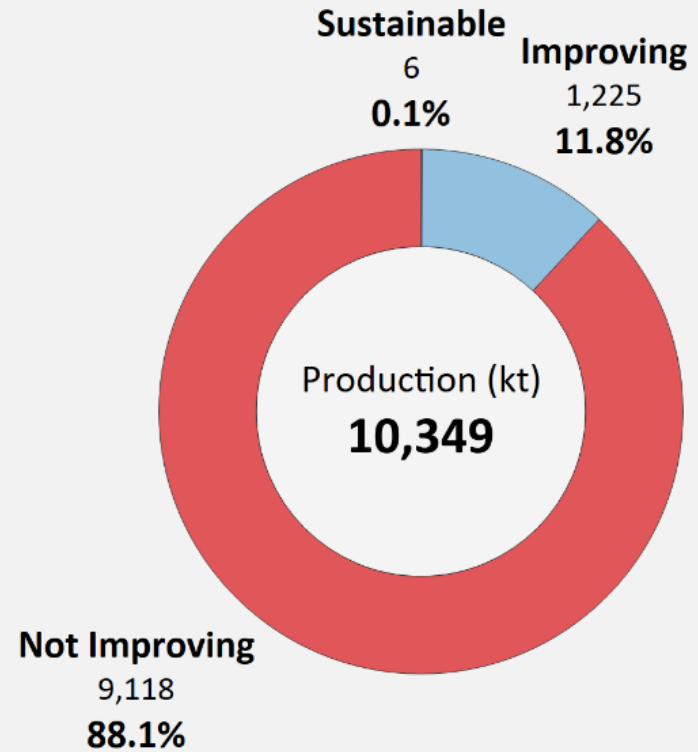
Exporter \ Importer	United States	China	Japan	Spain	France	South Korea	Netherlands	Italy	United Kingdom	Canada	Other	Total 2021 exports (USD million)	% of total exports
India	54%	13%	6%	0%	1%	0%	2%	1%	2%	3%	17%	5,745.5	22%
Ecuador	24%	44%	0%	6%	5%	2%	2%	3%	1%	1%	12%	5,150.5	20%
Viet Nam	28%	8%	15%	0%	1%	10%	4%	0%	6%	5%	23%	3,819.6	15%
Indonesia	73%	2%	16%	0%	0%	0%	1%	0%	1%	1%	4%	2,220.3	8%
China	6%	0%	8%	5%	0%	8%	0%	0%	0%	4%	68%	2,051.7	8%
Thailand	32%	16%	24%	0%	0%	6%	0%	0%	2%	3%	16%	1,529.8	6%
Argentina	5%	7%	6%	38%	1%	0%	0%	17%	0%	0%	25%	1,197.3	5%
Spain	1%	0%	0%	0%	14%	0%	2%	37%	1%	0%	45%	492.4	2%
Bangladesh	10%	0%	5%	1%	5%	0%	20%	0%	14%	1%	42%	316.8	1%
Netherlands	0%	0%	0%	3%	19%	0%	0%	2%	0%	0%	76%	279.9	1%
<b>% of total imports</b>	<b>31%</b>	<b>15%</b>	<b>8%</b>	<b>5%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>2%</b>	<b>2%</b>	<b>24%</b>		

Notes: (1) The results presented might not fully depict the large shrimp trade patterns due to data limitations. Some shrimp is reported in broader categories as unspecified shrimp (FAO 2023c). In these cases, the differentiation between small and large shrimp was inferred based on production data from each country.

# LARGE SHRIMP

## Status and recent progress against T75

- ⦿ **Almost 12% of global large shrimp is considered sustainable or improving.** This represents a slight fall from 2022, but a 5% increase from 2017, and is mainly due to an increase in farmed certified production ([Figure 13](#)).
- ⦿ Several countries, including major producers Ecuador and India, are calculated to have >20% of their production certified to international standards. However, the amount of improving farmed large shrimp decreased from 14.2% in 2022 to 12.2%, due in part to three large AIPs in Thailand being declared inactive.
- ⦿ For wild production, the current 11% of sustainable/improving production is mostly coming from several FIPs in Argentina, the United States (Gulf of Mexico), and India.
- ⦿ To reach the 75% target, it will be vital to improve the sustainability of China’s farmed and wild production, as well as farmed shrimp from India, Indonesia, and Viet Nam. Learn more about SFP’s 2023 Target 75 strategy and prioritized fisheries [here](#).



**Figure 13** | Total estimated production, and percent of large shrimp production that is considered Sustainable, Improving, and Not Improving, as per [SFP’s Target 75 initiative](#).

# LARGE SHRIMP

## SFP initiatives updates

SFP's focus in the sector lies on actively engaging mid-upper and end markets in promoting improvements within large shrimp fisheries and farming via the US Gulf of Mexico Shrimp supplier roundtable SR, Mexican Shrimp SR and the Asia Farmed Shrimp SR. Below are some highlights and updates on recent activities in this sector and the respective Supplier Roundtables.

## Wild caught Shrimps:

- By the end of November 2023, all active Mexican Shrimp SR participants completed audits for the 2022-2023 harvest season implementing control documents, a market-based tool to improve fishery compliance with existing regulations and prevent laundering of illegal gillnet-caught shrimp from the upper Gulf of California to circumvent US embargoes and maintain access to the US market.
- In late April 2023, the US Gulf of Mexico shrimp fishery formally entered MSC and RFM full assessment. The American Shrimp Processors Association (ASPA) is the client group, and is being advised by SFP, Texas Sea Grant, and Audubon Nature Institute.

## Farmed Shrimps:

- Under the Walmart Foundation-funded project “Addressing the Carbon and Biodiversity Impacts of Aquaculture by Motivating Responsible Aquaculture Practices at Scale,” the Aquaculture Stewardship Council (ASC) and SFP aim to establish a roadmap for landscape-scale improvements in farmed shrimp.
- The collaborative project is currently scoping potential locations, sustainability priorities, and stakeholders within the state of Andhra Pradesh, India, and builds upon a memorandum of understanding (MoU) signed between ASC and SFP in 2023 to enhance responsible aquaculture production.
- The production of the multiple ingredients used in compound aquaculture feed is one of the climate change and environmental impact hotspots of aquaculture production.
- Therefore, under the project SFP has created an [Aquaculture Feed Solutions Toolkit](#). This toolkit is available since early 2024 and will help farmed shrimp buyers, suppliers, producers, and feed manufacturers understand and address the climate change and environmental risks associated with feed ingredients. A briefing introducing the Toolkit has been published and focuses on users needing to know what ingredients go into aquaculture feed and where these ingredients come from.
- The aquaculture team is developing its strategy for 2025 to 2030, under the banner of Promoting Regenerative Aquaculture.

# LARGE SHRIMP

SUSTAINABLE / IMPROVING

**11.9%** (+4.9% from 2017)

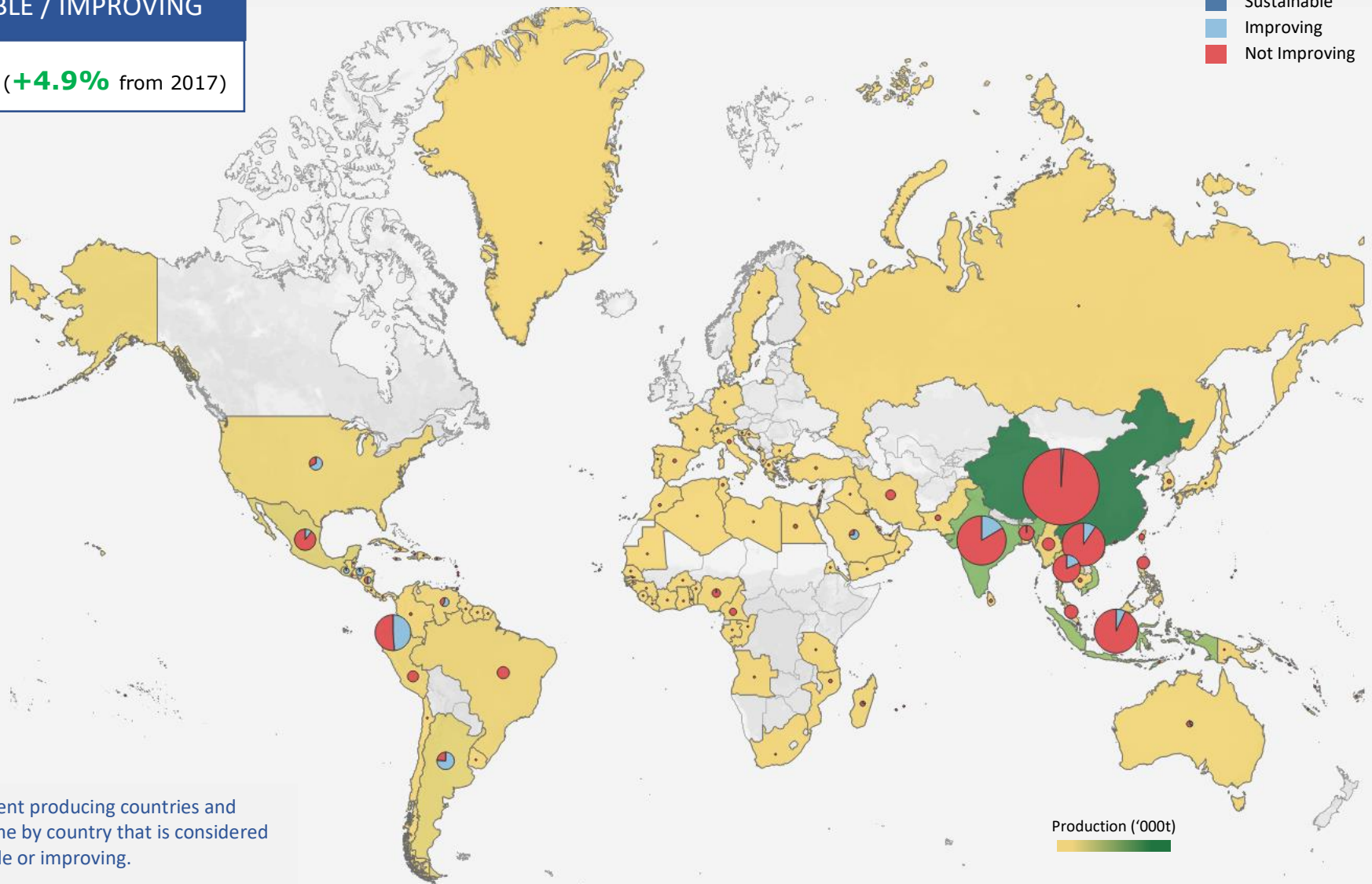


Figure 14 | Current producing countries and percent of volume by country that is considered either sustainable or improving.



Aerial view of shrimp aquaculture farm, in the Phang Nga bay area, Thailand.  
© Stephane Bidouze

# FARMED WHITEFISH

## TILAPIA-PANGASIUUS

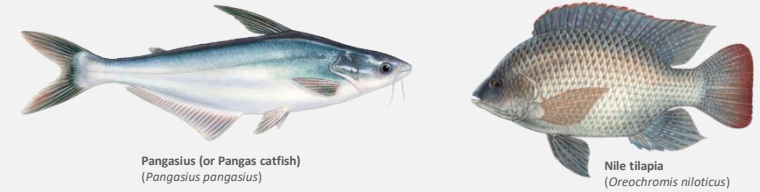
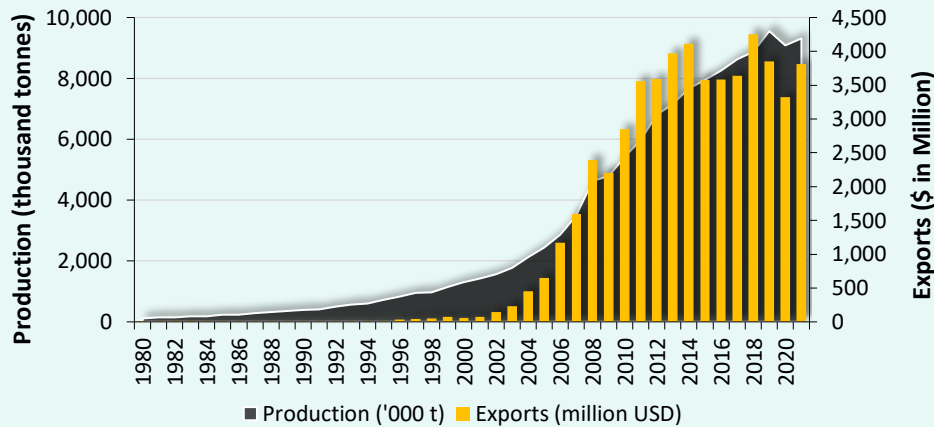


Figure 15 | Time series of farmed whitefish (area) and annual exports (bars)



### Production and trade

- ⦿ Farmed whitefish is one of the sectors with the largest observed growth in production. Production increased rapidly from the 2000s onward (Figure 15). The major producing countries are China, Indonesia, Egypt, Brazil, and Bangladesh (tilapia), and Viet Nam, India, Bangladesh, and Indonesia (pangasius).
- ⦿ Worldwide tilapia and pangasius trade (exports) totaled almost USD 3.8 billion in value in 2021. Asia accounts for about 90% of exports by value, with China and Viet Nam as the main exporting countries from this region. Smaller amounts are also exported from Indonesia and Thailand.
- ⦿ As with other key seafood commodities, the United States and Europe continue to be among the largest markets for tilapia and pangasius, with the United States accounting for almost 30 percent of imports and Mexico and China accounting for 14% and 10%, respectively. However, Mexico (14%) and others (26%) are also major markets. As well as being a major exporter, China is also the third-largest importer, after the United States and Mexico, sourcing predominantly from Vietnam.
- ⦿ African countries such as Côte d'Ivoire are an increasing market (3%). Major tilapia producers such as Egypt and pangasius producers such as Bangladesh and India are not included in the top exporters. Therefore, it can be assumed that product from these countries is destined for their domestic markets (see Table 8).

Table 7 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Indonesia	1,678.6	18%	2%
Viet Nam	1,676.2	18%	13%
China	1,662.6	18%	14%
Egypt	963.9	10%	0%
Bangladesh	739.6	8%	0%
India	657.3	7%	0%
Brazil	361.3	4%	2%
Philippines	281.1	3%	0%
Other	1,285.7	14%	5%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

# FARMED WHITEFISH

## TILAPIA-PANGASIUS

**Table 8 |** Bilateral trade flows showing the main farmed whitefish exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Importer \ Exporter	United States	Mexico	China	Côte d'Ivoire	Colombia	Israel	Brazil	Canada	Thailand	United Kingdom	Other	Total 2021 exports (USD million)	% of total exports
China	29%	28%	0%	8%	2%	5%	0%	1%	0%	0%	27%	1,582.3	42%
Viet Nam	25%	4%	25%	0%	4%	0%	5%	2%	3%	3%	29%	1,556.0	41%
Indonesia	59%	0%	0%	0%	0%	0%	0%	12%	5%	1%	23%	71.3	2%
Netherlands	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	99%	68.1	2%
Colombia	95%	1%	0%	0%	0%	0%	0%	0%	0%	2%	3%	67.6	2%
Honduras	91%	0%	0%	0%	0%	0%	0%	1%	0%	0%	7%	67.0	2%
Taiwan	73%	0%	0%	0%	0%	0%	0%	5%	2%	0%	20%	62.2	2%
Costa Rica	99%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	26.4	1%
Mexico	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	20.1	1%
Thailand	19%	0%	0%	1%	0%	0%	0%	2%	0%	3%	76%	18.4	0%
<b>% of total imports</b>	<b>30%</b>	<b>14%</b>	<b>10%</b>	<b>3%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>2%</b>	<b>31%</b>		



# FARMED WHITEFISH

## TILAPIA -PANGASIUUS

### Status and recent progress against T75

- ⦿ **Just under 6% of farmed tilapia and pangasius is considered improving.** This represents a decrease from 7% in 2022, as well as a decrease of 2.8% from 2017.
- ⦿ This was driven by a decrease in certified farmed tilapia production of around 70,000 tonnes, reflecting a fall in production in most countries, but particularly Brazil, Mexico, and Indonesia. However, certified farmed pangasius production from Vietnam remained constant.
- ⦿ The Hainan Tilapia Sustainability Alliance Aquaculture Improvement Project (AIP) continues to produce 100,000 tonnes of product classified as improving annually.
- ⦿ To reach the 75% target, the remaining production from large producing countries (e.g., China, Indonesia, Viet Nam) would need to be mobilized into improvement initiatives. Learn more about SFP's 2023 Target 75 strategy and prioritized fisheries [here](#).

### SFP initiatives updates

- ⦿ The production of the multiple ingredients used in compound aquaculture feed is one of the climate change and environmental impact hotspots of aquaculture production.
- ⦿ Under the Walmart Foundation funded project “Addressing the Carbon and Biodiversity Impacts of Aquaculture by Motivating Responsible Aquaculture Practices at Scale,” SFP has created an [Aquaculture Feed Solutions Toolkit](#). This toolkit is available since early 2024 and will help fed seafood buyers, suppliers, producers, and feed manufacturers understand and address the climate change and environmental risks associated with feed ingredients.

# FARMED WHITEFISH

## TILAPIA-PANGASIUUS

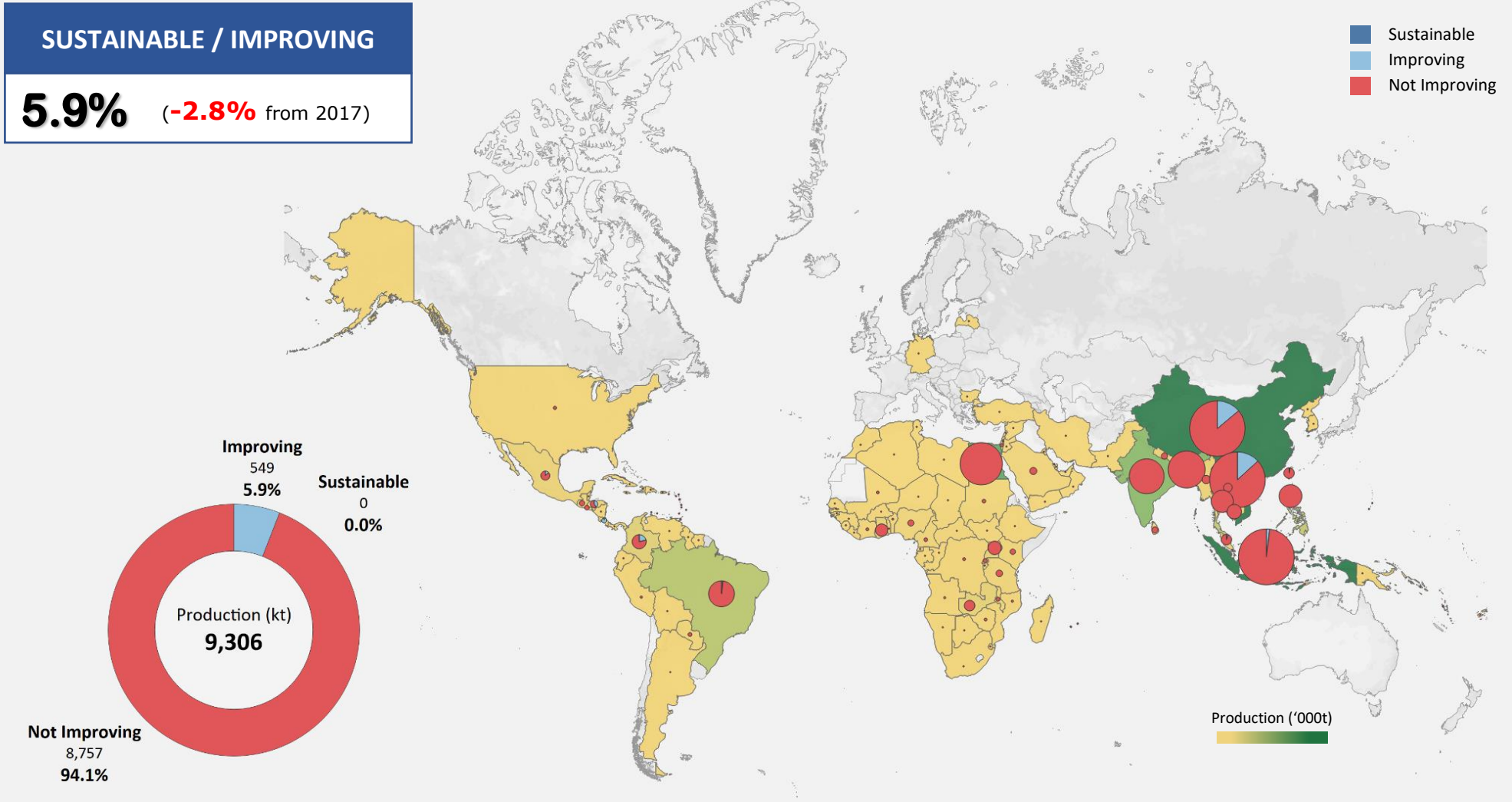


Figure 16 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# WILD CLASSIC WHITEFISH



Figure 17 | Time series of wild classic whitefish production (area) and annual imports (bars)

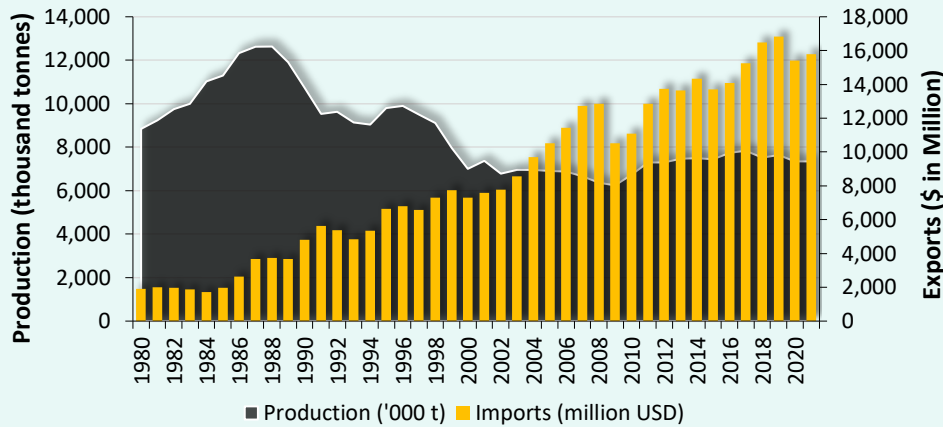


Table 9 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Russia	2,472.0	34%	88%
United States	1,877.3	26%	100%
Norway	696.3	9%	99%
Iceland	395.6	5%	100%
Argentina	339.3	5%	36%
Japan	231.1	3%	0%
Spain	167.5	2%	5%
South Africa	150.9	2%	92%
Other	1,007.1	14%	53%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Wild classic whitefish remains an important seafood sector within the scope of Target 75, with latest estimated global production of 7.3 million tonnes.
- After a declining trend in catches from the late 1980s to early 2000s, likely due to the collapse of some important Atlantic cod stocks (e.g., [Newfoundland cod](#)), wild whitefish production has been relatively stable in the last two decades (Figure 17).
- In terms of species, catches are dominated by Alaska pollock (*Gadus chalcogrammus*), which accounts for almost half (48%) of the total production of this sector. Other important species are Atlantic cod (*Gadus morhua*) (16%), Argentine hake (*Merluccius hubbsi*) (6%), and Pacific cod (*Gadus macrocephalus*) (5%).
- Russia and the United States are the top producing countries, together representing almost 60% of the total production. More than four fifths (84%) of wild whitefish is captured in the North Pacific (58%) and NE Atlantic (26%) oceans (Table 9) (FAO 2023b)
- Following a steady increase from the late 1980s to 2018, annual wild classic whitefish exports have dropped slightly in last couple of years, reaching more than \$15 billion in 2021 (FAO 2023a).
- Russia (16%), Norway (11%) and China (10%) continue to be the top exporters of wild classic whitefish (2021 data). Most of this is estimated to be exported to China, the United States, and the European market (see Table 10).

# WILD CLASSIC WHITEFISH

**Table 10 |** Bilateral trade flows showing the main farmed whitefish exporters in 2021 and their top trade partners, by percentage of each country’s total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer															Total 2021 exports (USD million)	% of total exports
	China	United States	Netherlands	France	Spain	Germany	United Kingdom	Japan	Portugal	Denmark	Italy	South Korea	Sweden	Poland	Other		
Russia	34%	3%	7%	2%	1%	5%	0%	7%	2%	1%	0%	23%	0%	4%	9%	2,460.5	16%
Norway	11%	4%	9%	0%	0%	5%	10%	0%	1%	15%	0%	0%	27%	2%	16%	1,764.3	11%
China	0%	29%	2%	7%	3%	19%	13%	2%	2%	0%	1%	1%	2%	4%	17%	1,486.3	10%
Iceland	0%	18%	37%	0%	1%	3%	19%	0%	0%	7%	0%	0%	0%	1%	11%	1,381.2	9%
United States	8%	0%	5%	4%	2%	11%	0%	42%	1%	2%	2%	2%	0%	2%	18%	1,280.0	8%
Netherlands	0%	0%	0%	25%	25%	6.8%	0%	0%	14%	1%	7%	0%	1%	5%	16%	924.4	6%
Denmark	0%	0%	6%	25%	13%	8%	11%	0%	4%	0%	14%	0%	5%	6%	8%	745.5	5%
Germany	0%	0%	6%	23%	6%	0%	6%	0%	2%	4%	16%	0%	2%	15%	20%	582.5	4%
Sweden	0%	0%	2%	4%	4%	4%	1%	0%	57%	5%	5%	0%	0%	8%	11%	491.9	3%
Spain	0%	1%	1%	12%	0%	0%	0%	0%	31%	0%	22%	0%	1%	2%	29%	485.6	3%
Namibia	0%	0%	3%	2%	26%	3%	0%	0%	2%	0%	6%	0%	0%	0%	7%	360.7	2%
France	9%	6%	1%	0%	18%	6%	1%	0%	0%	1%	7%	0%	1%	2%	7%	350.4	2%
Poland	0%	1%	1%	12%	2%	24%	8%	0%	0%	8%	5%	0%	2%	0%	8%	340.3	2%
Argentina	4%	12%	0%	0%	9%	1%	0%	6%	2%	0%	2%	0%	0%	2%	31%	334.4	2%
% of total imports	9%	8%	8%	7%	7%	7%	6%	5%	5%	4%	4%	4%	4%	4%	18%		

# WILD CLASSIC WHITEFISH

## Status and recent progress against Target 75

- ⦿ Wild Classic Whitefish is one of the sectors (or sub-sectors) that has already achieved the 75% target. **Around 81% of global wild classic whitefish production is considered sustainable or improving.**
- ⦿ This is also one of the sectors that has experienced the largest increase (c. 16%) in **sustainable or improving** production since 2017 (**Figure 18**). This accomplishment is primarily attributed to the ongoing certification of fisheries in the Northeast Atlantic and North Pacific regions, some of which are outcomes of fishery improvement projects (FIPs).
- ⦿ The most noteworthy sources of certified/in FIP production, by volume, include Russian NW Pacific pollock (1.75 million tonnes, 24% of the sector), US NE Pacific pollock (20%), and NE Atlantic cod (13%).
- ⦿ Learn more about SFP's 2023 Target 75 strategy in 2023 and prioritized fisheries [here](#).

## SFP initiatives updates

No recent updates or highlights to report in this subsector.



Hook and line caught Atlantic cod *Gadus morhua*. © Susanna Winqvist from Pixabay

# WILD CLASSIC WHITEFISH

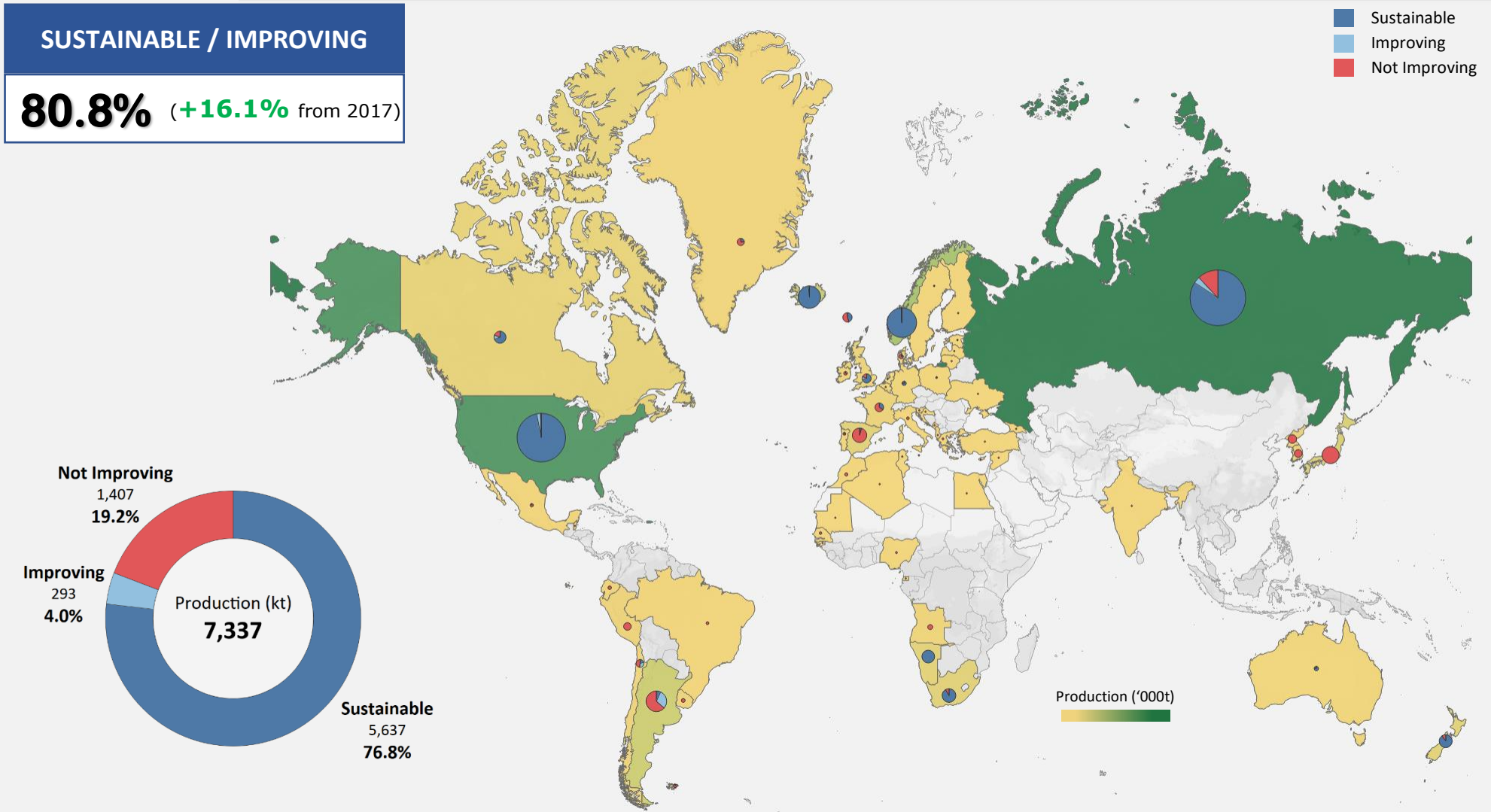
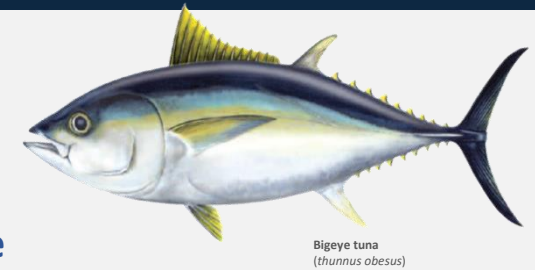
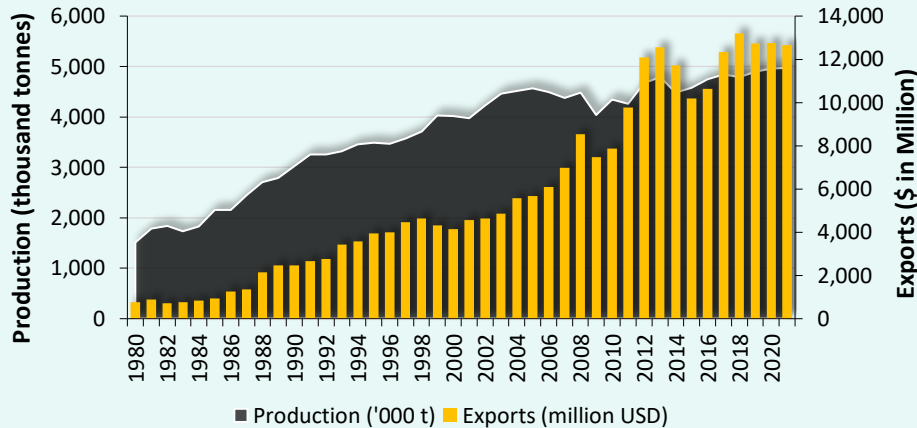


Figure 18 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# TUNA



**Figure 19 | Time series of tuna production (area) and annual exports (bars)**



**Table 11 | 2021 production and percent of volume that is sustainable/improving**

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Indonesia	746.7	15%	8%
Taiwan	314.4	6%	87%
Japan	313.2	6%	25%
Ecuador	291.6	6%	95%
South Korea	288.2	6%	91%
Spain	241.9	5%	95%
Kiribati	188.2	4%	96%
Philippines	177.1	4%	14%
Other	2,412.2	49%	59%

**Note:** For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Tuna is one of the largest seafood sectors within the scope of Target 75, with an average annual production close to 5 million tonnes in the past decade for the four species combined (albacore, bigeye tuna, Skipjack tuna, and yellowfin tuna).
- Global catches have slowly but steadily increased (**Figure 19**). Indonesia (15% of global tuna catches) and a group of five other countries (Taiwan, Japan, Ecuador, South Korea and Spain) remain the top producing countries, accounting for 39% of global tuna production in 2021. The remaining catches are split amongst multiple fishing countries.
- In terms of fishing gears, almost two thirds (65%) of tuna are captured with purse seines, followed by longline (7%), pole-and-line (4%), and small-scale hook-and-line (3%).
- Similar to production, annual tuna exports increased steadily between 1980 (USD 1 billion) and 2018 (c. USD 13 billion), and have been stable since.
- Thailand accounts for 15% of total exported tuna, followed by other exporters such as Ecuador (9%), Spain (9%), and China (9%). The European Union (32%), the United States (11%), and Japan (10%) combined account for more than half (53%) of the traded tuna by value (See **Table 12**).
- Note that these numbers are approximate as (1) some of the trade tuna is reported in broader categories (such as “tuna loins”), and (2) the destination country of some of the traded tuna is reported as “Other nei” (**FAO 2023c**).

# TUNA

**Table 12 |** Bilateral trade flows showing the main exporters of tuna related commodities in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter \ Importer												Total 2021 exports (USD million)	% of total exports
	United States	Japan	Thailand	Spain	Italy	France	United Kingdom	Germany	Netherlands	Viet Nam	Other		
Thailand	23%	11%	0%	0%	0%	0%	1%	0%	1%	1%	63%	1947.63	15%
Ecuador	12%	0%	0%	22%	10%	4%	11%	2%	9%	0%	29%	1195.50	9%
China	1%	14%	30%	10%	1%	0%	0%	0%	0%	10%	34%	1143.51	9%
Spain	1%	4%	1%	0%	29%	19%	3%	1%	1%	0%	42%	1110.22	9%
Taiwan	2%	35%	26%	0%	0%	0%	0%	0%	0%	6%	31%	763.54	6%
Indonesia	30%	15%	11%	2%	8.7%	0.6%	2%	0%	1%	5%	24%	717.53	6%
Viet Nam	46%	3%	3%	3%	4%	0%	1%	3%	2%	0%	35%	682.62	5%
South Korea	3%	33%	12%	4%	6%	10%	0%	1%	1%	10%	20%	519.91	4%
Netherlands	0%	0%	0%	2%	3%	18%	8%	28%	0%	0%	41%	474.60	4%
Seychelles	0%	0%	0%	0%	10%	27%	12%	3%	1%	0%	45%	471.63	4%
<b>% of total imports</b>	<b>11%</b>	<b>10%</b>	<b>9%</b>	<b>7%</b>	<b>7%</b>	<b>5%</b>	<b>4%</b>	<b>3%</b>	<b>3%</b>	<b>3%</b>	<b>37%</b>		



# TUNA

## Status and recent progress against Target 75

- ⦿ **Around 57% of global tuna production is currently considered on track to the 75% target (i.e., sustainable or improving) (Figure 20).**
- ⦿ With several new FIPs and MSC fisheries developed each year, tuna is one of the sectors with the highest increase in production coming from either sustainable or improving sources. Compared to 2017, there has been an increase in sustainable/improving production of approximately 30 percentage points, and an increase of 1.4% from the last year.
- ⦿ This sustainable or improving supply is coming mostly from fisheries flagged in Ecuador, Taiwan, South Korea, Spain or Kiribati.
- ⦿ To reach the 75% target, production from Asia namely Indonesia, Japan or the Philippines, would need to be mobilized into improvement initiatives.
- ⦿ Learn more about SFP's Target 75 strategy in 2024 and prioritized fisheries [here](#).

## SFP initiatives' updates

SFP's focus in the sector lies on actively engaging mid-upper and end markets in SFP's [Protecting Ocean Wildlife](#) initiative to reduce the bycatch of endangered, threatened, and protected species in tuna fisheries. Below are some highlights and updates on recent market-based activities in this sector.

- ⦿ The world's largest tuna company, Thai Union, led a [call for restoration of endangered species](#)
- ⦿ Raising Standards in Tuna Supply Chains: Walmart and Sam's Club announced an [Enhanced Seafood Policy](#)
- ⦿ Other companies are supporting on-the-water efforts to reduce bycatch in their supply chains. Publix donated funds to a FIP in Panama to install electronic monitoring on vessels sourcing mahi, tuna, and swordfish. Aldi purchased Hookpods, which shield hooks in pelagic longline fishing from seabirds diving for the bait, to donate and trial in their tuna supply chain
- ⦿ SFP launched the [Bycatch Solutions Hub](#), an online resource that connects companies and innovators around the world to reverse the decline of ocean wildlife.

# TUNA

**SUSTAINABLE / IMPROVING**

**56.6%** (+29.7% from 2017)

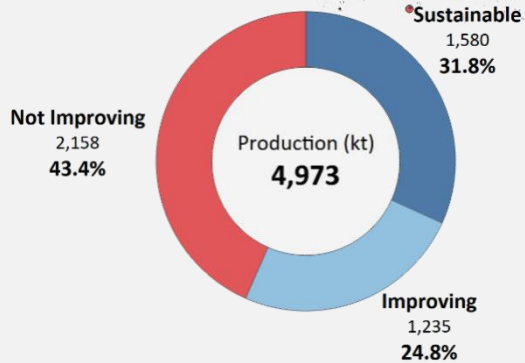
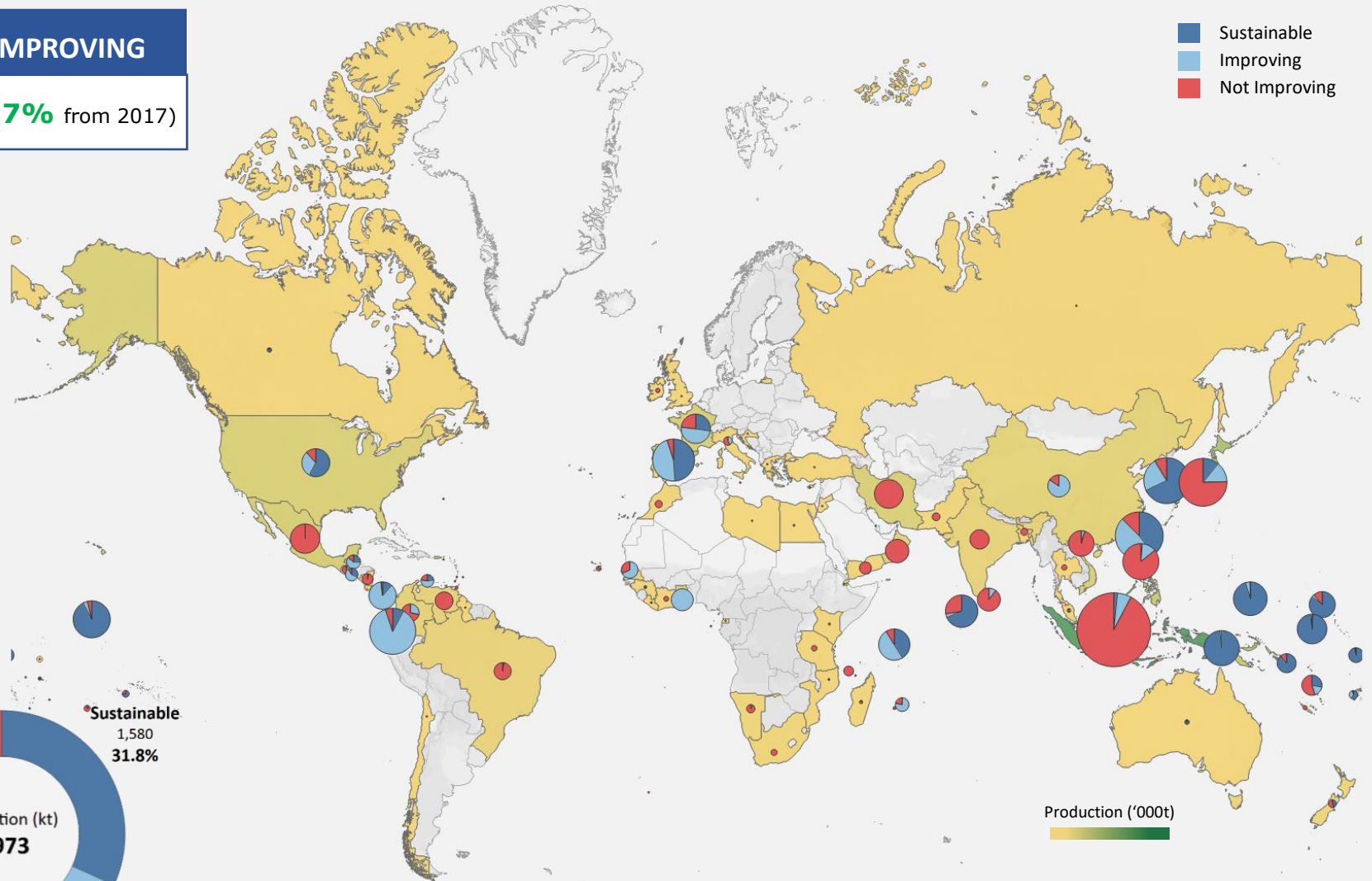


Figure 20 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# SALMON



Figure 21 | Time series of Salmon production (area) and annual exports (bars)

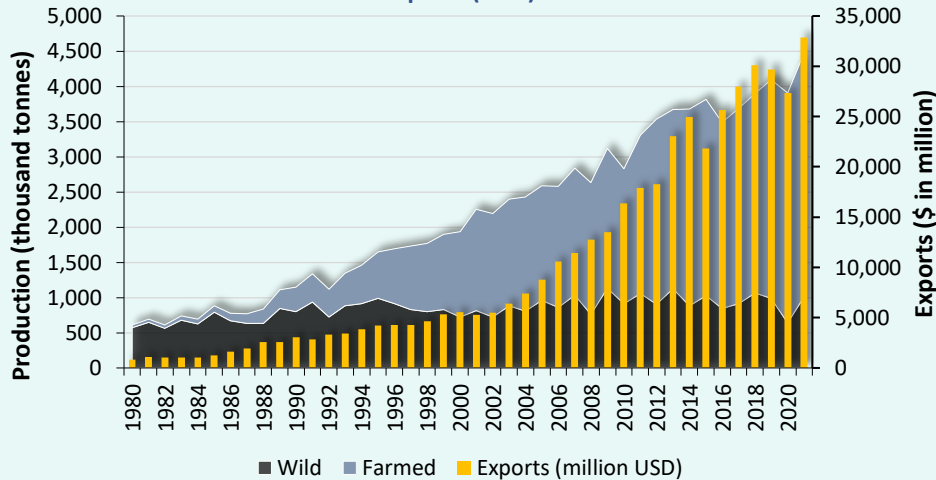


Table 13 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Norway	1,660.0	37%	62%
Chile	995.0	22%	97%
Russia	610.7	14%	55%
United States	386.1	9%	96%
United Kingdom	209.2	5%	98%
Canada	142.2	3%	85%
Faroe Islands	115.7	3%	61%
Japan	113.1	3%	0%
Other	243.2	5%	45%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Salmon is an important seafood sector within the scope of T75 and, while the wild capture has remained stable over time, the farmed component has been increasing steadily, currently representing more than 77% of global production (i.e., three times higher than in the 1990s) (Figure 21).
- Norway and Chile are the most important producing countries (Table 13). Combined, these two countries account for almost two-thirds (59%) of global salmon production, almost all from aquaculture.
- Wild salmon catches are mostly from three countries: Russia (53% of global salmon wild capture), the United States (37%) and Japan (9%). Three species, pink salmon, chum salmon, sockeye salmon, represent 97% of the catches.
- Salmon exports have been increasing steadily since the early 2000s, at a pace of around USD 1.2 billion per year, and are currently estimated at USD 33 billion (FAO 2023a).
- Norway accounts for 30% of total exported salmon followed by Chile (16%) and Sweden (12%). The European Union accounts for more than half of the salmon imports by value, followed by the United States (15%) and Japan (6%) (Table 14) (FAO 2023c).

# SALMON

**Table 14 |** Bilateral trade flows showing the main salmon exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer											Total 2021 exports (USD million)	% of total exports
	United States	France	Germany	Poland	Japan	Italy	Netherlands	Spain	Denmark	China	Other		
Norway	7%	9%	4%	13%	4%	5%	7%	6%	8%	2%	35%	9,892.746	30%
Chile	45%	1%	0%	0%	19%	0%	0%	0%	0%	2%	33%	5,182.680	16%
Sweden	0%	19%	7%	20%	0%	11%	9%	15%	2%	0%	16%	4,069.328	12%
Poland	3%	6%	55%	0%	0%	10%	1%	0%	3%	0%	21%	1,900.041	6%
Denmark	5%	10%	25%	9%	0%	11%	10%	8%	0%	0%	21%	1,801.832	5%
United States	0%	2%	6%	3%	16%	1.0%	2%	0%	0%	13%	57%	1,223.937	4%
United Kingdom	25%	47%	0%	5%	1%	1%	1%	0%	0%	7%	13%	1,049.464	3%
Netherlands	24%	10%	19%	2%	0%	8%	0%	3%	1%	0%	32%	929.243	3%
Canada	95%	0%	0%	0%	2%	0%	0%	0%	0%	0%	2%	898.504	3%
Faroe Islands	27%	0%	0%	0%	1%	0%	4%	0%	38%	8%	23%	653.194	2%
<b>% of total imports</b>	<b>15%</b>	<b>9%</b>	<b>9%</b>	<b>8%</b>	<b>6%</b>	<b>5%</b>	<b>5%</b>	<b>5%</b>	<b>3%</b>	<b>2%</b>	<b>33%</b>		

**Notes:** (1) These estimates might include other salmonids, as some of the commodities are reported in broader categories. (2) The percent exported per trade partner for the Faroes was inferred from mirror (imports) data.

# SALMON

## Status and recent progress against T75

- ⦿ The Salmon sector achieved the T75 target in early 2021, and sustainable/improving production has remained above or around the 75% target since.
- ⦿ However, there has been a 12.5% drop compared to last year ([Figure 2](#)), and currently **around 72% of global salmon production is considered sustainable or improving** ([Figure 22](#)).
- ⦿ The reported drop could be primarily attributed to a 38% (300,000 tonnes) reduction in Norway’s certified farmed production. This decline could be linked to uncertainties arising from the new tax imposed on the industry in 2023. However, based on projections for overall farmed seafood production, certified salmon production is expected to continue growing in the coming years.
- ⦿ For the wild component, there has been continued certification of Russian salmon fisheries, as well as new fishery improvement projects (FIPs)
- ⦿ Learn more about SFP’s Target 75 strategy in 2023 and prioritized [here](#).

## SFP initiatives updates

- ⦿ The production of the multiple ingredients used in compound aquaculture feed is one of the climate change and environmental impact hotspots of aquaculture production.
- ⦿ Under the Walmart Foundation funded project “Addressing the Carbon and Biodiversity Impacts of Aquaculture by Motivating Responsible Aquaculture Practices at Scale,” SFP has created an [Aquaculture Feed Solutions Toolkit](#). This toolkit is available since early 2024 and will help fed seafood buyers, suppliers, producers, and feed manufacturers understand and address the climate change and environmental risks associated with feed ingredients.

# SALMON

SUSTAINABLE / IMPROVING

**71.6%** (+32.9% from 2017)

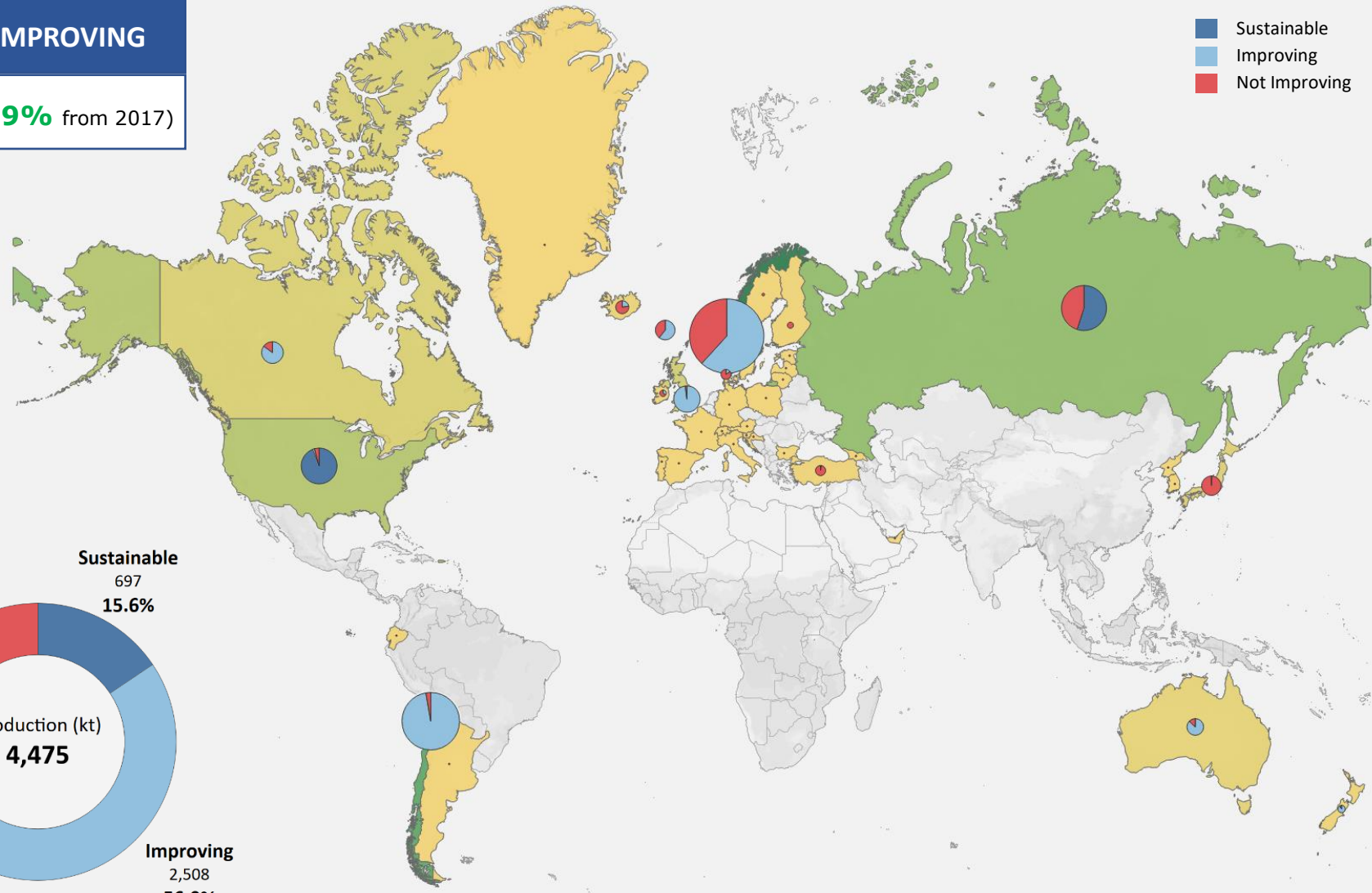
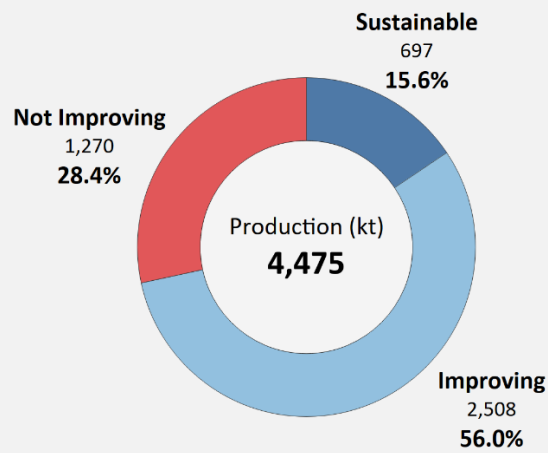
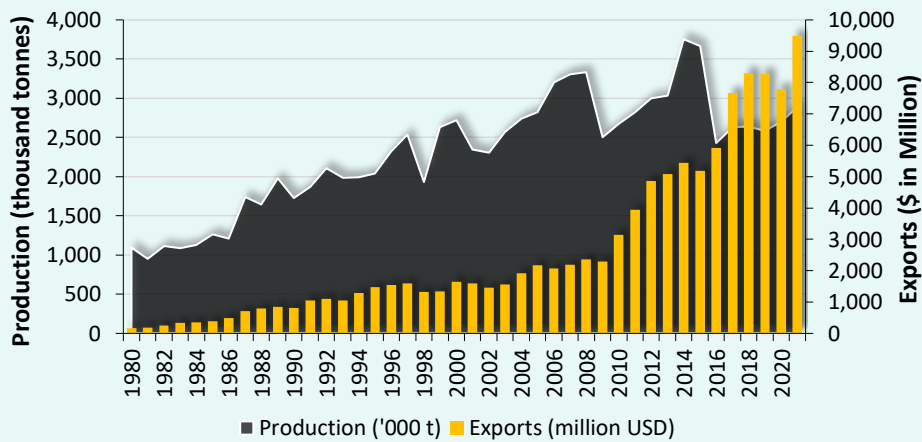


Figure 22 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# SQUID



**Figure 23 | Time series of squid production (area) and annual exports (bars)**



**Table 15 | 2021 production and percent of volume that is sustainable/improving**

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
China	900.8	31%	0%
Peru	517.9	18%	85%
Indonesia	204.2	7%	0%
Taiwan	151.4	5%	39%
Argentina	132.2	5%	100%
Viet Nam	125.8	4%	0%
Falkland Islands	96.4	3%	0%
Russia	83.8	3%	0%
Other	675.3	23%	18%

**Note:** For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Squid is increasingly becoming a relevant sector in the global seafood landscape. Historical catches present an overall increasing trend peaking in 2014, followed by a drop to current values (at roughly 2.9 million tonnes) (**Figure 23**).
- China (31% of global squid catches) and Peru (18%) remain the top producing countries, accounting for nearly half (49%) of squid production in 2021 (**Table 15**) (**FAO 2023b**).
- Squid catches are mostly from the Southeast Pacific (35% of global catches, almost all jumbo flying squid), Northwest Pacific (19%, mostly unspecified squid species), and the Southwest Atlantic (19%, mostly Argentine shortfin squid and Patagonian squid) oceans.
- Annual squid exports have also been increasing steadily at around USD 0.5 billion per year in the past two decades and are currently estimated at USD 9.8 billion (2021 data) (**FAO 2023a**).
- China accounts for 43% of total exported squid, followed by other major exporters such as Spain (7%), India (6%), and Peru (6%). Asia accounts for more than 50% of global squid imports by value (**Table 16**) (**SFP 2022c**).
- Similar to octopus, data availability and transparency is still a challenge in this sector, with much of the reported production and trade combining multiple squid species, or squids with other cephalopods such as cuttlefish (**FAO 2023b**, **FAO 2023c**).

# SQUID

**Table 16 |** Bilateral trade flows showing the main squid exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer											Total 2021 exports (USD million)	% of total exports
	Thailand	China	Italy	Spain	Japan	South Korea	United States	Philippines	Malaysia	Taiwan	Other		
China	23%	0%	1%	2%	14%	8%	7%	11%	8%	6%	19%	4,052	43%
Spain	0%	1%	47%	0%	0%	0%	4%	0%	0%	0%	48%	688.0	7%
India	11%	10%	17%	26%	1%	0%	8%	0%	4%	1%	23%	622.3	7%
Peru	9%	28%	5%	18%	4%	14%	3%	0%	0%	2%	16%	585.3	6%
Indonesia	3%	55%	2%	0%	1%	2%	2%	0%	1%	11%	23%	507.2	5%
Falkland Islands	0%	0%	0%	85%	1%	0.0%	0%	0%	0%	0%	14%	328.9	3%
Morocco	0%	0%	30%	67%	0%	0%	0%	0%	0%	0%	2%	310.0	3%
Viet Nam	19%	15%	8%	1%	19%	15%	3%	1%	4%	1%	13%	307.9	3%
Argentina	10%	24%	3%	11%	4%	24%	3%	0%	0%	0%	21%	249.0	3%
Thailand	0%	1%	34%	0%	23%	1%	18%	0%	2%	1%	20%	242.2	3%
<b>% of total imports</b>	<b>13%</b>	<b>11%</b>	<b>9%</b>	<b>8%</b>	<b>8%</b>	<b>6%</b>	<b>6%</b>	<b>5%</b>	<b>5%</b>	<b>4%</b>	<b>100%</b>		

**Notes:** (1) The results presented might not fully depict the squid trade patterns due to data limitations. Squid is generally reported combined with other species such as cuttlefish, and in some countries it may also be reported in broader categories as unspecified cephalopods (FAO 2023c). (2) The percent exported per trade partner for the Faroes was inferred from mirror (imports) data.



# SQUID

## Status and recent progress against T75

- ⦿ **Around 26% of global squid production is considered sustainable or improving.** This represents an increase of more than 8% from last year, and of 26% from 2017 ([Figure 24](#)).
- ⦿ This sustainable or improving supply is coming mostly from fisheries flagged in Peru, followed by Argentina, the United States, Taiwan, and Indonesia.
- ⦿ To reach the 75% target, production from Asia, mostly China, would need to be mobilized, or kept on track in improvement initiatives (e.g., Indonesia). Learn more about SFP's 2023 Target 75 strategy and prioritized fisheries [here](#).
- ⦿ Under the guidance of CALAMASUR's scientific advisors, a [regional jumbo flying squid stock assessment](#) was developed and presented at the SPRFMO Scientific Committee meeting in Panama (September 2023).
- ⦿ [Registration of artisanal squid fishing in Peru](#): Following years of SFP efforts, the significant challenges hindering cooperative artisanal vessel owners from obtaining fishing permits were resolved with the approval of Supreme Decree No. 003-2023-PRODUCE in May 2023 by the Ministry of Production, providing the necessary mechanisms for over 900 artisanal squid vessel owners to achieve legal status, and thereby contributing to reducing IUU. As of November 2023, a total of 3,419 vessels have been registered in the two formalization processes: 930 in the cooperative regime and 2,489 in the SIFORPA II regime.

## SFP initiatives updates

SFP's focus in the sector lies in actively engaging mid-upper and end markets in promoting improvements within squid fisheries via the [Global Squid SR](#), and engaging fishers and processors from producing countries in long-term public-private alliances with management authorities to address the risks of IUU fishing and human rights abuses in squid fisheries and global supply chains.

The following are some highlights and updates on recent activities in this sector and with the SR.

- ⦿ [Major international squid producers advocated with members of the South Pacific Regional Fisheries Organization \(SPRFMO\)](#) to reach an agreement on limiting fishing effort and increasing observer coverage for jumbo flying squid. At the 11th annual SPRFMO meeting, industry leaders asserted the importance of global squid fisheries to markets and people, and expressed urgency for measures to ensure their sustainability.
- ⦿ A new FIP was launched in February 2023 based on demand and support by SR participants: [Argentina Shortfin-Squid – jig \(CAPA\)](#).

# SQUID

SUSTAINABLE / IMPROVING

**26.2%** (+25.9% from 2017)

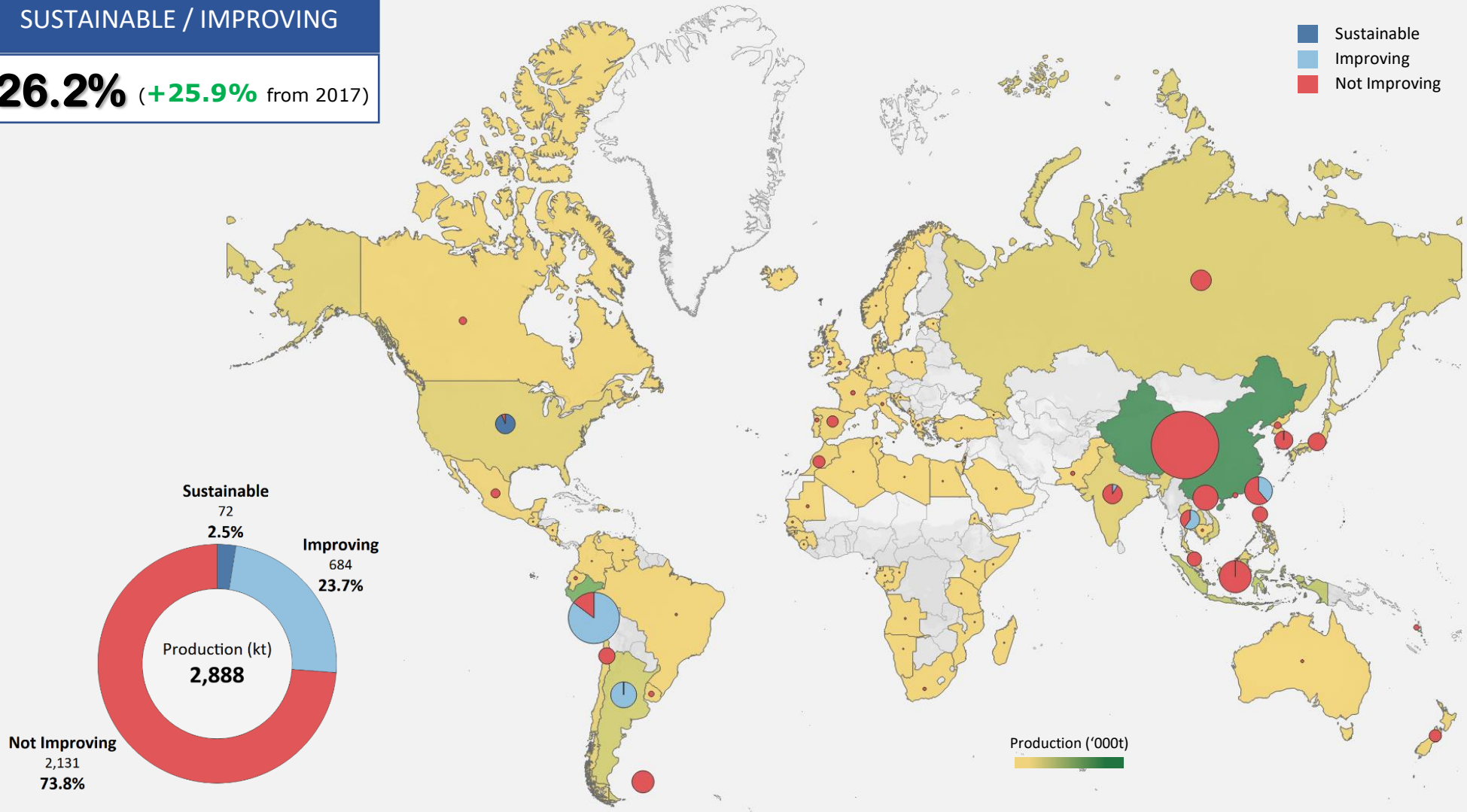


Figure 24 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# SNAPPER-GROUPER

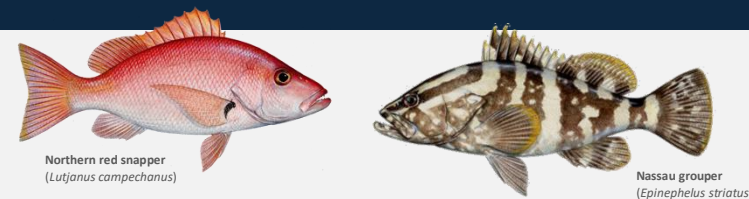


Figure 25 | Time series of Snapper and Grouper production (area) and annual imports (bars)

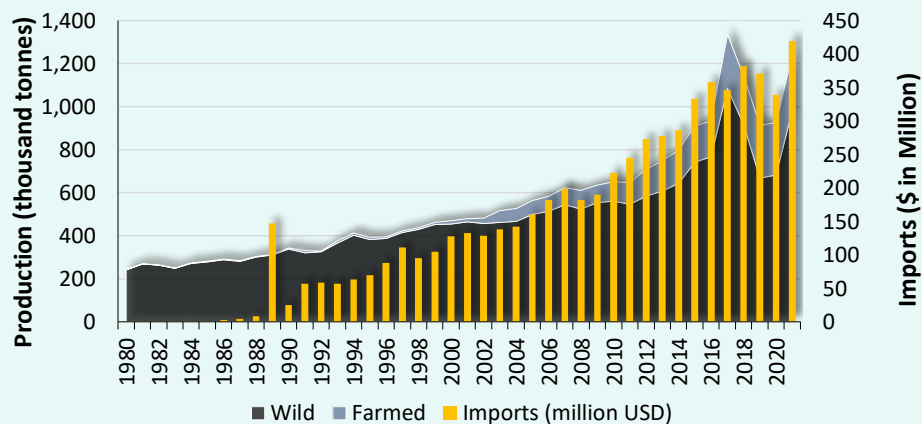


Table 17 | 2020 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Indonesia	531.6	43%	27%
China	299.7	24%	0%
India	59.3	5%	7%
Mexico	48.5	4%	5%
Malaysia	43.1	3%	0%
Philippines	38.2	3%	0%
Brazil	23.2	2%	4%
Thailand	19.0	2%	0%
Other	177.0	14%	1%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Snapper and grouper are valuable fishery resources within the scope of Target 75, with production of more than 1.2 million tonnes in 2021, nearly 80% of which was from wild capture (FAO 2023b).
- Wild capture increased in the last year by 44%, mainly due to a significant increase in Indonesia’s reported snapper and grouper catches, from 240,000 tonnes to 531,000 tonnes. Note that this growth may be due to improved reporting, i.e., to a lower taxonomical level, rather than increase in actual snapper and grouper production.
- Indonesia remains the top producing country, with 43% of global production, followed by China (24%) (Table 17).
- Aquaculture in this sector has been gaining importance, and in the last years has contributed to more than 20% of global snapper and grouper production.
- Data transparency and reporting in this sector remains a challenge. Around 75% of total production is still reported in broader categories such as snappers nei or groupers nei.
- Snapper and grouper global trade shows an increasing trend. After a drop in 2020 (likely due to COVID restrictions), annual imports reached an historical high in 2021 (Figure 25) (FAO 2023a).
- Mexico (22% of total exports by value), Brazil (17%) and Viet Nam (8%) are the top exporters of snapper and grouper (2021 data). Most of it is estimated to be exported to the United States (see Table 18). However, the quality and detail of trade data for this sector is low, and these figures may not fully depict the trade flows for this sector.

# SNAPPER-GROUPER

**Table 18 |** Bilateral trade flows showing the main snapper-grouper exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer											Total 2021 exports (USD million)	% of total exports
	United States	South Korea	Malaysia	Taiwan	Sri Lanka	Bahrain	Thailand	Qatar	Costa Rica	Brunei	Other		
Mexico	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	90.66	22%
Brazil	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.1%	71.07	17%
Viet Nam	4%	96%	0%	1%	0%	0%	0%	0%	0%	0%	0.0%	35.00	8%
Panama	97%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	33.83	8%
Venezuela	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0%	28.93	7%
Nicaragua	98%	0%	0%	0%	0.0%	0.0%	0%	0%	2%	0%	0.0%	26.02	6%
Indonesia	19%	0%	65%	13%	0%	0%	0%	0%	0%	0%	2%	19.26	5%
Suriname	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	16.84	4%
Guyana	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11.86	3%
Costa Rica	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10.89	3%
<b>% of total imports</b>	<b>76%</b>	<b>13%</b>	<b>4%</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>0%</b>	<b>0%</b>	<b>1%</b>		

**Notes:** (1) These estimates might include other coastal fishes, as some of the commodities are reported in broader categories (e.g., "Miscellaneous coastal fish, nei, frozen"). (2) The values presented are based on mirror (imports) data, given several exporting countries report snapper or grouper under broader categories.

# SNAPPER-GROUPER

## Status and recent progress against T75

- ⦿ Around 12.3% of snapper and grouper production is considered sustainable or improving (Figure 26).
- ⦿ This represents a decrease of around 3 percentage points compared to last year, and it is mostly due to the significant increase in Indonesian production.
- ⦿ Even though it is still far from the 75% target, the sector shows a slight increase compared to 2017. (Figure 27). This is a very positive achievement, given the complexity of the sector, where most of the catch comes from multiple small-scale fisheries and complex supply chains.
- ⦿ To reach the 75% target, production from Asia (mostly China but also Indonesia, Malaysia, the Philippines and India), Mexico, and Brazil would need to be mobilized into improvement initiatives.
- ⦿ Learn more about SFP’s 2023 Target 75 strategy and prioritized fisheries [here](#).

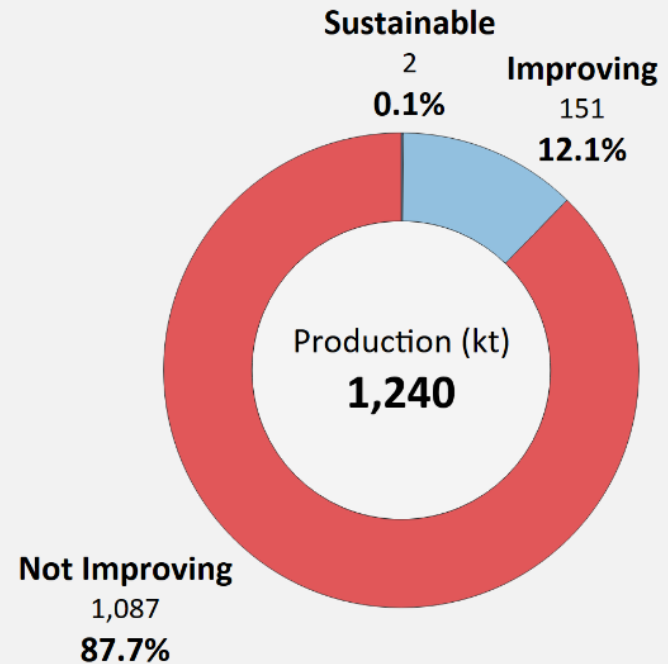


Figure 26 | Total estimated production, and percent of snapper and grouper production that is considered Sustainable, Improving, and Not Improving, as per SFP’s Target 75 initiative.

# SNAPPER-GROUPER

## SFP initiatives updates

SFP's focus in the sector lies in actively engaging mid-upper and end markets in promoting improvements within snapper and grouper fisheries via the [Mexican Snapper and Grouper SR](#) and the [Indonesian Snapper and Grouper SR](#). The SRs monitor the work of existing FIPs in the regions and address overarching issues, such as insufficient governance and illegal fishing, co-management in the artisanal fisheries, and work to develop sourcing commitments and policies on sustainability issues and sourcing best practices. Below are some highlights and updates on recent activities in this sector and the respective Supply Chain Roundtables.

- 🗣️ In December 2023, SFP hosted a capacity-building session on traceability for the Mexican Snapper Grouper SR. The goal of the webinar was for US importers to learn more about current and future traceability requirements, as well as the resources in Mexico and the U.S. that could help ease compliance with those requirements. The webinar included presentations from representatives of NOAA (to speak about the Seafood Import Monitoring Program) and the FDA (to speak on Food Safety Modernization Act traceability requirements). In addition, a representative of Oceana Mexico presented on a proposed traceability regulation in Mexico.
- 🗣️ A Fishery Improvements Portfolio virtual meeting for SR participants and their Mexican suppliers was held in July 2023. This meeting provided an opportunity for 10 U.S. importers and 10 Mexican producers/processors to better understand the opportunities for supporting improvement activities in Mexican snapper and grouper fisheries, including the Mexican Snapper and Grouper SR, Yucatan Grouper FIP, Campeche Snapper FIP, and Grouper Recovery Plan. The goal of the meeting was to further increase Mexican industry participation in FIPs and other improvement efforts for Mexican snapper and grouper fisheries. The July report of the Yucatan Grouper FIP announced the expansion of the FIP to include three new industry participants in Mexico.
- 🗣️ The Indonesian Snapper and Grouper SR met in September 2023 to review a draft and discuss using a risk-assessment approach to analyze the extent of fisher and vessel registration in the Indonesian snapper-grouper supply chain. The approach will be used to help assess the level of risk of unregistered fishers and vessels and guide development of a sustainable sourcing policy/commitment with their suppliers to support implementation of co-management strategies. The goal is to help support efforts to ensure legal fishing rights for the small-scale fishers who operate in this fishery.
- 🗣️ SFP and Yayasan Konservasi Laut-YKL (SFP's partner NGO in South Sulawesi) and DKP of South Sulawesi Province initiated and organized a series of discussions with fishers in five South Sulawesi target areas (Barrang Caddi, Galesong, Langkai, Sarappo, and Satangnga) to establish a Snapper Grouper Fishers Network. There are more than 413 snapper grouper fishers listed to be included in the Fishers Network, called Forkom Narasi. SFP and Yayasan Konservasi Laut continue to aid the snapper grouper fishers in five locations on securing fisher IDs and fisher and vessel registration (< 7 GT).

# SNAPPER-GROUPER

SUSTAINABLE / IMPROVING

**12.3%** (+4.2% from 2017)

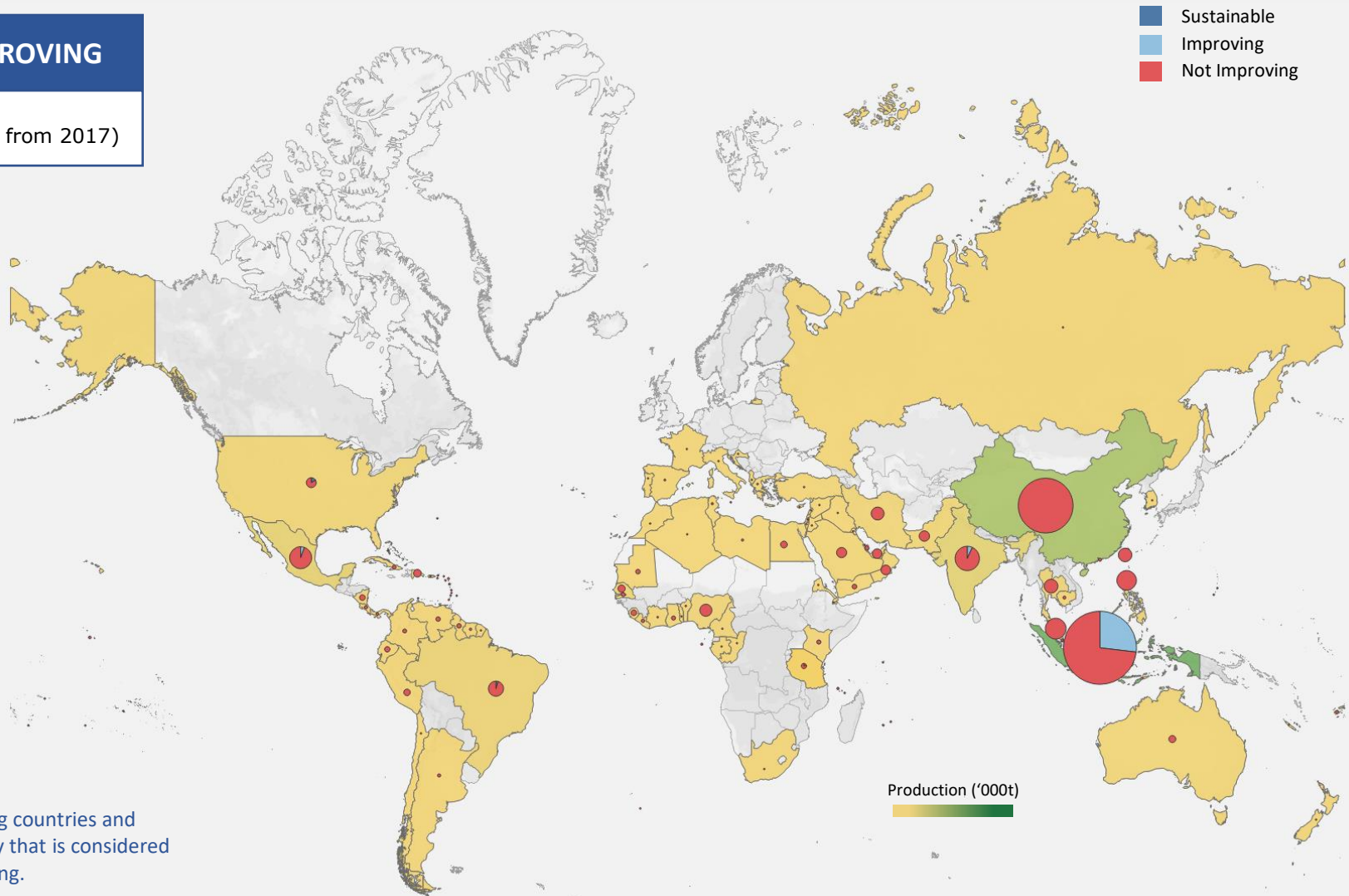


Figure 27 | Current producing countries and percent of volume by country that is considered either sustainable or improving.



School of two spot red snapper (*Lutjanus bohar*). Sharm El Sheikh, Red Sea, Egypt  
© Mayumi Kubota



# OCTOPUS



Common octopus  
(*Octopus vulgaris*)

Figure 28 | Time series of octopus production (area) and annual exports (bars)

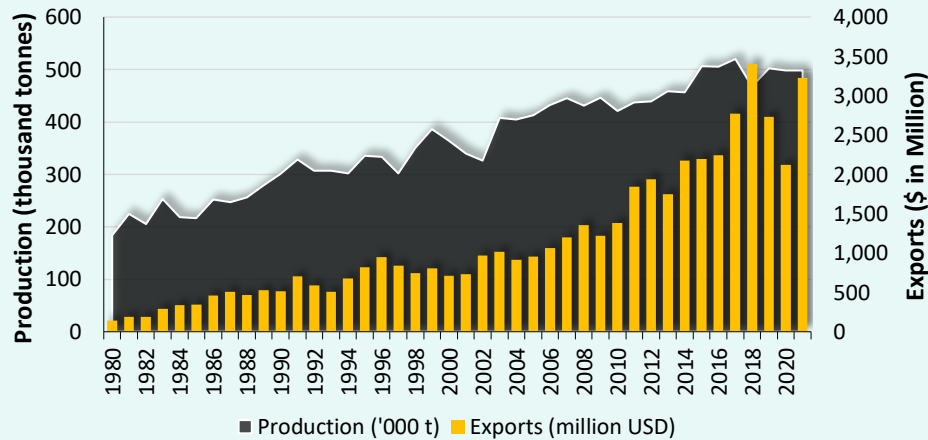


Table 19 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Viet Nam	107.9	22%	0%
China	106.3	21%	0%
Morocco	63.5	13%	0%
Mexico	37.4	7%	10%
Mauritania	27.3	5%	0%
Japan	27.1	5%	0%
Indonesia	19.1	4%	1%
South Korea	19.0	4%	0%
Other	91.1	18%	4%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Octopus is a relatively small sector, with global production of around 500,000 metric tons annually (almost all from wild capture). Catches increased steadily until 2017, and have stabilized since (Figure 28) (FAO 2023b).
- Viet Nam (22%), China (21%), and Morocco (13%) remain the top producing countries, accounting for more than half (56%) of octopus production in 2021. Many countries such as Viet Nam, Cambodia, or Madagascar still report octopus production lumped with other cephalopods, thus octopus-specific catches for these countries are estimated based on the best available information.
- Most (57%) octopus is estimated to be taken from the North Pacific and Western and Central Pacific.
- Mirroring seafood as a whole, octopus annual exports by value have been increasing steadily since the early 2000s. Most recent figures show exports of USD 3.2 billion for this sector (FAO. 2023a).
- Morocco overcame China as the lead exporter, and accounted for 21% of total exported octopus in 2021 by value. Other important exporters are Spain (17%), China (16%), and Mauritania (10%) (FAO. 2023c). Most of the traded octopus is estimated to be exported mostly to the European Union (more than 50% of total imports), South Korea (17%), and Japan (11%) (see Table 20).

# OCTOPUS

**Table 20 |** Bilateral trade flows showing the main octopus exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer											Total 2021 exports (USD million)	% of total exports
	Spain	South Korea	Italy	Japan	United States	Portugal	France	Greece	Germany	China	Other		
Morocco	66%	0%	20%	10%	0%	1%	0%	1%	0%	0%	2%	689.4	21%
Spain	0%	0%	33%	0%	22%	20%	5%	3%	4%	0%	13%	561.4	17%
China	1%	48%	2%	26%	5%	0%	0%	0%	0%	0%	18%	531.4	16%
Mauritania	62%	6%	2%	23%	0%	5%	0%	2%	0%	0%	0%	326.1	10%
Viet Nam	1%	68%	2%	18%	4%	0%	0%	0%	0%	1%	7%	293.6	9%
Portugal	53%	0%	8%	0%	22%	0.0%	6%	0%	1%	0%	9%	113.2	4%
Indonesia	1%	6%	27%	8%	26%	0%	2%	11%	0%	5%	12%	111.7	3%
Senegal	36%	1%	47%	7%	0%	3%	1%	3%	0%	0%	2%	99.5	3%
Mexico	17%	0%	36%	1%	27%	0%	2%	3%	0%	0%	13%	90.4	3%
India	7%	1%	18%	1%	17%	1%	2%	2%	0%	21%	32%	61.4	2%
<b>% of total imports</b>	<b>26%</b>	<b>17%</b>	<b>16%</b>	<b>11%</b>	<b>9%</b>	<b>5%</b>	<b>2%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>100%</b>		

# OCTOPUS

## Status and recent progress against T75

- ⦿ Nearly 1.6% of global octopus production is considered sustainable or improving (Figure 29), representing a small increase from the previous year.
- ⦿ This sustainable or improving supply is coming mostly from Mexico, followed by India.
- ⦿ A prospective FIP covering Mauritania's octopus fisheries (catalyzed by the Global Octopus Supply Chain Roundtable (GO SR) and the Association Mauritanienne des Producteurs et Exportateurs de Poulpe (AMPEP)) has recently been publicly announced. When formalized, this FIP, which will cover all of Mauritania's octopus production, will represent a significant increase in the percentage of sustainable/improving production in the sector.
- ⦿ To reach the 75% target, the remaining production from Asia (namely Viet Nam and China), Northern Africa, and Mexico would need to be mobilized into improvement initiatives.
- ⦿ Learn more about SFP's Target 75 strategy in 2023 and prioritized fisheries [here](#)

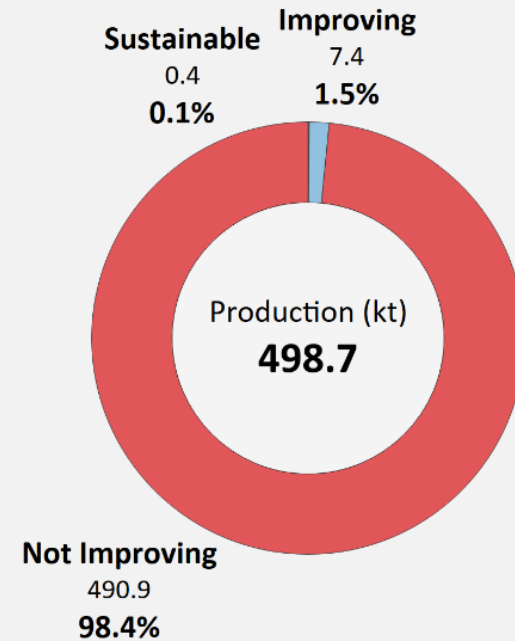


Figure 29 | Total estimated production, and percent of octopus production that is considered Sustainable, Improving, and Not Improving, as per [SFP's Target 75 initiative](#).

# OCTOPUS

## SFP initiatives updates

SFP's focus in the sector lies on actively engaging mid-upper and end markets in promoting improvements within octopus fisheries via the [Global Octopus SR](#), and engaging fishers and processors from producing countries in long-term public-private alliances with management authorities to address governance gaps.

With octopus fisheries being predominantly small-scale, this work includes assisting fishermen to organize themselves and become an official part in co-management of the fisheries.



Octopus pots in Sagres fishing harbor, southern Portugal. © Shutterstock

Below are some highlights and updates on recent activities in this sector and the respective Supply Chain Roundtable.

- 🕒 The Mauritanian government and key stakeholders publicly recognized the importance of the [Octopus Fishery Improvement Project \(FIP\)](#) for the national fisheries strategy (more [here](#)).
- 🕒 A new FIP was launched in February 2023: Indonesia-Sulawesi Handline and Spear Octopus FIP. The FIP launch was attended by representatives of the national and provincial government, NGOs, fishers representatives, and scientists. It was also presented during the SR meeting in Boston. The FIP is in the process of becoming active on FisheryProgress.org. SFP is supporting artisanal fishermen to become organized and actively participate in co-management.
- 🕒 The [Yucatan octopus FIP](#) is progressing and has maintained its A rating. New stakeholders have joined the FIP, and the volume of octopus included in the FIP has increased. The FIP, initiated and supported by the SR, is also included in the ITM program (in transition to MSC), and some of the FIP stakeholders have recently become Fairtrade-certified.
- 🕒 A [new sector report](#) by SFP found that, while the reported production and trade of octopus has increased significantly in recent decades, a lack of data and inadequate regulations present a challenge to sustainable management of these fisheries.

# OCTOPUS

SUSTAINABLE / IMPROVING

**1.6%** (+1.5% from 2017)

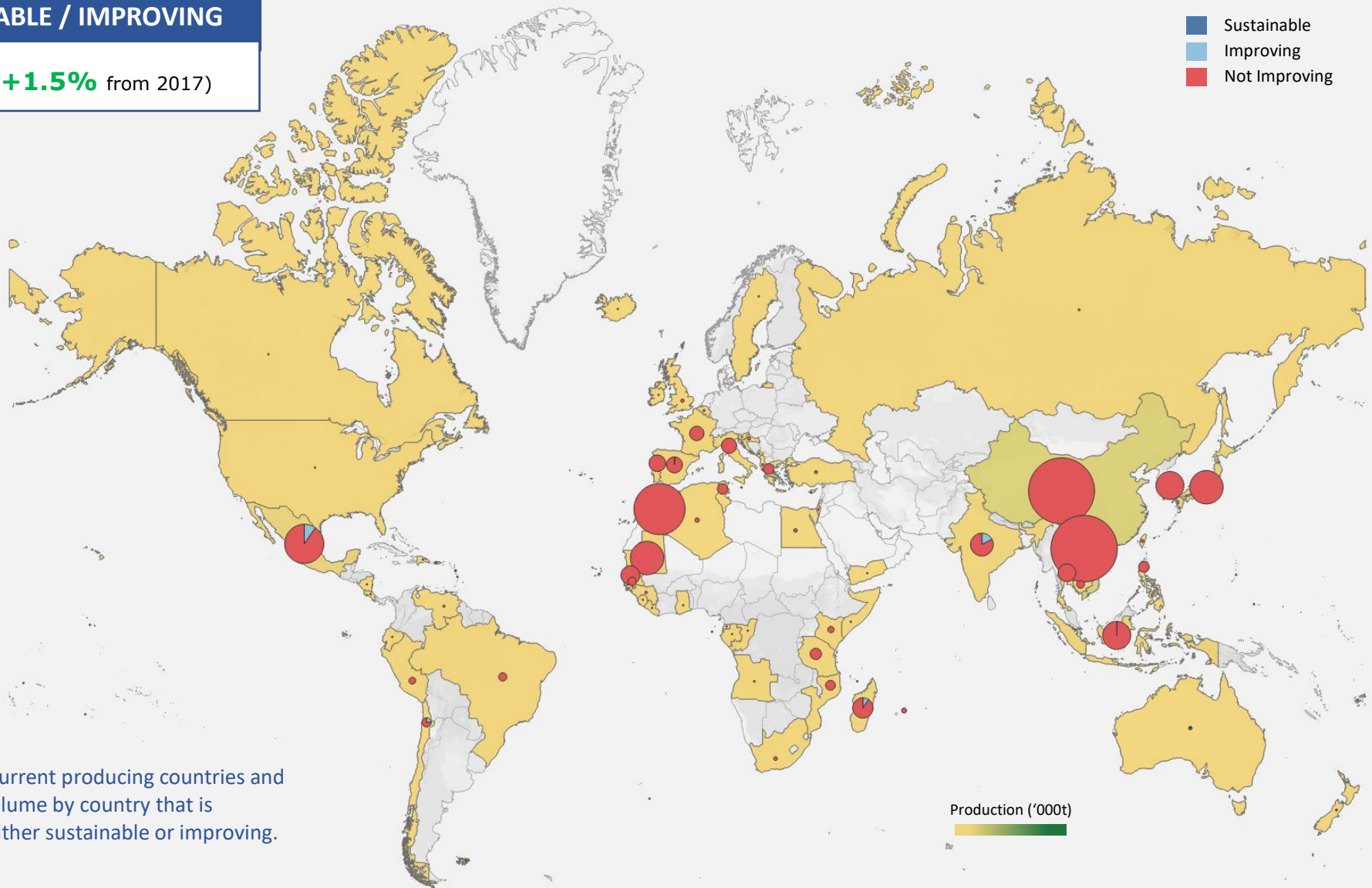


Figure 30 | Current producing countries and percent of volume by country that is considered either sustainable or improving.



Chilled cooked octopus in the Tsukiji seafood market, Tokyo, Japan.  
© DCChefAnna from Pixabay

# SWIMMING CRAB



Figure 31 | Time series of swimming crab production (area) and annual exports (bars)

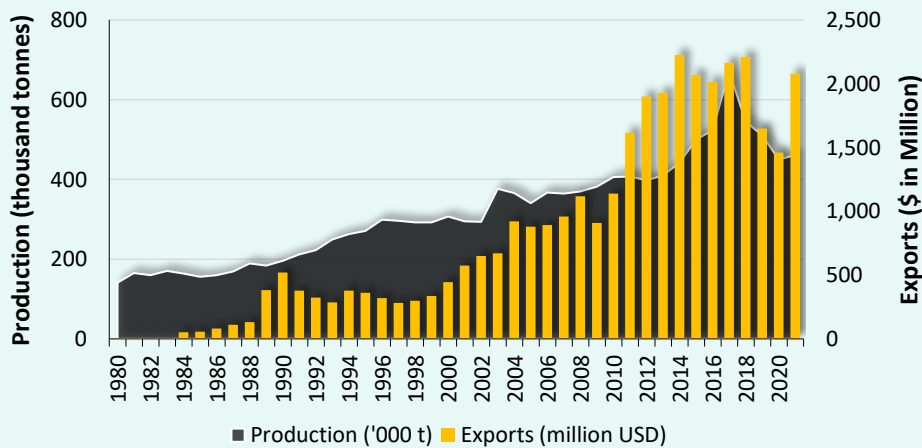


Table 21 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
China	117.4	26%	34%
Indonesia	99.5	22%	79%
United States	53.5	12%	46%
Mexico	41.9	9%	49%
Thailand	36.2	8%	12%
Philippines	32.2	7%	2%
Viet Nam	25.7	6%	0%
India	19.4	4%	17%
Other	34.1	7%	0%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Swimming crab is an important fishery resource within the scope of Target 75, with annual production around 500,000 tonnes in recent years (Figure 31). Virtually all (99.99%) production is from wild capture (FAO 2023b).
- Following an increasing trend from the late 1980s to 2017, global catches have been declining since, and are currently estimated at 460,000 tonnes.
- More than half (55%) of the swimming crab production is from blue swimming crab (*Portunus pelagicus*), which is captured in Western Pacific Ocean. Other relevant species is the blue crab (*Callinectes sapidus*), which represents 17% of global catches and is mostly captured in the Western Central Atlantic.
- Similar to snapper and grouper, data transparency and reporting is a challenge in this sector, with nearly 30% of the total capture reported in broader categories such as “Marine crabs nei” or “Marine crustaceans nei.”
- China is the most important fishing country, accounting for 26% of global catches. Other relevant countries are Indonesia (22%), the United States (12%), and Mexico (9%) (Table 21).
- Annual swimming crab exports have increased in recent years, reaching more than USD 2 billion in 2021 (FAO 2023a).
- The United States (47% of global imports by value) and Asia are the largest markets for swimming crab. Asia also dominates exports of swimming crab, with China, Indonesia, Viet Nam, and the Philippines alone representing more than three-quarters (77%) of the swimming crab exports by value (Table 22).

# SWIMMING CRAB

**Table 22 |** Bilateral trade flows showing the main swimming crab exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter \ Importer	United States	Japan	China	Malaysia	South Korea	Hong Kong	Canada	Taiwan	Indonesia	Singapore	Other	Total 2021 exports (USD million)	% of total exports
China	20%	25%	0%	18%	15%	6%	0%	7%	3%	1%	4%	672.34	32%
Indonesia	80%	3%	9%	3%	0%	1%	1%	0%	0%	1%	2.9%	613.25	30%
Viet Nam	36%	25%	26%	0%	1%	3%	1%	0%	1%	0%	7.2%	188.05	9%
Philippines	83%	0%	4%	0%	0%	7%	0%	4%	0%	1%	0%	164.24	8%
United States	0%	0%	43%	0%	0%	3%	44%	0%	5%	0%	4.0%	127.28	6%
India	58%	0%	18%	0%	0.3%	6.6%	2%	2%	0%	10%	2.4%	106.42	5%
Mexico	90%	0%	0%	0%	5%	0%	0%	0%	0%	0%	5%	67.36	3%
Thailand	35%	2%	38%	1%	2%	6%	4%	2%	1%	1%	8%	67.30	3%
Bahrain	8%	15%	0%	11%	23%	0%	0%	0%	9%	0%	34%	33.32	2%
Australia	1%	0%	73%	0%	0%	5%	6%	1%	1%	2%	12%	10.81	1%
<b>% of total imports</b>	<b>47%</b>	<b>12%</b>	<b>11%</b>	<b>7%</b>	<b>5%</b>	<b>4%</b>	<b>3%</b>	<b>3%</b>	<b>2%</b>	<b>1%</b>	<b>100%</b>		

**Notes:** (1) Except for some coldwater species, most traded crab is reported in broader categories such as "Crabs nei, frozen" or "Crabs, peeled or not, live, fresh or chilled, nei." Bilateral trade for swimming crab was thus inferred based on which countries report production, as well as other criteria. The estimates presented should thus be interpreted with caution, as these may include exports of other warmwater crab species.



# SWIMMING CRAB

## Status and recent progress against T75

- ⦿ **More than two-thirds (37%) of global swimming crab production is already considered sustainable or improving (Figure 32).**
- ⦿ Despite the slight decrease compared to last year (which may be mostly attributed to several Mexican Blue Crab FIPs being stalled due to a lack of recent progress updates), this represents an increase of 6.5% compared to 2017.
- ⦿ To reach the 75% target, production from Asia (mostly China but also Thailand and the Philippines) and the United States would need to be mobilized into improvement initiatives.
- ⦿ Learn more about SFP's 2023 Target 75 strategy and prioritized fisheries [here](#).



Blue swimming crab in a gillnet. © Shutterstock

## SFP initiatives updates

SFP's focus in the sector lies in advising and providing technical guidance and assistance to the [NFI Crab Council](#) where needed and engaging Indonesian fishers in long-term public-private alliances with management authorities to address governance gaps. With Indonesian blue swimming crab fisheries being predominantly small-scale, this work includes assisting fishermen to organize themselves and become an official part of co-management of the fisheries.

Below are some important recent highlights for this sector:

- ⦿ SFP continued providing regular technical, logistical, and organizational development support to the National BSC Fishers Network (Forkom Nelangsa). The network now represents 785 fishers, significantly surpassing the target of 200 fishers, and covering four provinces (<https://nelayanraijungan.org/anggota/>). Forkom Nelangsa is now considered a legitimate stakeholder by government for representing the voices of the fishers.
- ⦿ With assistance from the Taka Foundation and Forkom Nelangsa, SFP produced and distributed three best practice peer-to-peer learning videos.
- ⦿ SFP facilitated a meeting between PUSDATIN (MMAF's Center for Data, Statistics, and Information, which is responsible for registering small-scale fishers and providing KUSUKA cards) and Forkom Nelangsa. PUSDATIN provided access and training to Forkom Nelangsa to directly input data of BSC fishers network members and get fisher IDs.

# SWIMMING CRAB

SUSTAINABLE / IMPROVING

**37.3%** (+6.5% from 2017)

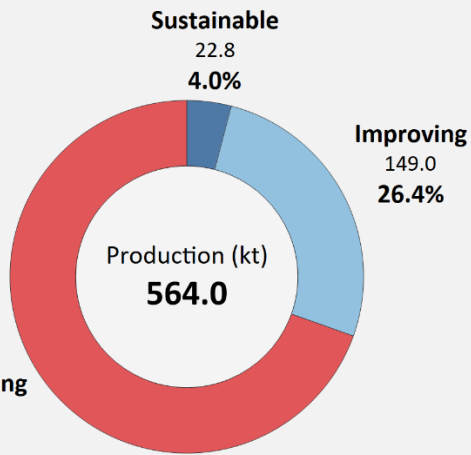
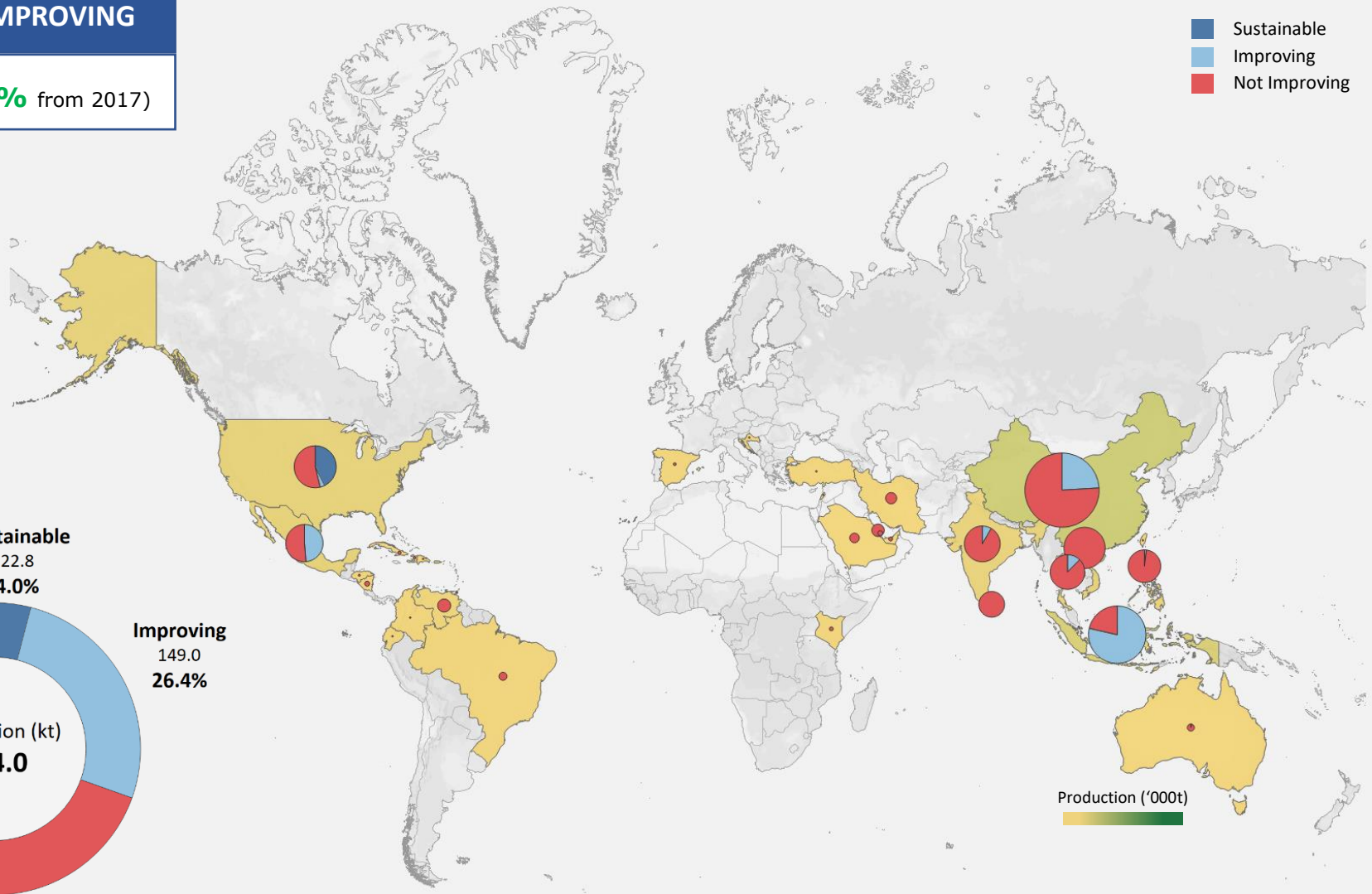


Figure 32 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# SMALL SHRIMP

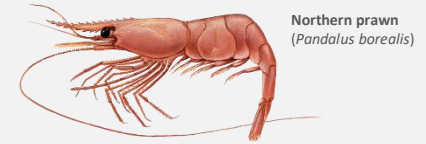


Figure 33 | Time series of small shrimp production (area) and annual exports (bars)

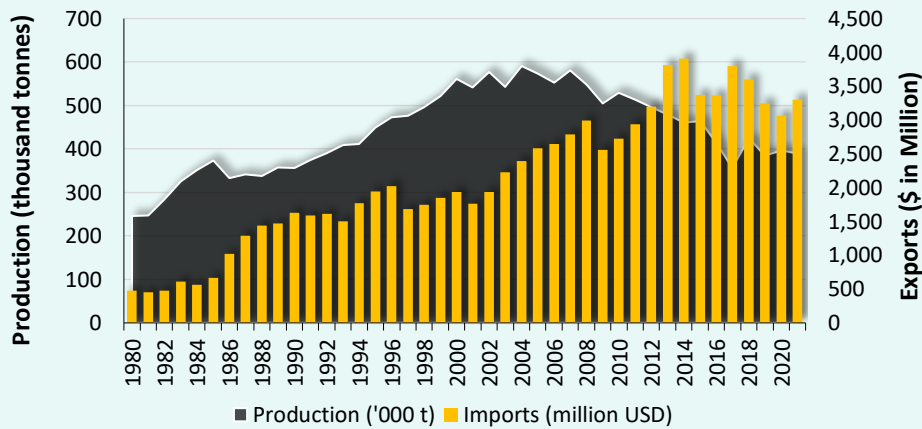


Table 23 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Greenland	106.7	27%	99%
Canada	67.8	17%	91%
Norway	34.4	9%	100%
United States	31.6	8%	98%
Russia	22.2	6%	54%
Netherlands	13.7	4%	100%
Brazil	13.1	3%	0%
Japan	11.6	3%	0%
Other	88.7	23%	37%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Small shrimp production (all from wild capture) experienced an increase until the mid-2000s and has been declining since.
- The top producing countries for small shrimp remain Greenland (27% of global catches), Canada (17%), Norway (9%), the United States (8%), and Russia (6%). Combined, these fishing countries contribute more than two-thirds (67%) of total production. Catches for these five countries have been relatively stable since 2018.
- In terms of species, northern prawn (*Pandalus borealis*) accounts for the majority (64% of global catches) of the small shrimp wild capture. The second and third most important species are Atlantic seabob (*Xiphopenaeus kroyeri*) and ocean shrimp (*Pandalus jordani*), each representing 8% of total catches.
- Annual exports of small shrimp displayed an increasing trend until 2014 and have remained stable since then, ranging from USD 3-4 billion per year.
- Northern European countries such as the Netherlands (23%), Denmark (18%), and Greenland (11%) continue to be the primary exporters, collectively accounting for more than half (52%) of the total value of exported small shrimp (2021 data) (SFP 2023c). The European Union, China, and the United States are the primary importers of this commodity (See Table 24).

# SMALL SHRIMP

**Table 24 |** Bilateral trade flows showing the main small shrimp exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

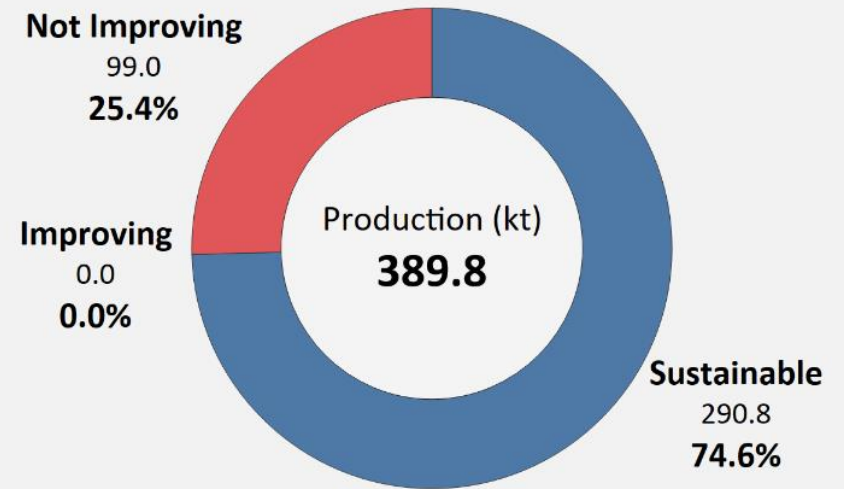
Importer \ Exporter	Germany	China	Denmark	United States	Belgium	United Kingdom	Sweden	France	Italy	Netherlands	Other	Total 2021 exports (USD million)	% of total exports
Netherlands	39%	0%	1%	0%	21%	1%	1%	9%	5%	0%	23%	742.9	23%
Denmark	7%	16%	0%	0%	0%	8%	17%	1%	5%	2%	44%	589.9	18%
Greenland	0%	0%	37%	0%	0%	0%	0%	0%	0%	0%	62%	367.7	11%
Canada	0%	38%	14%	8%	0%	13%	1%	0%	0%	1%	25%	308.6	9%
Ecuador	0%	11%	0%	64%	0%	0%	0%	3%	6%	0%	17%	232.9	7%
Belgium	16%	0%	1%	0%	0%	6%	0%	22%	8%	12%	34%	166.4	5%
Germany	0%	0%	15%	1%	1%	0%	1%	7%	7%	33%	33%	137.3	4%
Russia	0%	46%	0%	0%	0%	0%	0%	0%	0%	0%	53%	98.9	3%
France	31%	0%	1%	0%	20%	5%	0%	0%	7%	6%	30%	85.2	3%
Iceland	0%	1%	12%	0%	0%	86%	0%	0%	0%	0%	1%	60.4	2%
<b>% of total imports</b>	<b>12%</b>	<b>8%</b>	<b>7%</b>	<b>6%</b>	<b>5%</b>	<b>5%</b>	<b>5%</b>	<b>4%</b>	<b>4%</b>	<b>4%</b>	<b>39%</b>		

**Notes:** (1) The results presented might not fully depict the small shrimp trade patterns due to data limitations. Some shrimp is reported in broader categories as unspecified shrimp (FAO 2023c). In these cases, the differentiation between small and large shrimp was inferred based on production data from each country. (2) The percent exported per trade partner for Russia was inferred from mirror (imports) data.

# SMALL SHRIMP

## Status and recent progress against T75

- ⦿ **The small shrimp sector has been at or above the 75% target since 2021**, with no significant changes in the last couple of years ([Figure 34](#), [Figure 35](#)).
- ⦿ The majority of the sustainable production comes from sources with MSC certification, accounting for approximately 74.6% of the total sector.
- ⦿ With the exception of Russia (in which 52% of the catches are estimated as coming from either sustainable or improving sources), more than 75% of the production coming from the top six countries is already sustainable and improving.
- ⦿ In terms of species, northern prawn (*Pandalus borealis*) accounts for more than half (57%) of the MSC certified small shrimp. Next come ocean shrimp (*Pandalus jordani*) (8%) and common shrimp (*Crangon crangon*) (6%).
- ⦿ Learn more about SFP's 2023 Target 75 strategy and prioritized fisheries [here](#).



**Figure 34** | Estimated production and percent of Small shrimp production that is considered Sustainable, Improving, and Not Improving, as per [SFP's Target 75 initiative](#).

# SMALL SHRIMP

SUSTAINABLE / IMPROVING

**74.6%** (-2.2% from 2017)

- Sustainable
- Improving
- Not Improving

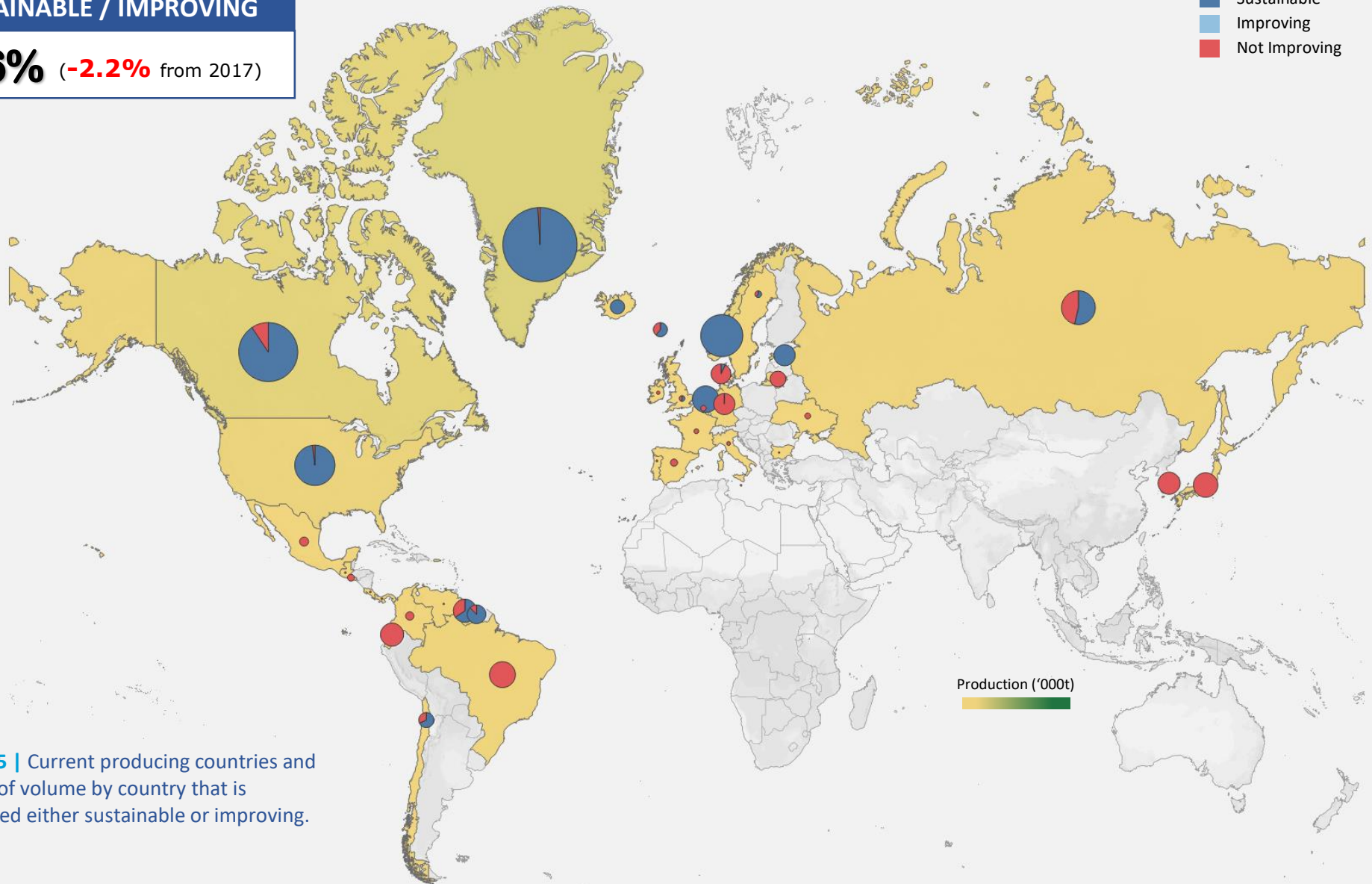


Figure 35 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# COLDWATER CRAB

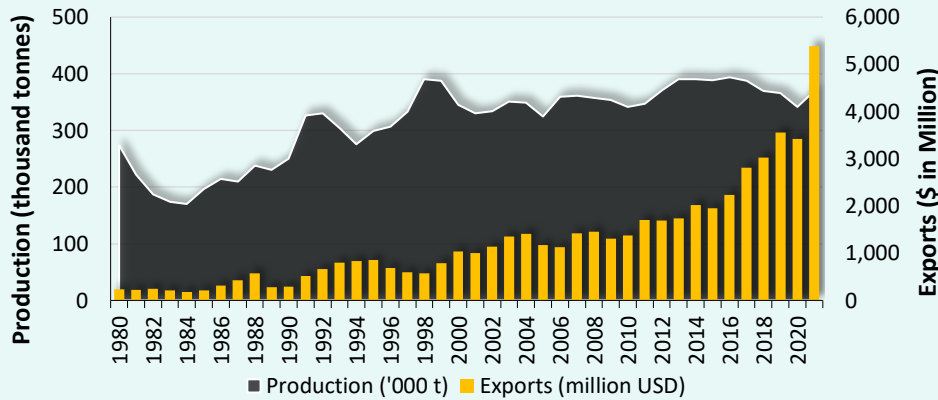


Edible (brown) crab  
(*Cancer pagurus*)



Red king crab  
(*Paralithodes camtschaticus*)

**Figure 36 | Time series of coldwater crab production (area) and annual exports (bars)**



**Table 25 | 2021 production and percent of volume that is sustainable/improving**

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Russia	96.5	26%	37%
Canada	89.0	24%	86%
United States	59.2	16%	46%
United Kingdom	27.3	7%	1%
South Korea	21.5	6%	0%
Japan	16.1	4%	0%
Norway	14.1	4%	46%
Chile	10.8	3%	7%
Other	35.0	9%	5%

**Note:** For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- Coldwater crab is a relatively small sector, with production (all from wild capture) of around 400,000 tonnes annually.
- Catches showed an increasing trend from the mid-1980s until the late 1990s and have been stable since (Figure 36). Russia (26%), Canada (24%), and the United States (16%) remain the top producing countries, accounting for approximately two-thirds (67%) of coldwater crab catches in 2021 (Table 25) (FAO 2023b).
- In terms of species, catches are dominated by queen crab (*Chionoecetes opilio*) (33% of global coldwater crab catches), Tanner crabs nei (*Chionoecetes* spp) (18%), and Edible crab (*Cancer pagurus*) (11%). More than 90% of the catches are from the North Atlantic (48%) and North Pacific (44%) oceans.
- Mirroring seafood as a whole, annual exports of coldwater crab have been increasing steadily over the last couple of decades and are currently at around USD 5 billion per year.
- In 2021, coldwater crab exports by value showed a sharp increase compared to the previous year. Besides the increased production (and quantity exported), this may be related to an increase in the coldwater crab price per kg.
- Russia remains the main exporter, accounting for nearly half (48%) of total exported coldwater crab by value (2021 data) (SFP 2022k). The other important exporter is Canada (33%). Most (50%) of the traded crab is estimated to be exported to the United States. Other main importers are Japan (17%) and China (11%) (see Table 26).
- Similar to other commodities, these numbers are approximate, as some of the traded crab is reported in broader categories (such as “crabs.”

# COLDWATER CRAB

**Table 26 |** Bilateral trade flows showing the main coldwater crab exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer											Total 2021 exports (USD million)	% of total exports
	United States	Japan	China	Malaysia	South Korea	Hong Kong	Canada	Taiwan	Indonesia	Singapore	Other		
Russia	41%	25%	13%	17%	0%	2%	0%	0%	0%	0%	1%	2,712.1	48%
Canada	81%	9%	8%	0%	0%	0%	0%	0%	0%	1%	1.3%	1,829.0	33%
Norway	41%	8%	10%	12%	0%	1%	6%	0%	4%	4%	14%	245.3	4%
United Kingdom	1%	11%	0%	0%	69%	1%	4%	1%	1%	1%	11%	118.3	2%
South Korea	13%	12%	24%	0%	1%	2%	33%	0%	0%	0%	14%	101.3	2%
Chile	21%	55%	0%	0%	1.2%	0.9%	0%	0%	0%	0%	21%	82.1	1%
United States	0%	0%	94%	0%	0%	6%	0%	0%	0%	0%	0%	80.2	1%
Greenland	48%	3%	2%	0%	0%	0%	0%	0%	47%	0%	1%	77.5	1%
Netherlands	0%	39%	0%	0%	7%	0%	0%	2%	4%	0%	47%	60.0	1%
France	0%	0%	0%	0%	0%	0%	0%	36%	2%	0%	61%	51.4	1%
<b>% of total imports</b>	<b>50%</b>	<b>17%</b>	<b>11%</b>	<b>9%</b>	<b>3%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>	<b>100%</b>		

Notes: (1) Based on mirror (imports) data as some countries (e.g., Russia) do not disclose the trade partner in their reported exports.



# COLDWATER CRAB

## Status and recent progress against T75

- ⦿ **More than one-third (40%) of global coldwater crab production is considered sustainable or improving (Figure 37).**
- ⦿ This sustainable or improving supply is coming mostly from North America (US and Canada) and Russia, where more than one-third of the production is already either certified or in a FIP.
- ⦿ The almost 10 percentage points drop in sustainable or improving supply compared to last year is primarily due to several FIPs from Ireland, the United Kingdom, and Russia (e.g., Russian Far East Crab) that have not reported any recent progress (i.e., are stalled).
- ⦿ To reach the 75% target, the remaining production from North America, Europe, and Asia (namely South Korea and Japan) would need to be mobilized into improvement initiatives.
- ⦿ Learn more about SFP's 2023 Target 75 strategy and prioritized fisheries [here](#).

## SFP initiatives updates

SFP's focus in the sector lies in actively engaging mid-upper and end markets in SFP's [Protecting Ocean Wildlife](#) initiative to reduce the bycatch of endangered, threatened, and protected species in US and Canadian coldwater crab and lobster fisheries. Below are some highlights and updates on recent market-based activities in this sector:

- ⦿ In October 2023, SFP coordinated and facilitated a panel at the [Responsible Seafood Summit](#) about successful on-demand gear use in the Canadian snow crab fishery. The panel demonstrated that, with collaboration, on-demand gear is proving to be a viable solution to fishery closures and whale entanglements.
- ⦿ In March 2023, SFP hosted an [On-Demand Gear Showcase](#) at the Seafood Expo North America in Boston, and invited major seafood buyers to see the gear, speak with fishers who are currently trialing the gear, and talk with other stakeholders who are involved in gear trials, including the Northeast Fisheries Science Center. It included six of the leading on-demand gear manufacturers and was attended by retailers, including Publix, Sam's Club, and Aldi, as well as some of the largest US seafood distributors and fishers from New England pot/trap fisheries.

# COLDWATER CRAB

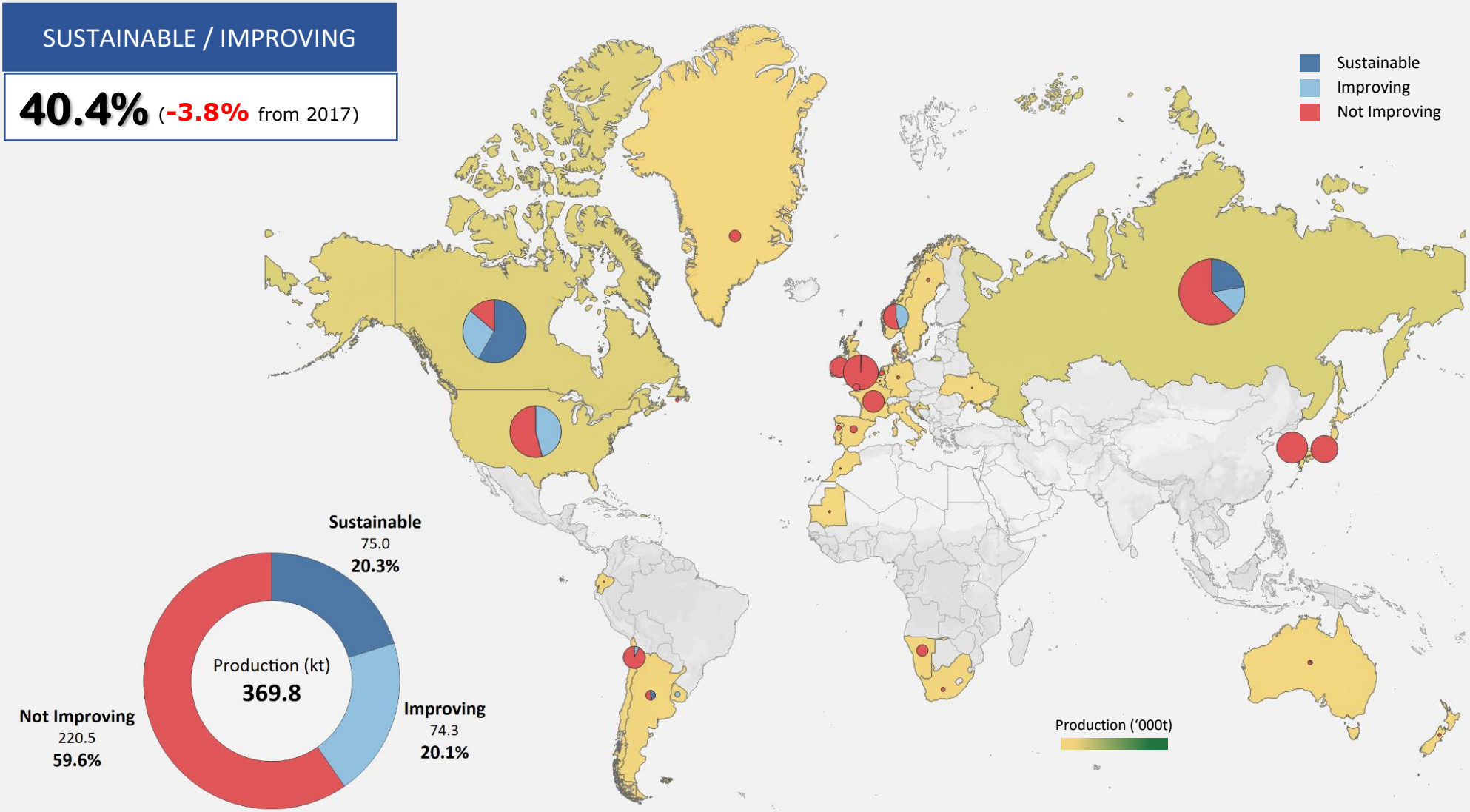
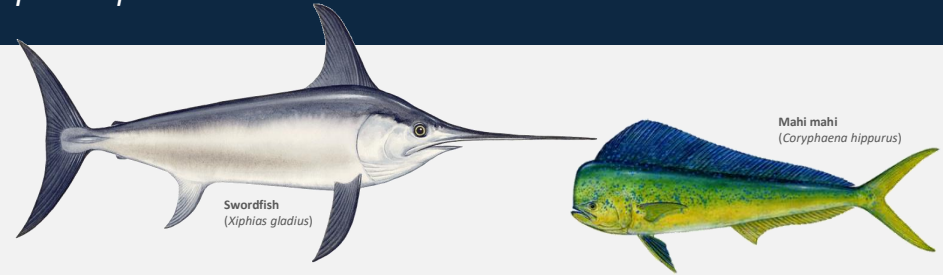


Figure 37 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# LARGE PELAGICS



## Sector definition and scope

- 🕒 Large pelagics is a relatively small T75 sector, with mostly steady annual landings in the last decade of about 200,000 tonnes. All of the sector production is from wild capture.
- 🕒 This sector includes only two species, mahi-mahi (*Coryphaena hippurus*) and swordfish (*Xiphias gladius*).
- 🕒 Despite having relatively similar landings in recent years (c. 100,000 tonnes per year), the main fishing areas and top fishing countries are relatively distinct for these two species:
  - For swordfish, most catches are from the Indian Ocean, with Spain, Ecuador, and Japan as the main fishing countries.
  - Most mahi is reported to be captured in the Pacific Ocean, by Peru, Indonesia, and Ecuador.
- 🕒 In terms of trade flows, swordfish and mahi also have relatively different markets. Almost all the traded mahi is exported to the United States, mostly coming from Latin America. For swordfish, Europe is both the most important exporter and importer, accounting for almost two-thirds (65%) of the imports by value.

## T75 status and current strategic priorities

- 🕒 **The large pelagics sector as a whole is halfway to the 75% target, with 45% of production classified as sustainable/improving (Figure 38).**
- 🕒 As with production and trade, each of the two species/subsectors present relatively distinct results (Figure 2, p.7):
  - For [mahi](#), around two thirds (66%) of global production is already coming from sustainable/improving fisheries. This achievement is primarily driven by continued market pressure and support in the Eastern Pacific Ocean fisheries, prompting major fisheries to join fishery improvement projects (FIPs) to meet procurement requirements.
  - For [swordfish](#), only about one-fifth (19%) of global production is coming from fisheries considered sustainable or improving. This is mostly due to fisheries that continue to join the MSC program, but also some FIPs.
- 🕒 Learn more about SFP’s 2023 Target 75 strategy and prioritized fisheries for this sector [here](#).
- 🕒 Given the considerable differences between the two species/subsectors, a more detailed update for each subsector is provided in the following sections.

# LARGE PELAGICS

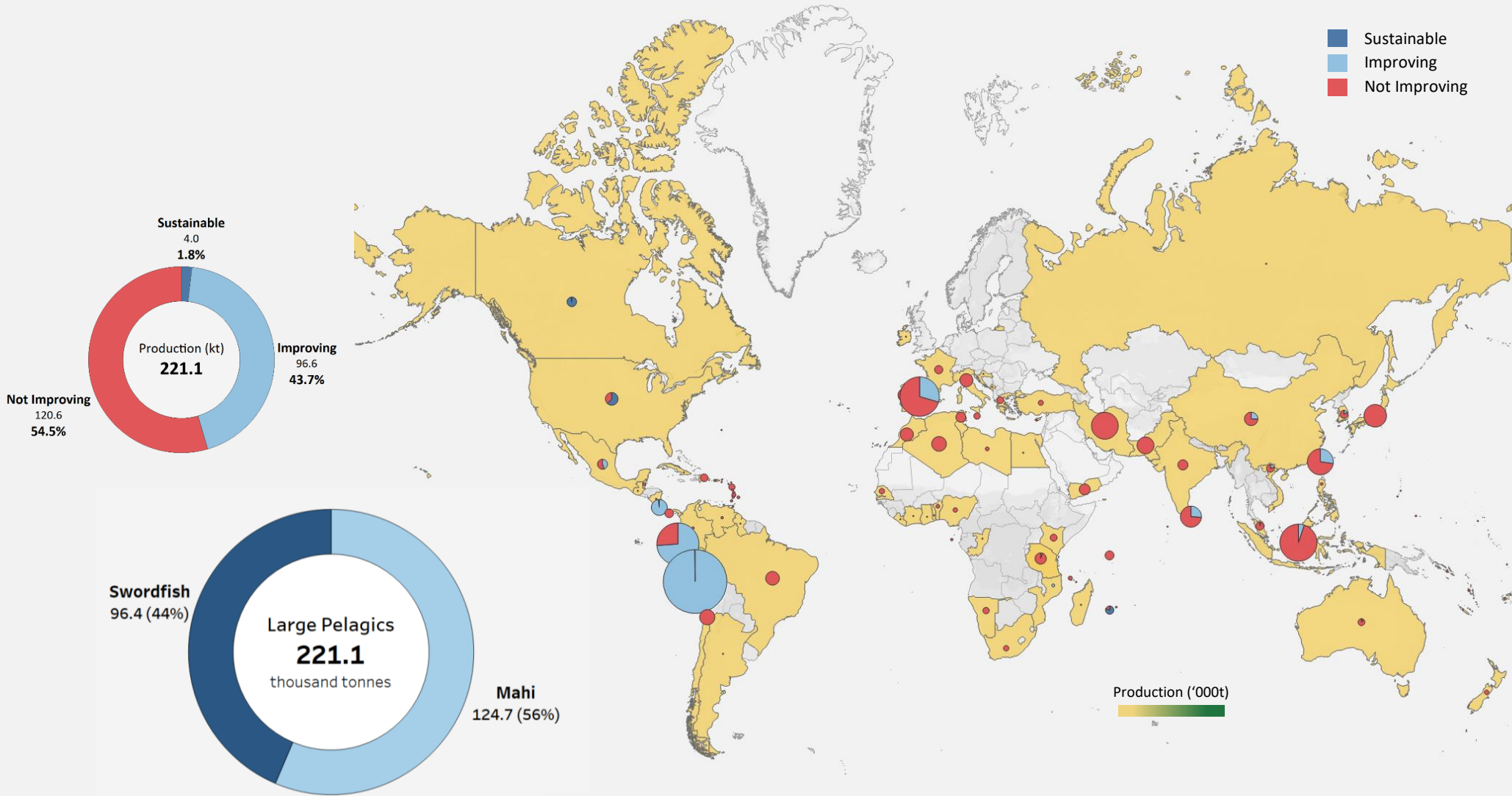


Figure 38 | Current Target 75 status for the overall large pelagics sector (top left), production by subsector (bottom left), producing countries covered, and percent of volume by country that is considered either sustainable or improving (map).

# LARGE PELAGICS: MAHI

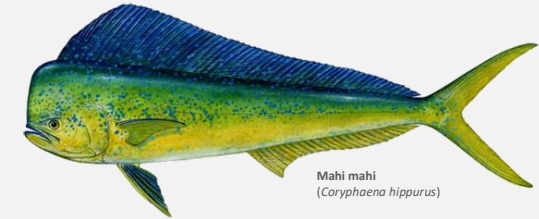


Figure 39 | Time series of mahi-mahi production (area) and annual imports (bars)

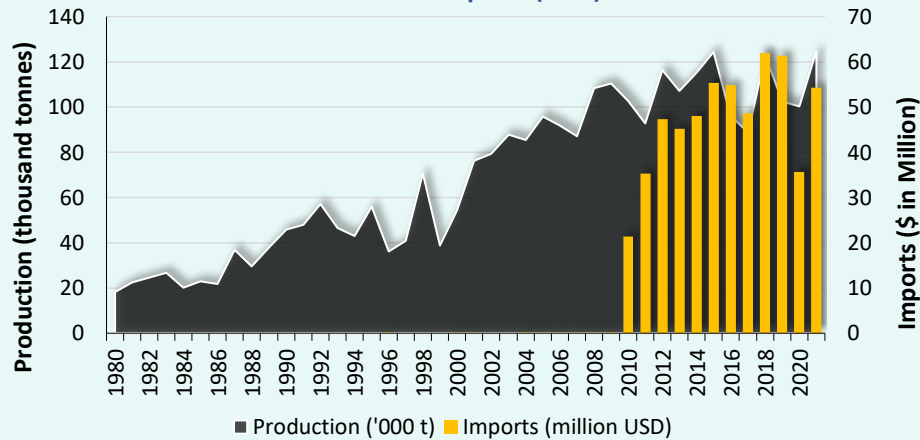


Table 27 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Peru	59.4	48%	100%
Indonesia	18.4	15%	0%
Ecuador	17.6	14%	100%
Iran	9.5	8%	0%
Pakistan	4.2	3%	0%
Taiwan	3.1	2%	87%
Costa Rica	2.8	2%	100%
Dominican Republic	0.9	1%	0%
Other	8.7	7%	0%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- The annual catches of mahi-mahi (or dolphinfish) are relatively small, ranging between 100,000 and 120,000 tonnes in recent years (Figure 39) (FAO 2023b).
- Reported catches increased until 2014 and have remained relatively stable since then.
- The majority of mahi-mahi is captured in the Eastern Pacific Ocean, with Peru accounting for 48% of global catches, followed by Indonesia (15%) and Ecuador (14%) (Table 27).
- Small-scale fishing gear (e.g., nets) and purse seines are the two most important gear types in terms of mahi catches (Pauly et al 2024).
- Following an increasing trend until 2019, global imports of mahi-mahi decreased sharply in 2020, and then slightly recovered partially to USD 54 million in 2021 (FAO 2023a).
- Nearly all traded mahi-mahi is imported to the United States, primarily from Latin American countries such as Ecuador, Panama, and Costa Rica (Table 28). However, the numbers on mahi trade for most countries are very likely underestimated due to deficient reporting.

# LARGE PELAGICS

## MAHI

**Table 28** | Bilateral trade flows showing the main mahi exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. **FAO FishstatJ**.

<b>Importer</b> <b>Exporter</b>	United States	Dominican Republic	Ecuador	Antigua and Barbuda	<b>Total 2021 exports (USD million)</b>	<b>% of total exports</b>
Ecuador	100%	0%	0%	0%	20.42	38%
Panama	99%	0%	1%	0%	10.57	19%
Costa Rica	100%	0%	0%	0%	8.86	16%
Guatemala	100%	0%	0%	0%	4.60	8%
Nicaragua	99%	0%	1%	0%	2.83	5%
El Salvador	100%	0%	0%	0%	1.95	4%
Brazil	91%	9%	0%	0%	1.74	3%
Venezuela	90%	7%	3%	0%	1.11	2%
China	0%	100%	0%	0%	0.60	1%
Mexico	100%	0%	0%	0%	0.40	1%
Japan	100%	0%	0%	0%	0.30	1%
India	0%	100%	0%	0%	0.25	0%
Dominican Republic	100%	0%	0%	0%	0.13	0%
Peru	66%	26%	8%	0%	0.12	0%
<b>% of total imports</b>	<b>97%</b>	<b>2%</b>	<b>1%</b>	<b>0%</b>		

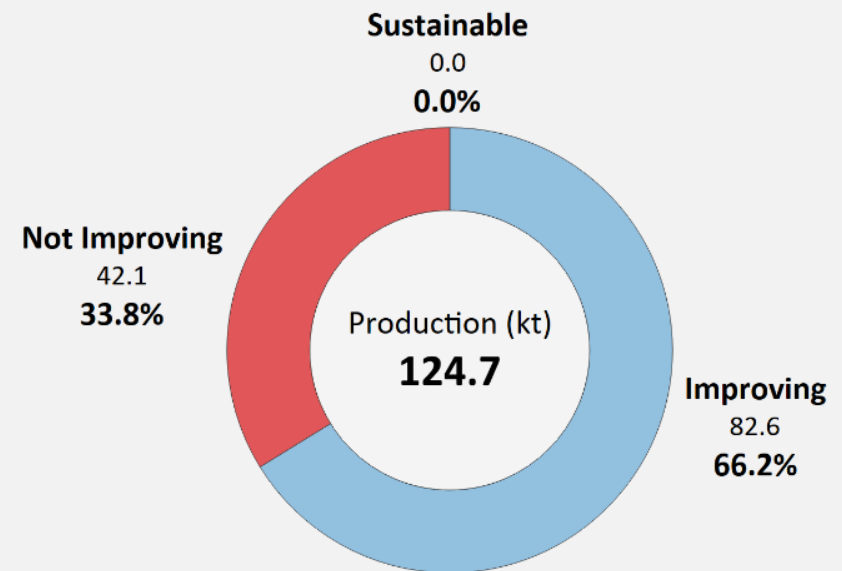
**Notes:** (1) The values presented are based on mirror (imports) data. (2) Mahi estimated trade for some countries as Peru is likely higher, and may not be depicted due to deficiencies in reporting (i.e., some of the traded mahi is likely reported under broader categories such as frozen pelagic fish, and not considered here).

# LARGE PELAGICS

## MAHI

### Status and recent progress against T75

- Currently, **around two-thirds (66%) of global mahi-mahi production is considered sustainable or improving (Figure 40)**. This supply primarily comes from the Eastern Pacific Ocean (EPO), specifically from fishery improvement projects (FIPs) that cover the majority of production from Peru, Ecuador, and Costa Rica.
- The observed increase in sustainable or improving supply compared to 2017 (+7%) is mainly attributed to a recent increase in Peruvian and Ecuadorian catches, which are covered by FIPs. These interannual oscillations impact considerably the percentage of improving supply.
- To achieve Target 75, it is crucial to promote and support improvement initiatives in the Western Pacific and Indian oceans, involving countries such as Indonesia and Taiwan
- Learn more about SFP’s 2023 Target 75 strategy and prioritized fisheries [here](#)



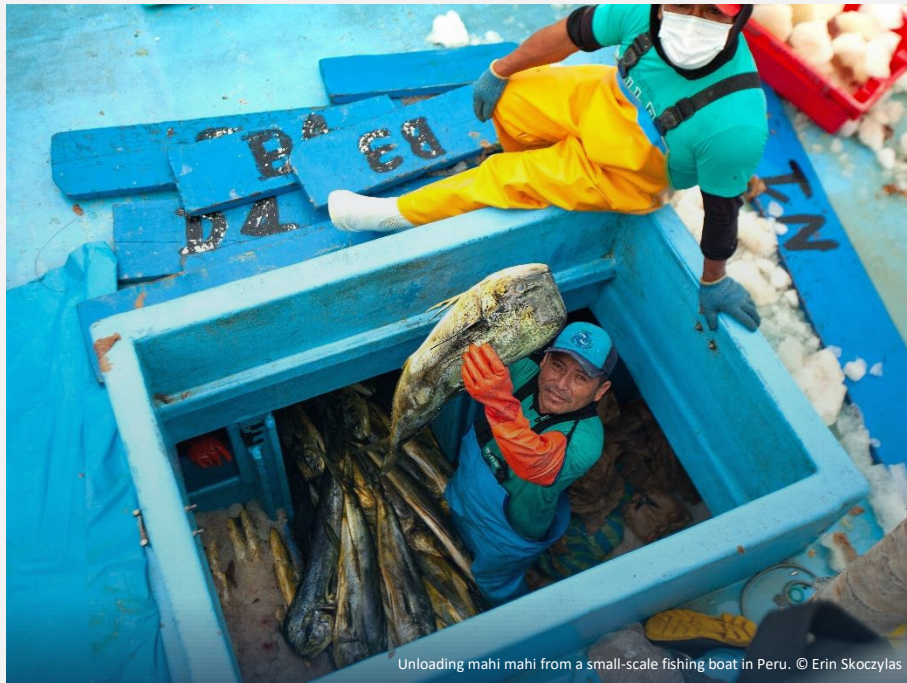
**Figure 40** | Total estimated production, and percent of mahi mahi production that is considered Sustainable, Improving, and Not Improving, as per [SFP’s Target 75 initiative](#).

# LARGE PELAGICS

## MAHI

### SFP initiatives updates

SFP's focus in the sector lies in actively engaging mid-upper and end markets in promoting improvements within mahi-mahi fisheries via the [Global Mahi SR](#) and engaging fishers and processors from producing countries in long-term public-private alliances with management authorities to address governance gaps.



The SR is supporting the development of fit-for-purpose solutions and sourcing commitments that will reduce and mitigate bycatch in global mahi fisheries, but also continues to engage with national governments, research institutes, industry, and other partners in support of projects to advance the science and research needs for mahi and efforts to ensure inclusive management and governance systems are in place.

Below are some highlights and updates on recent activities in this sector and the respective Supply Chain Roundtable.

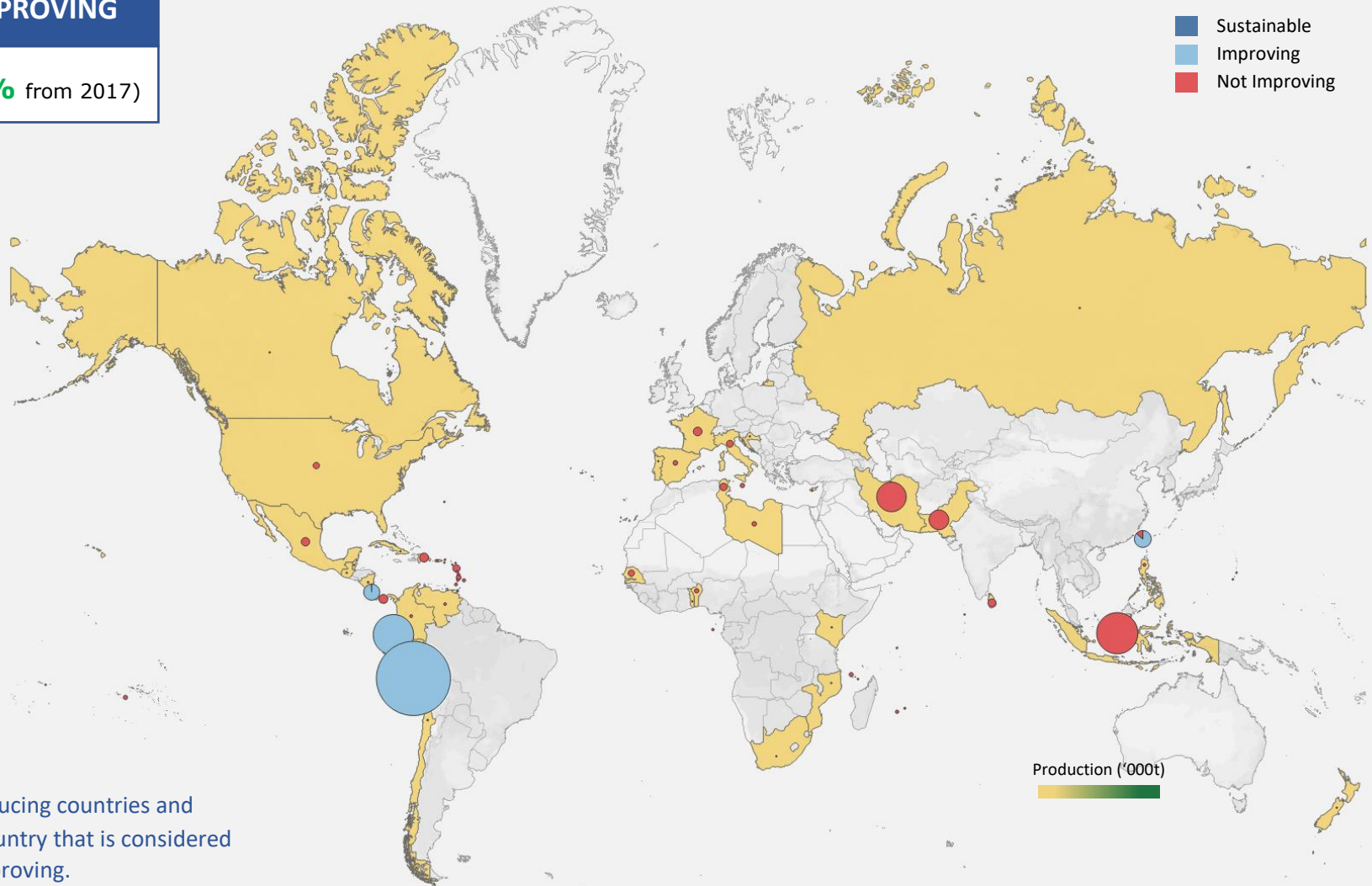
- ⦿ A [new sector report](#) by SFP found that management is largely ineffective in controlling exploitation levels and adequately addressing and mitigating bycatch of ETP species.
- ⦿ To assist the SR in understanding bycatch-related issues in global mahi fisheries and potential areas for improvements to bycatch reduction and mitigation in their mahi supply chains, a literature review and briefing were prepared that will be used to identify bycatch reduction and mitigation strategies that mahi FIPs need to consider and SR participants can consider to set targets for testing and implementing strategies with their FIP suppliers.
- ⦿ An [historic achievement](#) will enable 930 mahi-mahi and squid artisanal vessels to operate legally in Peruvian waters.



# LARGE PELAGICS: MAHI

SUSTAINABLE / IMPROVING

**66.2%** (+6.8% from 2017)



**Figure 41** | Current producing countries and percent of volume by country that is considered either sustainable or improving.



Hooked mahi mahi underwater.  
© Shutterstock

# LARGE PELAGICS: SWORDFISH

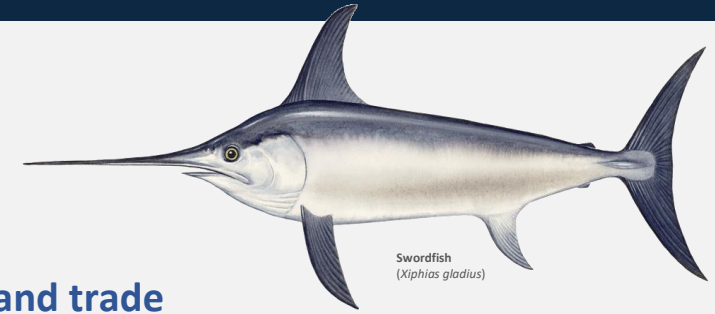


Figure 42 | Time series of swordfish production (area) and annual exports (bars)

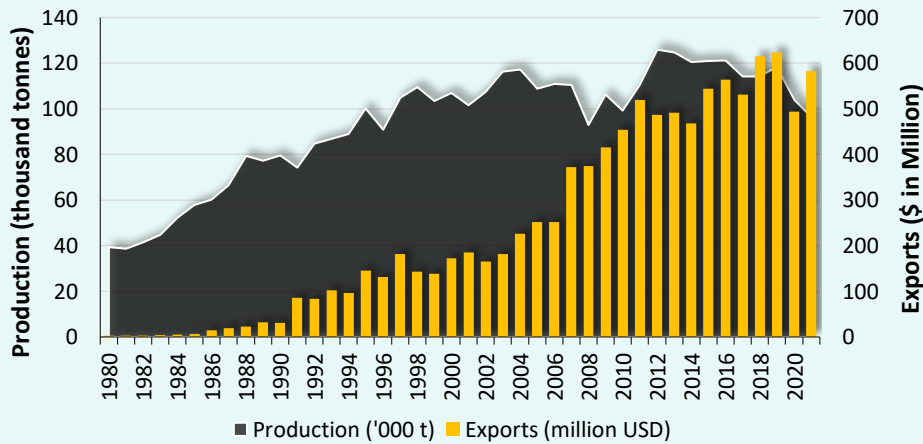


Table 29 | 2021 production and percent of volume that is sustainable/improving

Country	Production ('000 t)	% of sector total	% Sustainable/Improving
Spain	22.7	24%	30%
Ecuador	8.5	9%	20%
Japan	7.4	8%	0%
Taiwan	6.8	7%	0%
Sri Lanka	5.9	6%	29%
Chile	3.4	4%	0%
Algeria	3.2	3%	0%
Portugal	2.8	3%	0%
Other	35.6	37%	22%

Note: For more data visualizations on the production and status by region, species, and other criteria, please check the [Overall T75 progress](#) and [2023 status by sector](#) Tableau dashboards.

## Production and trade

- ⦿ Swordfish global catches are relatively small compared to other commodities. Annual global catches showed an increasing trend until 2012, and have been decreasing slowly since (Figure 42). In 2021, total capture was estimated at 96,000 tonnes, the lowest recorded value since 2008 (FAO 2023b).
- ⦿ Spain (24%), Ecuador (9%), Japan (8%), and Taiwan (7%), remain the top fishing countries, accounting for almost half of total swordfish wild capture (Table 29) (FAO 2023b). Most swordfish are captured by the distant-water longline fleets (Pauly et al 2024).
- ⦿ As with most seafood commodities, annual exports of swordfish have been increasing steadily and reached a historical record high in 2019 (USD 620 million). In 2020, annual exports dropped (likely due to the impact of COVID), but increased again in 2021, to around USD 580 million. Most swordfish are traded frozen or fresh/chilled (FAO 2023a).
- ⦿ Spain, Portugal, Ecuador, and South Korea remain the most important exporters, accounting for almost two thirds (57%) of total exported swordfish (2021 data). China and Indonesia are becoming more prominent exporters, whereas Taiwan exports have been dropping (FAO 2023a, 2023c).
- ⦿ Most of the swordfish is destined for the European market (more than 60% reported imports by value) (see Table 30).

# LARGE PELAGICS

## SWORDFISH

**Table 30 |** Bilateral trade flows showing the swordfish exporters in 2021 and their top trade partners, by percentage of each country's total exports and respective market shares. Source: **FAO FishstatJ**.

Exporter	Importer											Total 2021 exports (USD million)	% of total exports
	Italy	Spain	United States	Japan	South Korea	Portugal	France	Thailand	Malaysia	Viet Nam	Other		
Spain	85%	0%	1%	0%	0%	6%	4%	0%	0%	0%	3%	172.03	30%
Portugal	15%	85%	0%	0%	0%	0%	0%	0%	0%	0%	0.4%	67.95	12%
Ecuador	0%	16%	63%	0%	1%	19%	0%	0%	0%	0%	0.5%	45.40	8%
South Korea	44%	0%	1%	49%	0%	2%	0%	0%	0%	0%	3%	40.04	7%
China	10%	2%	0%	12%	39%	4%	0%	0%	0%	11%	22%	32.02	5%
Taiwan	1%	0%	0%	40%	42%	0.0%	0%	0%	0%	5%	11%	28.29	5%
Indonesia	38%	5%	12%	7%	1%	26%	1%	0%	0%	2%	8%	24.60	4%
Oman	0%	0%	3%	0%	13%	0%	0%	37%	32%	1%	14%	24.42	4%
Chile	20%	30%	9%	0%	0%	5%	35%	0%	0%	0%	1%	15.59	3%
Canada	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	12.40	2%
<b>% of total imports</b>	<b>36%</b>	<b>15%</b>	<b>15%</b>	<b>8%</b>	<b>6%</b>	<b>5%</b>	<b>3%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>8%</b>		

# LARGE PELAGICS

## SWORDFISH

### Status and recent progress against T75

- ⦿ **Nineteen percent of global swordfish production is considered sustainable or improving (Figure 43).** Most of this is coming from MSC-certified fisheries and FIPs in the North Atlantic and Pacific oceans.
- ⦿ Similar to other sectors, there has been a considerable increase of FIPs and MSC fisheries over the last decade. However, this subsector is still far from reaching the 75% target.
- ⦿ To reach the 75% target, the remaining production from North America, Europe, and Asia (namely South Korea and Japan) would need to be mobilized into improvement initiatives.
- ⦿ Learn more about SFP's 2023 Target 75 strategy and prioritized fisheries [here](#).



Swordfish in fish auction. Honolulu, Hawaii, USA. © Pedro Veiga

# LARGE PELAGICS: SWORDFISH

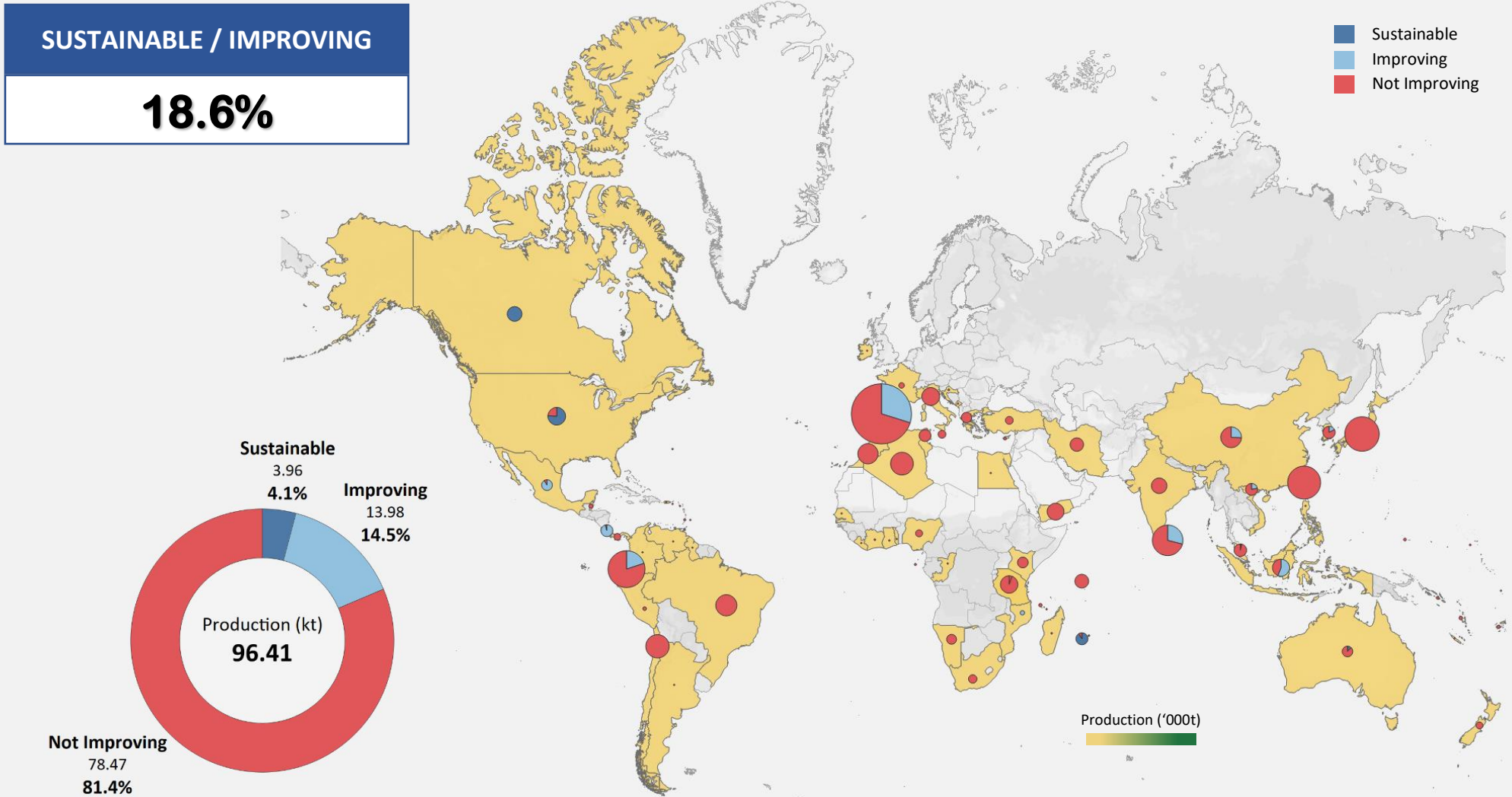
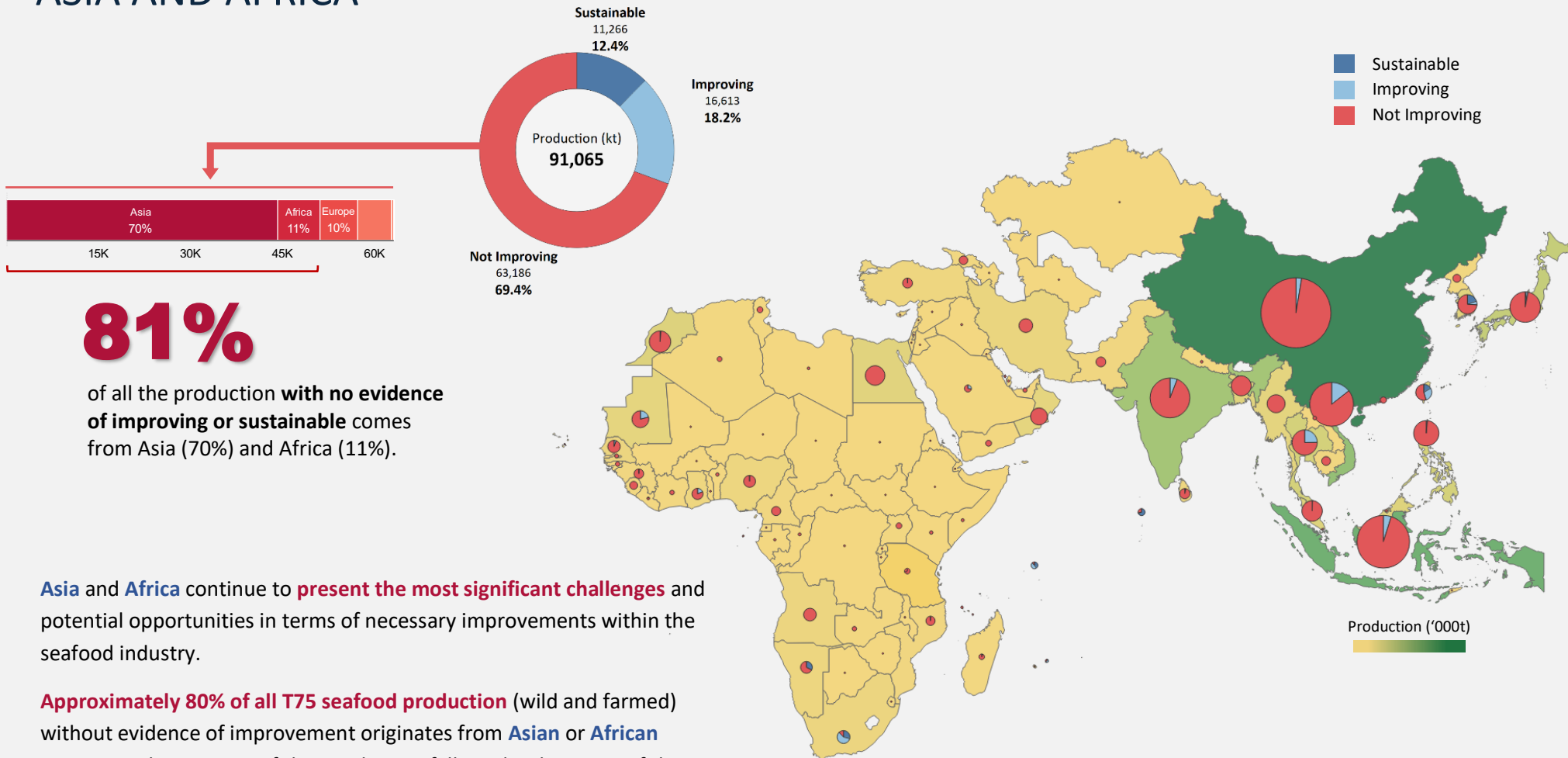


Figure 43 | Current producing countries and percent of volume by country that is considered either sustainable or improving.

# GEOGRAPHICAL PRIORITIES

## ASIA AND AFRICA



Asia and Africa continue to present the most significant challenges and potential opportunities in terms of necessary improvements within the seafood industry.

Approximately 80% of all T75 seafood production (wild and farmed) without evidence of improvement originates from Asian or African countries. The majority of this production falls under the scope of the Marine Ingredients sector, which consists entirely of wild-caught seafood.

These regions, with a few exceptions, generally lack sufficient management and data collection practices. Moreover, certifications, improvement projects, or other initiatives to promote sustainable exploitation and protect fishers' rights have yet to be implemented on a broad scale in these areas.

# FINAL REMARKS

- 🕒 The [Target 75](#) initiative was created with the goal of working with all seafood sectors to ensure that 75% of seafood (by volume) in [13 key sectors](#) is either sustainable or making regular, verifiable improvements.
- 🕒 Since the initiative's launch eight years ago, some of the seafood sectors have made noticeable progress.
  - **There are currently five sectors/subsectors that are above or close to the 75% target:** wild classic whitefish (82%), classic reduction (75%), small shrimp (75%), salmon (72%), and mahi (66%).
  - Of these, only one sector – small shrimp – was already at 75% when the initiative was publicly launched in 2017.
  - Furthermore, there are several other sectors or subsectors that have reached the halfway point toward the 75% target, including tuna (57%), coldwater crab (40%), and swimming crab (37%), while others have made significant strides since the initiative's inception (e.g., tuna and squid).
- 🕒 This progress would not have been possible without the **continuous efforts and the influence of market-based approaches to drive improvements in fisheries and aquaculture units worldwide**, with the ultimate goal of promoting more sustainable practices. A notable example is SFP's [Supply Chain Roundtables](#), which have played a crucial role in facilitating improvements in several sectors, and many fisheries globally.
- 🕒 Since the early 2000s, when the first [fishery improvement project \(FIP\)](#) was established, the **number of FIPs initiated globally has been increasing steadily**. These initiatives now cover a growing range of regions, flag countries, fleet types, and species. [More than 320 FIPs have been initiated to date](#) (SFP and UW 2023), impacting multiple stocks and contributing to the improvement of more than 13 million tonnes of wild production annually. The same holds true for the number of certified fisheries under schemes for wild production such as the [Marine Stewardship Council \(MSC\)](#), [MarinTrust](#), or [Certified Seafood Collaborative \(CSC\) RFM](#).
- 🕒 In the case of farmed production, the sustainability movement is relatively more recent, but currently, several million tonnes are estimated to come from farms that are either certified or engaged in an [aquaculture improvement project \(AIP\)](#).
- 🕒 Nevertheless, when considering all sectors collectively, achieving the 75% target is still a considerable distance away. This is primarily due to the inherent challenges and complexities associated with certain seafood sectors (e.g., octopus, snapper-grouper), regions, and fisheries/aquaculture operations.
- 🕒 In regions such as **Asia and Africa** — which collectively contribute almost two-thirds of global seafood production under the T75 scope and are key players in sectors like snapper-grouper, farmed whitefish, and octopus — there is a **widespread deficiency in effective management and data-collection practices**. These shortcomings hinder the optimal management of these, predominately small-scale, fisheries. **In many of these countries, sustainability measures are still in the early stages of development**, resulting in **limited implementation of improvement initiatives on a broad scale**.
- 🕒 Furthermore, **there are additional complex and persistent challenges that require attention**. These challenges include **protecting marine biodiversity, ensuring inclusion of small-scale fishers and fisheries, improving fisheries policy and management, and promoting regenerative aquaculture**.
- 🕒 In parallel to Target 75, [SFP's dedicated initiatives](#) tackle these challenges, with a focus on increasing industry capacity and leadership.





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14 LIFE BELOW WATER



## FURTHER INFORMATION

<http://www.sustainablefish.org/>

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