

# 2021

## Sector Sustainability Update



# WILD CLASSIC WHITEFISH

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# WILD CLASSIC WHITEFISH

## 2021 Sector Sustainability Update



Source: NOAA

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# SUMMARY

## Production and trade

- **Wild classic whitefish** remains **one of the largest and fastest growing seafood sectors** by production and traded volume.
- Production in **2019** exceeded **7.6 million tonnes**.
- Wild classic whitefish production is dominated by two species: **Alaska pollock** (*Gadus chalcogrammus*, 45.8 percent) and **Atlantic cod** (*Gadus morhua*, 14.8 percent).
- **Russia is the top producing country**, with almost 2.4 million tonnes (**31.3 percent of the total catch**) produced in 2019, followed by the United States with about 2 million tonnes (**27.3 percent**).
- Wild classic whitefish remains one of the most economically important seafood commodities globally, with reported trade of more than USD 16 billion in 2019.
- **Russia and China (14 percent each)** are currently the **top exporters by value**. China also had the highest increase (12.7 percent) in market share in the last decade, as well as the largest growth in imports. **Europe** remains the **most important end market**, accounting for about 46 percent of wild classic whitefish imports by value in 2019.
- While not captured by the data in this report, the February 2022 Russian invasion of Ukraine and subsequent trade sanctions and market and consumer reactions are significantly impacting the wild classic whitefish sector and creating uncertainties for supply chains and sustainability.

## T75 status and current strategy priorities

- **70.3 percent** (more than 5.3 million tonnes) of global wild classic whitefish production is currently estimated to be either **sustainable or improving**.
- To reach the 75-percent target, it will be necessary to reinvigorate stalled FIPs and catalyze improvements in fisheries with no prior sustainability initiatives.
- At the same time, issues such as climate change; interactions with endangered, threatened, and protected species; poor data transparency; and the Russian invasion of Ukraine threaten existing sustainability efforts and certifications.

## DISCLAIMER

This report was prepared with information from multiple sources, accessed in late September 2021. 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 the sector. 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.



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Atlantic cod (*Gadus morhua*) © Per Harald Olsen/NTNU Wikimedia Commons



# THE TARGET 75 INITIATIVE

Sustainable Fisheries Partnership (SFP) applies a sectoral approach to its mission of making actionable information available to the seafood 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-percent sustainable seafood. **T75 aims to ensure that 75 percent 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.





# 1

## WILD CLASSIC WHITEFISH SECTOR

This sector consists **primarily** of species such as **pollock**, **cod**, **haddock**, and other marine groundfish that are **entirely wild-caught**.

The most relevant species by production volume are Alaska pollock (*Gadus chalcogrammus*) and Atlantic cod (*Gadus morhua*), which together represent more than 60 percent of total catches in the wild classic whitefish sector.

More than half of wild classic whitefish production comes from Russia and the United States, but Norway, Iceland, and Argentina also contribute considerable production. The majority of the production in this sector is exported to European markets.

More information on the definition and scope of this and other Target 75 sectors is available [here](#).



Pollock caught during an acoustic trawl survey, Alaska © NOAA Wikimedia Commons

## 2 SCOPE AND OBJECTIVES

This report provides a quick summary update on progress so far for the wild classic whitefish sector against the 75-percent goal, in terms of volume of production that is already considered either sustainable or improving. The update also includes highlights on which sources of production had the most relevant changes, as well as the most recent trends in production and trade.

For the purposes of this analysis, we define a fishery as “sustainable” if it is Marine Stewardship Council (MSC)-certified or green-listed in SFP’s Metrics tool. We define a fishery as “improving” if it is certified by one of the following programs: MarinTrust, ASMI RFM, Iceland Responsible Fisheries, Fair Trade USA; if it is under full assessment in the MSC program; or if it is in a fishery improvement project (FIP) that is making good progress (i.e., with a progress rating of A, B, or C, or formed within the last 12 months but still unrated), using SFP’s FIP Evaluation Tool.

Data on production refers to 2019 production and is from the FAO FishStatJ database. Status in terms of certifications and fishery, and FIPs and AIPs refers to September 2021.



Frozen Alaskan pollock © Marco Verch Flickr



Cod fillets © Jonn Leffmann Wikimedia Commons

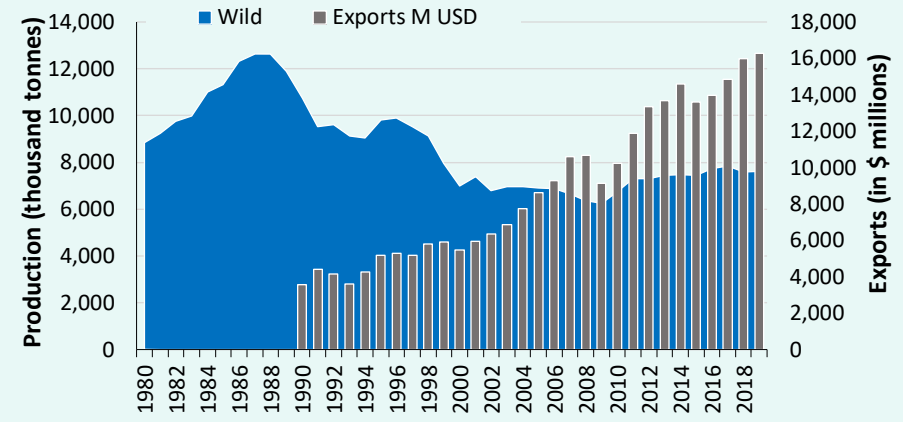
### 3 PRODUCTION

Wild classic whitefish is one of the largest seafood sectors, with average global production of about 7.6 million tonnes per year in the last five years (FAO 2021a). After a peak in production in the 1980s, with more than 12 million tonnes, production decreased and has been relatively stable since 2000 (**Figure 1**).

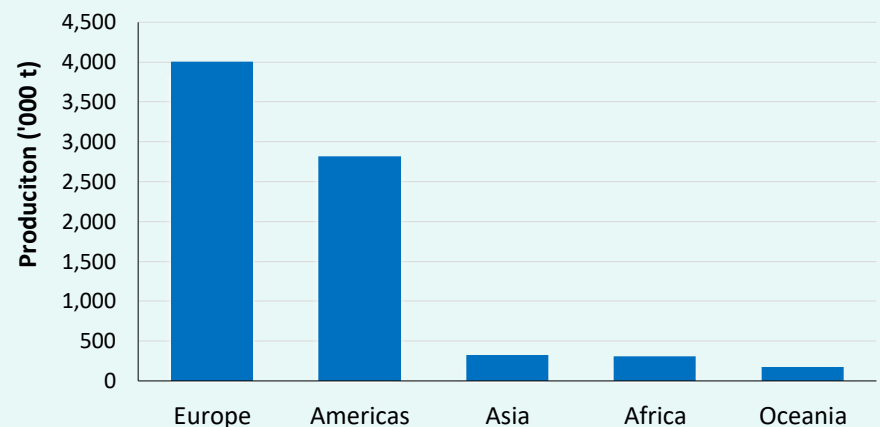
The five top producing countries account for 77 percent of total wild classic whitefish production, with Europe (Russia, Norway, and Iceland) representing the highest volume of production (**Figure 2**). Russia continues to be the largest producing country (31 percent of the total catch), with approximately 2.4 million tonnes produced in 2019. The United States is the second most important producing country (27 percent) (**Figure 3**) (FAO 2021a).

In terms of species, wild classic whitefish production is dominated by two species: Alaska pollock (*Gadus chalcogrammus*, 46 percent) from the NE and NW Pacific, and Atlantic cod (*Gadus morhua*, 15 percent), mostly from the NE Atlantic. Although they represent a smaller volume, other important species are also targeted by this sector, including Argentine hake (*Merluccius hubbsi*), Pacific cod (*Gadus macrocephalus*), and North Pacific hake (*Merluccius productus*) (**Appendix I**).

**Figure 1 | Wild classic whitefish production (area) and exports (bars) between 1980 and 2019**

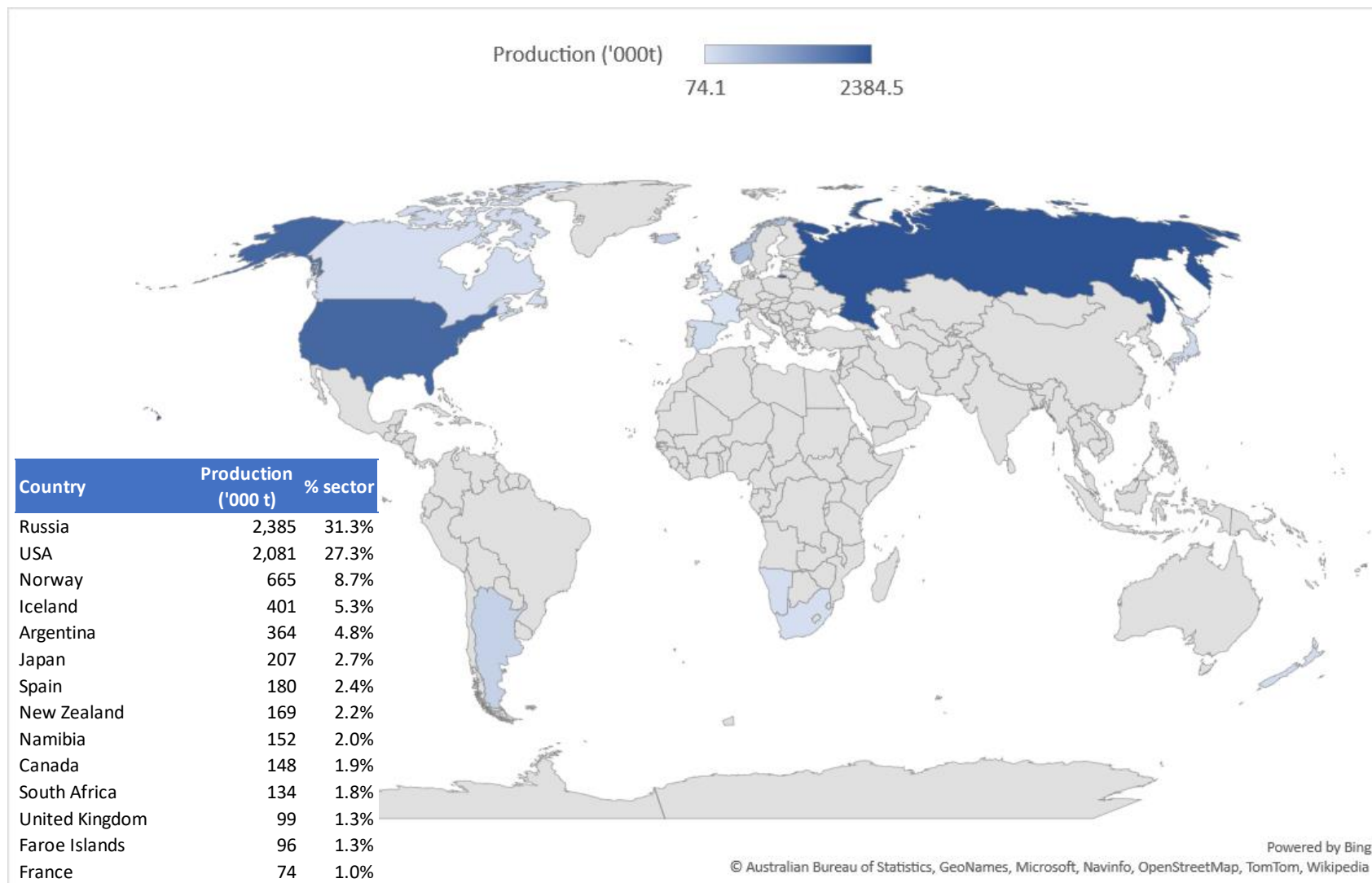


**Figure 2 | 2019 wild classic whitefish production by continent**





**Figure 3 |** The top producing countries for wild classic whitefish (94 percent of production)



Source: FAO FishStatJ

## 4 TRADE STATISTICS

Wild classic whitefish remains one of the most economically important seafood commodities globally. Worldwide, wild classic whitefish trade (exports) totaled more than USD 16 billion by value in 2019, the highest value reported since 1990. In the past decade, annual wild classic whitefish trade grew nearly 60 percent, from USD 10 billion in 2010 to USD 16 billion in 2019 (**Figure 1**) (FAO 2021b).

The main exporting countries for this sector are widely distributed: Russia, China, Norway, and the United States account for almost 50 percent of the reported wild classic whitefish exports by value. The Netherlands and Iceland (each representing about 7 percent of exports) are also important source markets for this commodity (**Table 1**).

China had the highest increase (12.7 percent) in market share in wild classic whitefish exports since 2010, while Norway had the most significant decrease (-5.3 percent) in market share in the same period (FAO 2021b).

Russia's trade partners are not identified ("Other nei"), but according to import data, the main countries that report imports from Russia include China (47 percent), South Korea (14 percent), and the Netherlands (8 percent), representing nearly 70 percent of total imports from Russia by value (**Appendix II**). For all the other main exporters, Europe (mainly the Netherlands, the United Kingdom, France, Spain, and

Germany, **Appendix III**) is the largest market for wild classic whitefish, representing 59 percent of total imports by value, about USD 9.9 billion in 2019. China and the United States are also important end markets for this sector, accounting for 12 percent and 7 percent of total imports by value, respectively (**Table 1**; FAO 2021c).

**Table 1** | Main wild classic whitefish exporters in 2019 and their top trade partners, by percentage of each country's total exports

Importer Exporter	EU / EEA / UK	China	USA	Japan	South Korea	Brazil	Canada	Other	Total 2019 exports (USD billion)	% of total exports
Russia	0%	0%	0%	0%	0%	0%	0%	100%	2.3	14%
China	57%	0%	21%	4%	4%	3%	6%	6%	2.2	14%
Norway	67%	12%	3%	0%	0%	7%	1%	11%	1.7	11%
USA	36%	10%	0%	21%	19%	0%	3%	10%	1.6	10%
Netherlands	86%	13%	0%	0%	0%	0%	0%	1%	1.2	7%
Iceland	81%	0%	13%	0%	0%	0%	3%	2%	1.2	7%
Denmark	94%	4%	0%	0%	0%	0%	0%	1%	0.8	5%
Germany	95%	0%	0%	0%	0%	0%	0%	5%	0.7	4%
Sweden	100%	0%	0%	0%	0%	0%	0%	0%	0.5	3%
% of total imports	59%	12%	7%	6%	3%	2%	2%	9%		

Source: FAO 2021c

**Notes:** (1) EU\_EEA\_UK, European Union, [EEA](#) countries, and the United Kingdom. (2) Under most rules for country of origin labeling, seafood will often be listed as a product of the country it is processed in, not where it was originally caught. (3) Russia reports all partners as "Other nei."

China also had the largest growth in terms of imports by value, with a 7.5 percent increase in market share between 2010 and 2019, followed by the Netherlands (2.1 percent increase). In contrast, Japan and Germany lost market share loss in the last decade, with 2.5 percent and 2.2 percent decreases, respectively (FAO 2021b).

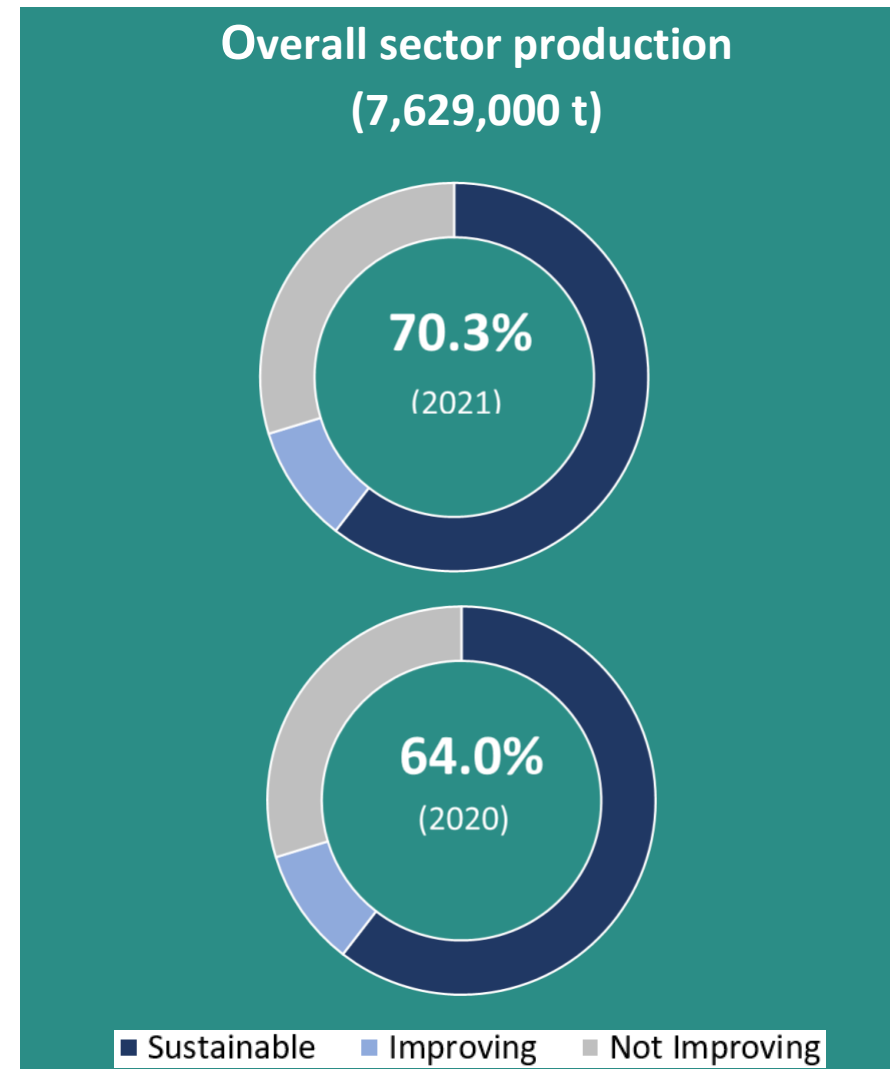


## 5 PROGRESS AGAINST THE 75% TARGET

Currently, about 70 percent (more than 5.3 million tonnes) of global wild classic whitefish production, is considered **sustainable or improving**. Sustainable production (i.e., from MSC-certified fisheries) represents almost two-thirds of the sector (about 60 percent of total production), while improving production is about 10 percent of total production. While the sector is close to the 75-percent target, there is no evidence of improvements within the remaining 30 percent of production. In addition, it must be noted that Russian fisheries, which make up 31 percent of the sustainable or improving volume, may be at risk of losing certification if certification bodies are unable to continue the required auditing.

Compared to the same period in 2020, the wild classic whitefish sector showed an increase in production that is sustainable or improving, from 64 percent to 70 percent. This was mainly driven by Russian fisheries that entered into new full assessments for MSC certifications (e.g., [Fishery Shipowners Association \(FSA\) East Kamchatka and North Kuril Islands Walleye pollock](#)) and a Russian [Alaska pollock FIP](#) that is making good progress.

Learn more about SFP's Target 75 strategy in 2022 and prioritized fisheries [here](#).



## 6 CHALLENGES TO SUSTAINABILITY

Despite the sustainability progress, issues still persist across the whitefish sector, with some causing fisheries to lose their MSC certifications or failing to close out conditions (e.g., Baltic cod):

- **Climate change impacts** are already disrupting major whitefish stocks (e.g., Canadian and US cod).
- **Endangered, threatened, and protected (ETP) species and habitat impacts** remain in key whitefish fisheries (e.g., redfish bycatch in the Barents Sea cod fishery).
- **Data transparency** is still lacking, even in some fisheries that have fairly strong fishery management approaches (e.g., Russian pollock).
- Several wild whitefish fisheries still have serious **stock health and management issues**, and lack evidence that this is being addressed (e.g., Baltic cod).

All of these concerns risk supply disruptions to the companies that depend on whitefish, and have already led to loss or suspension of MSC certificates (e.g., Baltic and North Sea cod). Additionally, major customers (retailers and foodservice companies) continue to elevate their responsible sourcing requirements to address emerging environmental and social concerns.



*Redfish are a slow-growing, long-lived deepwater fish species, which mature at a late age. These traits make redfish highly vulnerable to overexploitation and, ultimately, unsustainable fishing. Redfish bycatch has been a concern in some fisheries such as the Barents sea cod and haddock fishery.*



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## 8 GLOSSARY

ASMI	Alaska Seafood Marketing Institute	T75	SFP Target 75 initiative
EEZ	Exclusive Economic Zone	UoC	Unit of Certification (for a fishery under the MSC program)
ETP	Endangered, Threatened, Protected species		
MSC C	Marine Stewardship Council Certified		
MSC FA	Marine Stewardship Council Full Assessment		
FAO	Food and Agriculture Organization		
FIP	Fishery Improvement Project		
ISSCAAP	International Standard Statistical Classification of Aquatic Animals and Plants		
IRF	Iceland Responsible Fisheries		
MBAq	Monterey Bay Aquarium		
MSC	Marine Stewardship Council		
NEI	Not Elsewhere Included		
NGO	Nongovernmental Organization		
SFW	Seafood Watch		
SR	Supply Chain Roundtable		

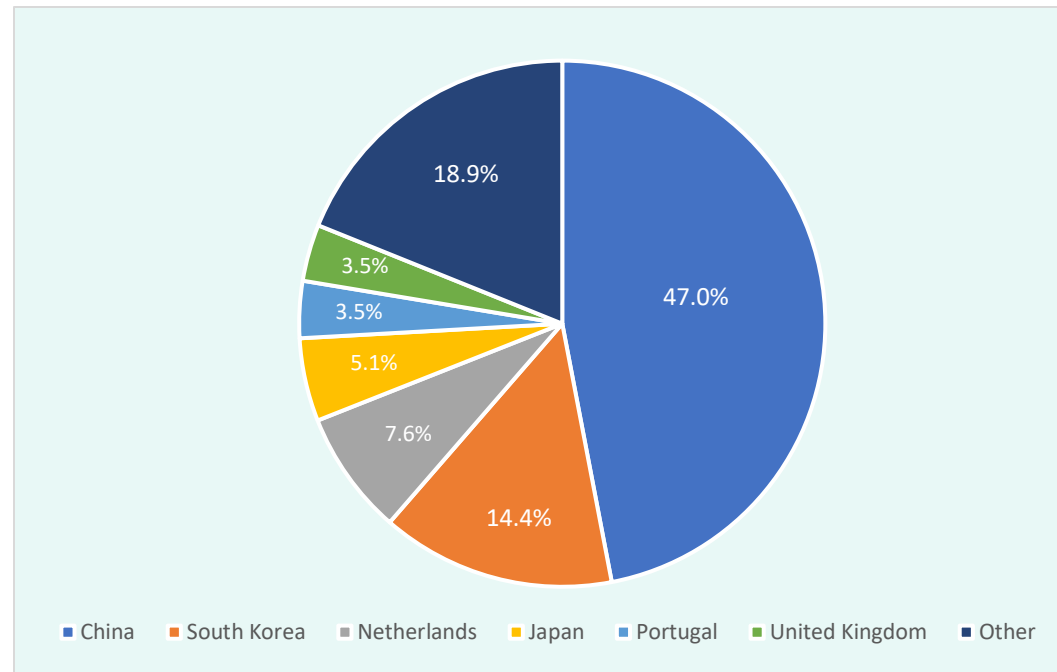


# Appendix I | Reported production of top wild classic whitefish species, 2019

Common name	Scientific name	2019 production ('000 t)	% of total
Alaska pollock	<i>Gadus chalcogrammus</i>	3496.4	45.8
Atlantic cod	<i>Gadus morhua</i>	1130.6	14.8
Argentine hake	<i>Merluccius hubbsi</i>	449.0	5.9
Pacific cod	<i>Gadus macrocephalus</i>	432.6	5.7
North Pacific hake	<i>Merluccius productus</i>	419.0	5.5
Saithe	<i>Pollachius virens</i>	348.7	4.6
Haddock	<i>Melanogrammus aeglefinus</i>	315.5	4.1
Cape hakes	<i>Merluccius capensis</i> , <i>M.paradoxus</i>	286.3	3.8
Blue grenadier	<i>Macruronus novaezelandiae</i>	124.9	1.6
European hake	<i>Merluccius merluccius</i>	116.9	1.5
South Pacific hake	<i>Merluccius gayi</i>	87.5	1.1
Patagonian grenadier	<i>Macruronus magellanicus</i>	58.6	0.8
Other		363.1	4.8

Source: FAO FishStat (FAO 2021a)

**Appendix II |** Main trade partners for Russia, according to import data



**Source:** FAO 2021c

**Appendix III |** Main wild classic whitefish exporters in 2019 and their top trade partners, by percentage of each country's total exports, with unaggregated data for European countries

<div> <div>Importer</div> <div>Exporter</div> </div>	China	USA	Netherlands	United Kingdom	France	Spain	Germany	Portugal	Other	Total 2019 exports (USD billion)	% of total exports
Russia	0%	0%	0%	0%	0%	0%	0%	0%	100%	2.3	14%
China	0%	21%	2%	13%	6%	2%	23%	2%	33%	2.2	14%
Norway	12%	3%	2%	9%	3%	2%	1%	20%	69%	1.7	11%
USA	10%	0%	17%	0%	4%	3%	7%	1%	59%	1.6	10%
Netherlands	13%	0%	0%	8%	19%	19%	8%	14%	33%	1.2	7%
Iceland	0%	13%	6%	20%	19%	14%	5%	6%	22%	1.2	7%
Denmark	4%	0%	12%	5%	27%	10%	10%	3%	31%	0.8	5%
Germany	0%	0%	7%	11%	21%	5%	0%	5%	56%	0.7	4%
Sweden	0%	0%	2%	2%	8%	8%	1%	45%	79%	0.5	3%
% of total imports	12%	7%	7%	7%	7%	7%	7%	5%	41%		

Russia reports all partners as "Other nei".

Source: FAO 2021c





Industrial trawlers in Cangas; Galicia © Patrícia Amorim

## FURTHER INFORMATION

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

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