



# The Business of Sustainable Seafood

*Sustainability is  
everyone's business*



**Sustainable Fisheries™**  
PARTNERSHIP



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# MESSAGE FROM OUR CHAIR

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**This is my last message to you as Chair of the SFP Board, as my tenure finishes at the end of 2023.**

My four years as Chair have been both rewarding and challenging. My term was unusual and unique, as it overlapped with the COVID pandemic. I found myself much more involved in the daily life of the organization than I would have been as Chair during a “normal” term.



Although SFP handled the disruption well, because we were already used to working remotely, we were faced with the challenge of quickly adapting our short-term strategy. In my weekly meetings with our CEO and COO, I appreciated the opportunity to be more hands-on than usual.

During these years, we worked very hard to diversify the Board, and today we have a broad range of directors from industry, NGOs, and international organizations. We have also improved our gender and geographical balance. Yet, while we all come from different places and have different points of view, we are all working together toward our shared goal of 100-percent sustainable seafood.

Achieving this goal requires collaboration with a diverse group of actors, from seafood buyers, suppliers, and processors, to small-scale and artisanal fishers, to governments, international organizations, universities, and other NGOs.

Coming from an industry background, I appreciate SFP's view that the seafood

industry should be seen as an ally, and that we can't improve global practices if seafood companies are not very much involved in the process.

Lots of companies say they are working on sustainability, though some companies are doing more than others. My perspective is that we should recognize those that are doing a lot, rather than shaming those who don't do much. And, importantly, we need to demonstrate to all companies – not just the industry leaders – that sustainability provides an important commercial advantage and is worth investing in.

That is what we are talking about in this report – how the business of sustainability is everyone's business.

It is clear to me, based on my experiences at Davigel and SFP, that this is true, and that positive action on sustainability can indeed be a commercial advantage for a committed company. Davigel was awarded multiple contracts to supply seafood to institutions such as schools because of our achievements in sustainability, even when we were not the lowest bidder.

Through a corporate indexing system that showed our global level of sustainability and our progress year to year, Davigel was able to definitively show that we were committed to sustainability and had improved over the years, resulting in our winning those contracts that we might otherwise have lost out on.

Although I am stepping down as Chair later this year, this is not the end of my time with SFP. I still have one more year on my Board term, and I look forward to helping my successor transition into the role of Chair and continuing to work with the Board and SFP leadership on SFP's next five-year strategy. The plans we set in the next year will shape the future of SFP through 2030. We have a lot of work to do, but I believe that our goal of 100-percent sustainable seafood is achievable if we all work together to ensure that everyone is in the business of sustainability.

**Jean-Louis Meuric  
Dieppe, France**



# MESSAGE FROM OUR CEO

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**At SFP, we want to see 100% of the world's seafood be sustainable, as fast as possible.**

When I started SFP in 2007, some groups were already recognizing the best fisheries, and recommending that folks buy from them, while other groups were working with good fisheries to make them even better. Both of these approaches relied on the expectation that other fisheries would choose to follow their examples.

But problem fisheries were stuck. Many couldn't follow suit or respond to market demands for sustainability even if they wanted to, because of a range of tough problems, from opposing vested interests and lack of organization among fishers, to poor overall governance and inadequate funding and capacity among fisheries regulators.

A new approach was urgently needed to actively help problem fisheries transition to sustainability. So, we chose to roll up our sleeves and help in two ways: First, we directly help specific fisheries fix specific critical problems. Second, we develop approaches that are replicable and have the potential to rapidly reach many more fisheries.

The backbone of our approach is working with seafood supply chains, from retailers and restaurant chains to individual fishers and farmers around the world. Leadership by retailers, suppliers, and producers is critical to fixing stubborn problems in fisheries. Because seafood is one of the most traded commodities on the planet, seafood supply chains reach even the most remote fisheries, meaning that successes can be rapidly replicated by organizing and informing supply chains.

While we are constantly refining our strategy and approaches to achieve our ambition, we are always focused on engaging as many supply chains as we can and producing steady incremental continuous improvement in as many problem fisheries as possible.

You can read all about our latest strategies and progress in achieving these goals in the pages of this annual report. Importantly, these achievements would not be possible without the SFP team. Our talented staff, spread all around the world, bring a diversity of skills and backgrounds to get the job done.

Our scientists systematically assess global fisheries and identify the issues that need to be fixed. Our technical, policy, and management experts work with local stakeholders to identify the most promising ways to address those problems, and then help local leaders organize and implement improvement activities.

Our supply chain team convenes the main suppliers buying from each fishery and works to align them to better support local improvement efforts. Our markets team works with major buyers to maximize their impact and ensure their suppliers are actively participating in and contributing to improvement efforts.

And our business services staff ensure our evaluations, improvement advice, and information on supplier actions are synthesized and communicated efficiently to the executives overseeing responsible procurement, sustainability programs, due diligence and compliance, brand development, and consumer marketing.

Finally, our communications and special initiatives teams address particularly challenging issues and advance our work by raising awareness and creating urgency for action, securing commitments, and increasing critical capacity.

The talent and diversity of our staff is complemented by that of our Board. In his message on the previous pages, SFP's Board Chair Jean-Louis Meuric describes the work he leads and the efforts taken to ensure our Board has the diversity it needs to effectively oversee and steer SFP. We have benefited greatly from Jean-Louis' leadership on the Board; he has been a great partner in refining SFP and increasing our impact.

I thank the SFP team, our Board Chair, and all of SFP's volunteer Board members, for their hard work, critical thinking, and good humor. Merci beaucoup pour tout, Jean-Louis and team!

**Jim Cannon**  
**Honolulu, Hawaii**



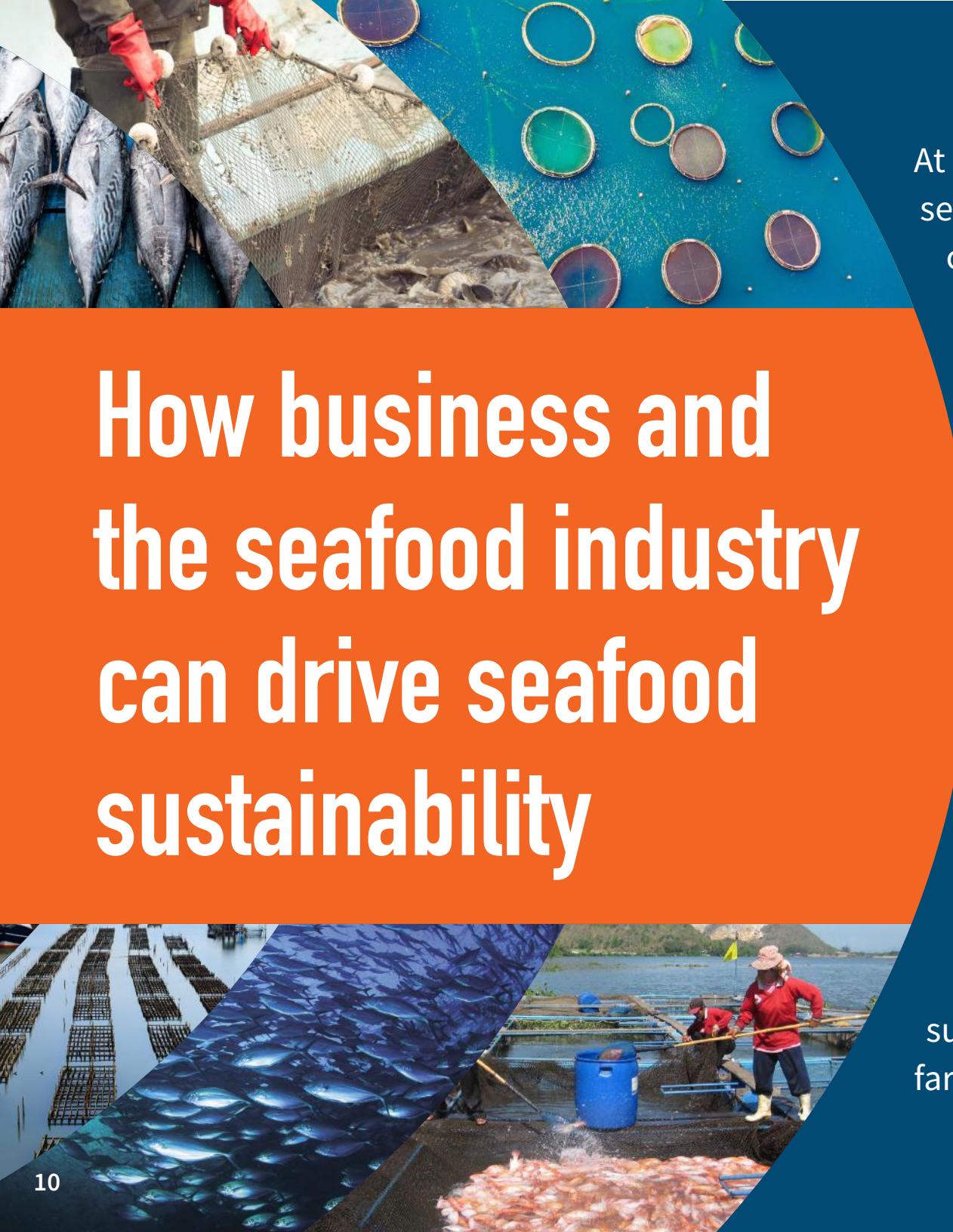


# Sustainable Fisheries Partnership (SFP)

is working toward a world where the oceans are healthy and abundant, with sustainable and secure seafood supplies and a thriving and responsible seafood economy.

We engage retailers, brands, and foodservice companies to lead and drive actions through their seafood supply chains to:

- Rebuild depleted fish stocks
- Reduce the environmental impacts of fishing and fish farming
- Protect ocean biodiversity
- Address social issues in fishing
- Advance economic opportunities for fishers and their communities worldwide.



# How business and the seafood industry can drive seafood sustainability

At SFP, we believe that the private sector is an important ally in marine conservation. Seafood production should address a broad vision of sustainability. This starts with healthy fishery resources, but then includes protecting and restoring marine ecosystems, building resilient and robust fishing and coastal communities, and ensuring effective governance and management.

SFP works with major retailers, brands, and seafood companies toward responsible seafood production throughout the entire supply chain for wild-caught and farmed products.

## Priorities for Fisheries Improvement

- Ensuring sustainable catch levels and stock management
- Reducing bycatch of endangered, threatened, and protected species
- Promoting effective co-management in small-scale fisheries
- Reducing illegal, unreported, and unregulated (IUU) fishing.

We seek to create healthy and robust fisheries and fishing communities to withstand the changes and effects of climate change.

In aquaculture, we are leading science, policy, and governance initiatives to advance and establish landscape-based management and improvement efforts to protect and regenerate habitat, improve quality and safety for farms and farmed products, and address climate change.

## What is a Fishery Improvement Project (FIP)?

Fishery improvement projects (FIPs) bring together retailers, processors, producers, and fishers to demand and leverage better management of marine resources, by identifying environmental issues and implementing priority actions to address the root causes of fishery depletion. Today more than half of the world's FIPs are industry-led.

## What is an Aquaculture Improvement Project (AIP)?

Aquaculture improvement projects (AIPs) bring stakeholders together to address environmental challenges, using the seafood industry to incentivize improvements and make these improvements endure through policy change.



# PARTNERSHIPS

SFP's partnerships are vital to our ongoing mission of building a more sustainable global seafood industry. Our partners include many of the world's biggest retailers, restaurants, and brands.

SFP's partners actively drive change in fisheries and aquaculture by using their leverage to mobilize improvements within their supply chains. Our partners require their supply chains – from suppliers down to fishers and fish farmers – to both initiate and participate in fishery and aquaculture improvement efforts. They also ask their suppliers to join Supply Chain Roundtables (SRs) and other pre-competitive efforts to amplify change across sectors, countries, and regions, and to be leaders in improving fisheries globally.



“

“Through our long partnership with SFP, we have been able to meet our seafood sustainability commitments and positively influence whitefish fisheries around the world.”

*– McDonald’s Corporation*

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”

“Fish is a key ingredient in many of our pet food products, and pet owners are increasingly interested in knowing where their pets’ food is sourced.

We work with SFP to ensure our seafood is sustainable, responsibly sourced, and continually improving, to allow us and our customers to make more informed decisions for their pets and the planet.”

*– Nestlé Purina*



# PARTNER WITH SFP

Does your company have an interest in improving sustainable seafood sourcing?

Do you know of a fishery or aquaculture operation that might benefit from an improvement project?

Our partnerships with industry leaders are vital to our ongoing mission of building a more sustainable global seafood industry. SFP partners share our interest in long-term seafood sustainability, are committed to the continuous improvement of fisheries and fish farms, and encourage supplier participation in our Supply Chain Roundtables.

SFP partner companies have access to resources to support their commitments, including SFP's Seafood Metrics system to assess supply chain risks and track sustainability progress, as well as partner-only briefings, webinars, forums, and key opportunities to network with industry through leaders.

Contact us at [info@sustainablefish.org](mailto:info@sustainablefish.org).  
We look forward to hearing from you.

# SFP PARTNERS

Aldi Nord  
Aldi South  
Asda  
Auchan Retail Spain  
Beacon Fisheries  
Beaver Street Fisheries  
Comptoirs Oceanique  
Congalsa  
Cooperative Food UK  
Disney Parks, Experiences, and Products  
Fortune International  
Frinsa  
Giant Eagle  
Grupo Profand  
High Liner  
McDonald's  
Meijer  
Migros

Morrison's  
Nestlé Purina  
Nueva Pescanova  
Publix  
Sainsbury's  
Sam's Club  
Seattle Fish Company  
Super Indo  
Sysco France  
Tesco  
Thai Union Group  
Union Martin  
US Foods  
Walmart Canada  
Walmart Chile  
Walmart Mexico & Central America  
Walmart US



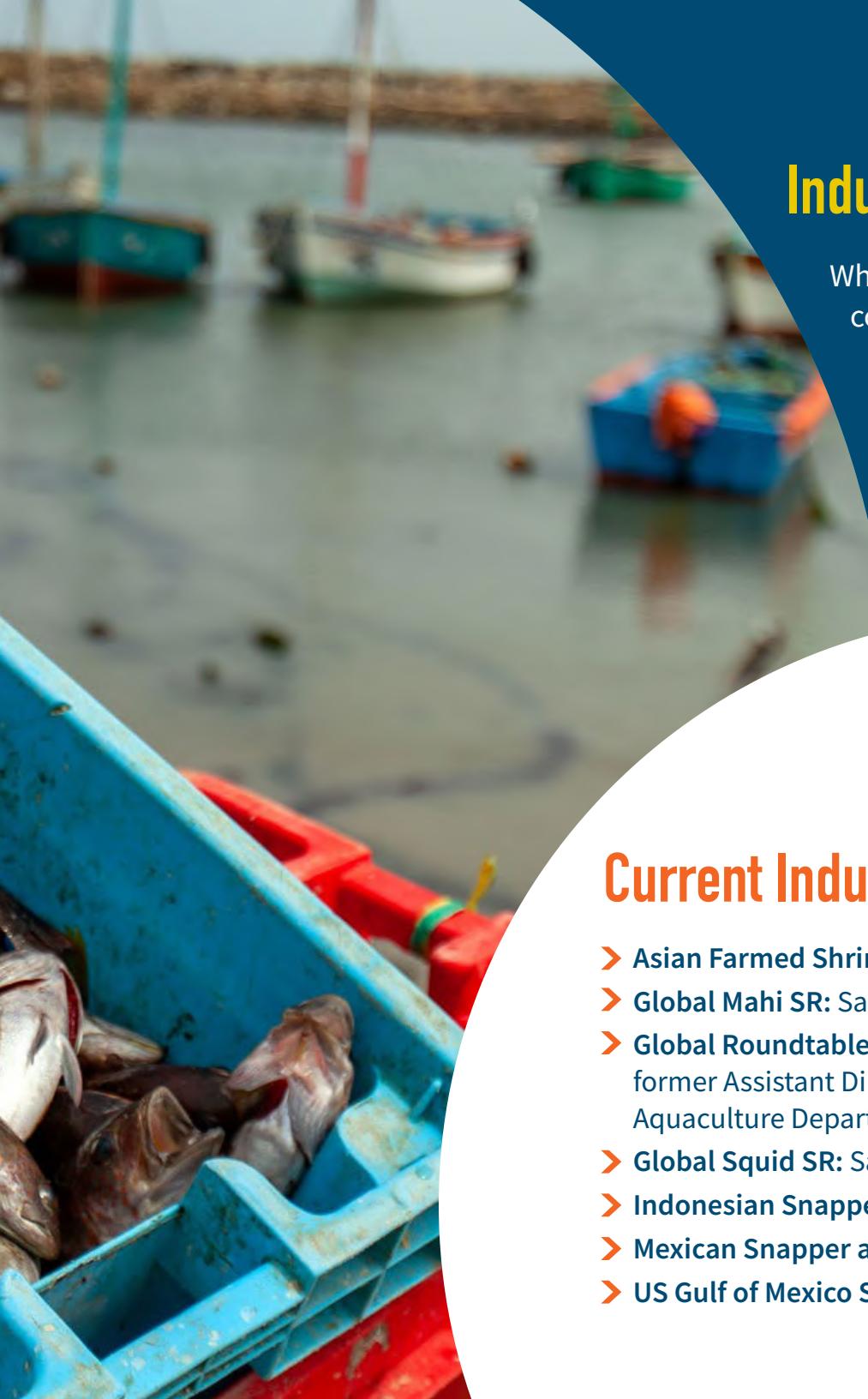
# SUPPLY CHAIN ROUNDTABLES

Our Supply Chain Roundtables (SRs) bring together major buyers and importers of seafood in a particular sector. SR participants work together pre-competitively to scale-up individual fishery or aquaculture improvement efforts and jointly advocate for better fisheries policy and management with governments, regulators, and resource managers.

SRs educate, inform, and mobilize companies to drive changes and improvements across an entire sector. Participating companies work together to initiate and monitor multiple FIPs, maximizing efficiency and avoiding duplication of effort.

SFP works with SR participants to identify common needs in different fisheries within a single sector, set priorities for action, gather and disseminate information, and recruit new participants. Each SR has its own focus and goals, depending on the unique needs of that sector.





## Industry leadership of SRs

While SFP created the SR model and continues to actively coordinate their activities, we have been working with participants to increase industry leadership and funding of the roundtables. Each SR elects an industry chair, who works closely with the SFP lead to set priorities, drive progress, recruit participants, and raise funds.

### Current Industry Chairs

- **Asian Farmed Shrimp SR:** Blake Stok, Thai Union
- **Global Mahi SR:** Santiago Alvarez, Alfa Gamma Group
- **Global Roundtable on Marine Ingredients:** Árni Mathiesen, former Assistant Director-General and Head of the Fisheries and Aquaculture Department, UN Food & Agriculture Organization
- **Global Squid SR:** Sarah Hussey, Seafresh Group; Stefano Pagliai, Panapesca
- **Indonesian Snapper and Grouper SR:** Casey Marion, Beaver Street Fisheries
- **Mexican Snapper and Grouper SR:** Tim Lycke, Incredible Fish
- **US Gulf of Mexico Shrimp SR:** Reese Antley, Wood's Fisheries

# Join a Supply Chain Roundtable

Participating in an SFP Supply Chain Roundtable (SR) can help your company or your suppliers increase their impact through the collective leverage of multiple companies seeking to advance sustainability in a specific seafood sector.

Contact us at [info@sustainablefish.org](mailto:info@sustainablefish.org) for more information on joining an SR.

## Benefits of SR Participation



# U.S. Gulf of Mexico shrimp fishery enters certification process

Industry participation and leadership was pivotal in a multi-year, multi-stakeholder process to improve the sustainability of the U.S. Gulf of Mexico shrimp fishery.

In May 2023, the American Shrimp Processors Association announced that it entered the fishery into sustainability assessments under the Marine Stewardship Council (MSC) and Certified Seafood Collaborative (CSC) Responsible Fisheries Management (RFM) certification programs, two of the world's leading wild fishery sustainability standards.

Entry into these certifications represents important progress in efforts to resolve challenges in the fishery – including high rates of bycatch and interaction with seafloor habitat – that began 15 years ago with FIPs initiated by SFP. Subsequent FIP launches, coordination, and shrimp fishery research were supported by the Audubon Nature Institute and Texas Sea Grant. Throughout the process, the shrimp industry, management agencies, and NGOs worked closely together to help the fishery reach this milestone.

Beginning in 2014, SFP initiated transition of the individual state-specific FIPs to industry leadership, to enable focus on local issues. SFP now facilitates the U.S. Gulf of Mexico Shrimp Supply Chain Roundtable, which brings together leading shrimp processors and distributors in a pre-competitive environment to address overarching issues across the Gulf of Mexico. Since 2021, SFP's work on Gulf shrimp has been funded by the SR participants.



# SEAFOOD SHOWS



In 2022 and early 2023, we significantly increased our participation in the **Seafood Expos in North America and Europe**, and made our first appearance at the **Expo in Asia**. We had bigger booths and a larger presence at the shows, led conference panels, hosted events and Supply Chain Roundtable meetings, opened our space to colleagues and collaborators to present, and provided a nexus for sustainability at the events.



# Seafood Expo ASIA



Sustainability was high on the agenda in Singapore. The SFP team met with buyers and suppliers from the Asia region and NGOs that are working on similar issues, such as IUU fishing.



September 14-16, 2022, Singapore

These connections are key for expanding our efforts into Asia, which, as both an end market and producing region, is vital for achieving sustainable seafood. SFP's work in North America, Europe, and other markets has led to important sustainability progress. But reaching the fisheries where those markets have less leverage requires working with the Asian buying market.

SFP Global Policy Director Brad Spear at an SFP-hosted workshop on seafood sustainability that included speakers from Thai Union, Seafood Legacy, SeaTrace International, Meloy Fund, Global Seafood Alliance, and MarinTrust.



# Seafood Expo NORTH AMERICA



SFP's centrally located booth was a key destination for sustainability at the Expo.



SFP, Thai Union, and Key Traceability host a panel on how the seafood industry can help endangered species, highlighting Thai Union's new commitment to only source from vessels that implement best practices to protect ocean wildlife.

(L-R) SFP Biodiversity and Nature Director Kathryn Novak, Key Traceability Director Iain Pollard, Thai Union Group Director for Sustainability Adam Brennan, and SFP Chief Executive Officer Jim Cannon.

At our Bycatch Solutions Showcase, retailers and suppliers connect with gear manufacturers, fishers, and representatives from U.S. and Canadian gear-lending libraries to learn about ropeless, or on-demand, gear that can reduce whale entanglements while still allowing fishing to continue.

March 12–14, 2023, Boston, Massachusetts, USA



SFP and seafood industry leaders announce pilot projects companies are championing through an SFP-led project to test the use of universal fishery IDs, supported by the United Nations Development Programme Ocean Innovation Challenge.

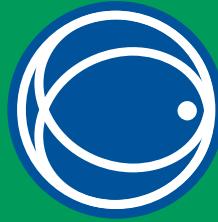
(L-R) Jason Berryhill of Wholechain; Guy Pizzuti, business development director for seafood, Publix Super Markets; Brad Spear, global policy director, SFP; Jim Cannon, chief executive officer, SFP; Bill DiMento, vice president of corporate sustainability, High Liner Foods; and Blake Stok, director of sustainability, Thai Union North America.



Pacific Coral and Fortune Fish & Gourmet featuring Proud to Work with SFP signs.



Representatives of the fisher-led Ecuador mahi-mahi (ASOAMAN) fishery improvement project (FIP), before presenting to the Global Mahi Supply Chain Roundtable.



# Seafood Expo GLOBAL



SFP's stand at the Expo was a hub for meetings, events, and conversations about sustainability.



Thai Union is the first company to sign SFP's Protecting Ocean Wildlife Pledge, committing to reduce marine wildlife bycatch in commercial fisheries through adoption of best practices and continuous supply chain improvements.

*SFP Biodiversity and Nature Director Kathryn Novak and Thai Union Group Director, Sustainability, Adam Brennan.*

SFP's Kathryn Novak is joined by Tracy Murai of Thai Union and Nicola Bedding of Purina Europe for the official launch of our Bycatch Solutions Hub.

April 25-27, 2023, Barcelona, Spain



SFP and the Aquaculture Stewardship Council (ASC) sign an MoU to collaborate on sustainable aquaculture production and practices around the world.

*Chief Executive Officers Jim Cannon (SFP, left) and Chris Ninnis (ASC, right).*

SFP CEO Jim Cannon moderates a panel on how seafood sourcing data is integral to sustainability and can drive consumer interest for retailers and seafood companies.

*(L-R) Cannon, SFP Advisory Services Sales Director Mercedes Mendoza, Nicole Fischer of Micarna SA, and Wenche Grønbekk of SeaBOS.*



Mauritanian octopus fishery stakeholders sign an MoU to establish a fishery improvement project (FIP). SFP's Global Octopus Supply Chain Roundtable, led by Carmen González-Vallés (in yellow), has been supporting the FIP development.



SFP Program Director Dave Martin (second from left) on a panel about marine ingredients and multispecies fisheries.

Congalsa featuring Proud to Work with SFP sign.

# SFP's science and tools power sustainable seafood around the world



Today, you can walk into many grocery stores and find sustainable seafood for sale at the fish counter. Many retailers have their own ratings systems to demonstrate the sustainability of their products.

But where does that seafood come from? How does the retailer know it is purchasing sustainable products? And how can consumers be sure it's really sustainable?

**SFP's science and tools provide the foundation for the seafood industry to understand, identify, source, and market sustainable seafood to consumers around the world.**



**FishSource**, our public, online resource, offers timely, impartial, and actionable information on thousands of fisheries and dozens of aquaculture regions, and the improvements they need to become sustainable.



Our **Seafood Metrics** system uses data from FishSource to provide companies with a customized analysis of their seafood portfolios, allowing them to more fully understand the level of sustainability in their wild-caught and farmed seafood source fisheries.



**Ocean Disclosure Project**

Our **Ocean Disclosure Project** (ODP) enables companies to be publicly transparent and back up their sustainability claims by disclosing the sourcing and sustainability status of their seafood products.

**Before we developed these tools, there was little easily accessible information for the seafood industry to understand the sustainability of their supply.**

SFP's resources help industry and other stakeholders identify which fisheries and aquaculture regions are doing well in terms of sustainability, which are in trouble, and which are the most significant, both in terms of markets and conservation. This, in turn, can help determine where to focus improvement efforts and what approaches to use.

Our system of continuous evaluation and assessment allows companies to adapt their strategies and evolve based on up-to-date and relevant information and results, and to confidently communicate progress on their commitments to consumers and others interested in sustainability. SFP's systems provide the support and data for many of the sustainable seafood programs offered by major retailers.

Our current work on universal fishery IDs (see page 36) is adding additional detail to this world of information and an extra level of certainty in identifying source fisheries, through a standardized system of fisheries identification for use by all stakeholders.



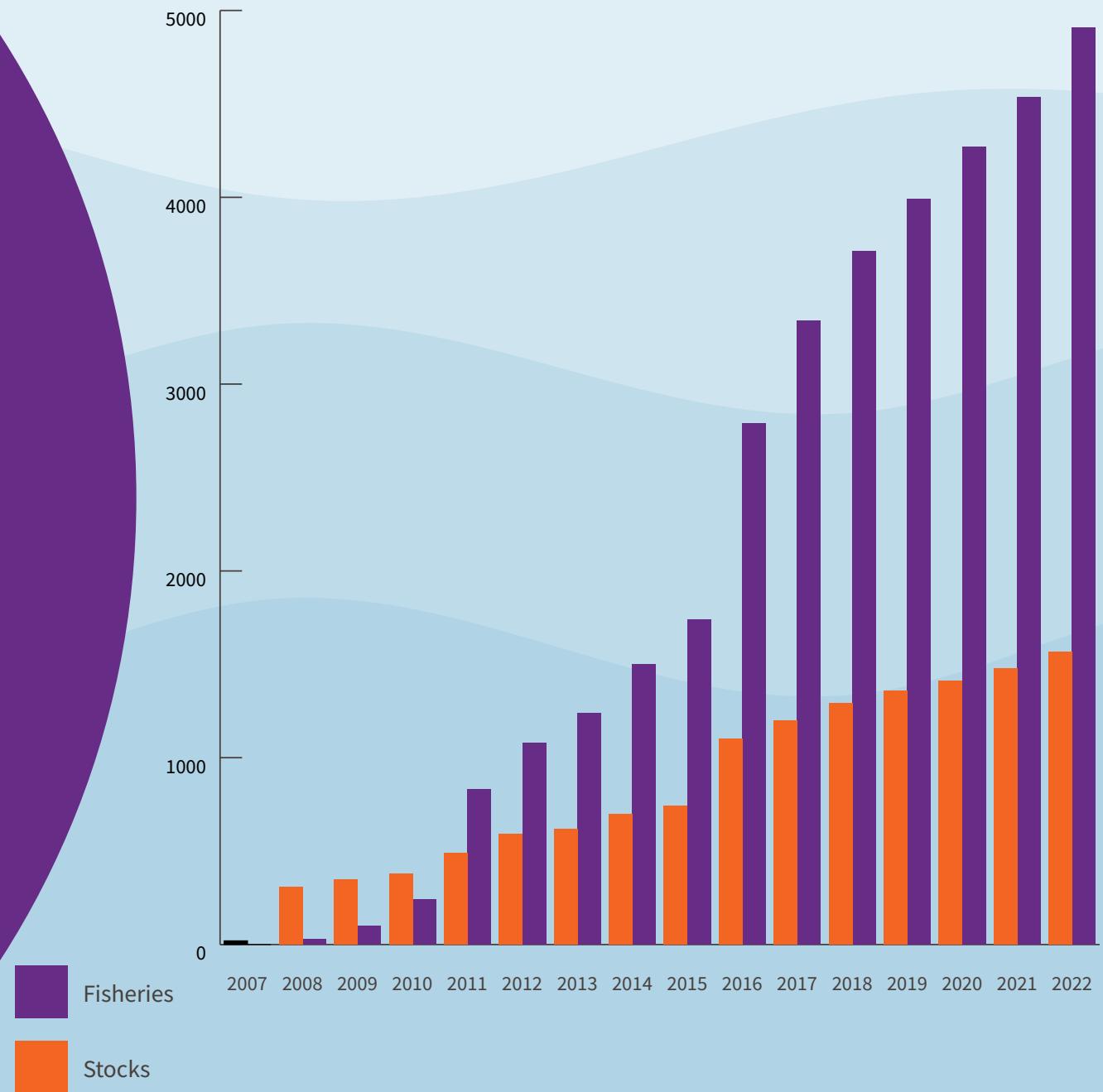
# HAPPY BIRTHDAY, FISHSOURCE

In 2022, FishSource celebrated **15 years** of helping users identify the most urgent issues in their source fisheries, evaluate the sustainability of their supply, and understand where improvements are needed.

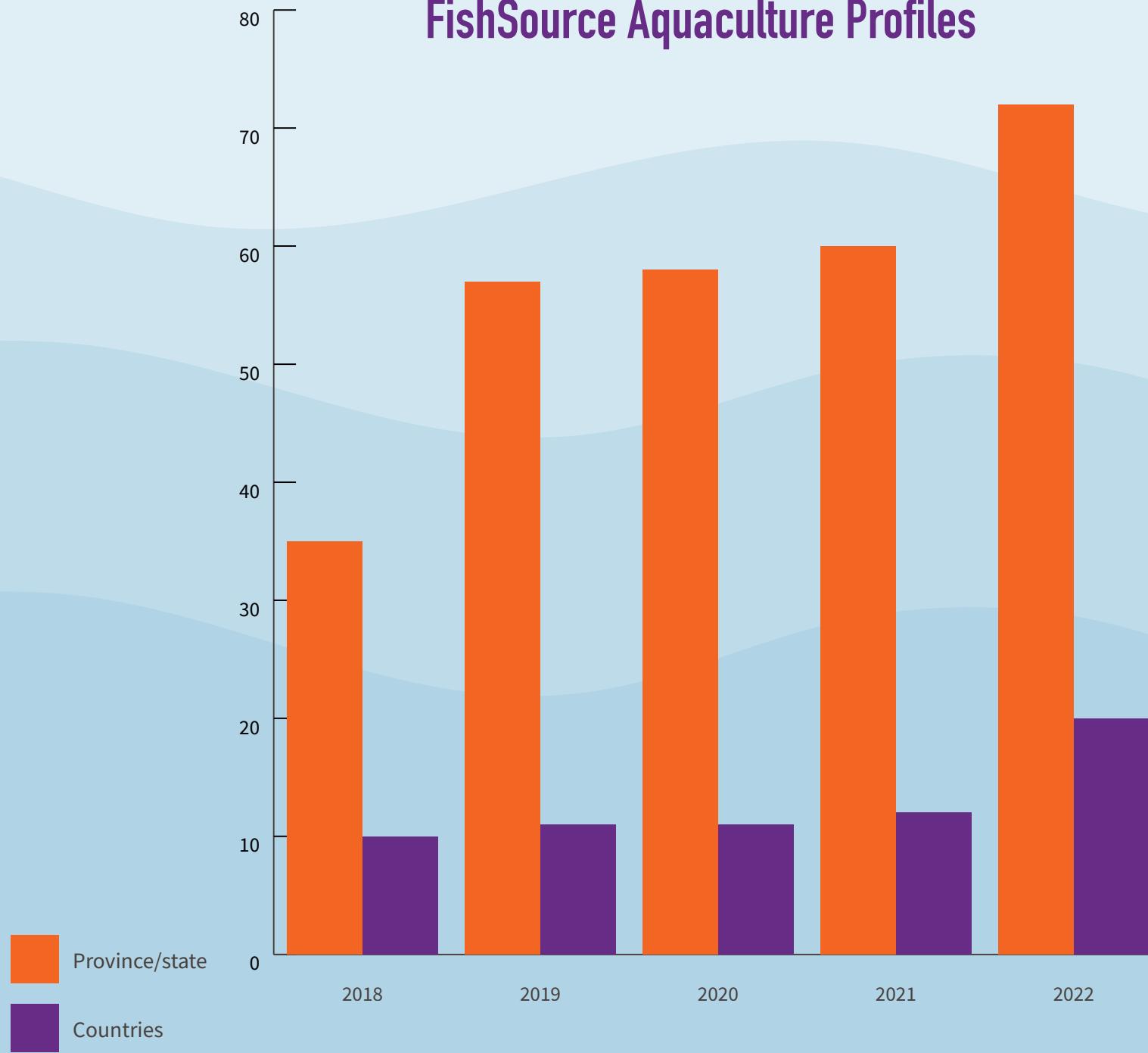


FISHSOURCE  
**15<sup>TH</sup> ANNIVERSARY**

## FishSource Fishery Profiles



## FishSource Aquaculture Profiles

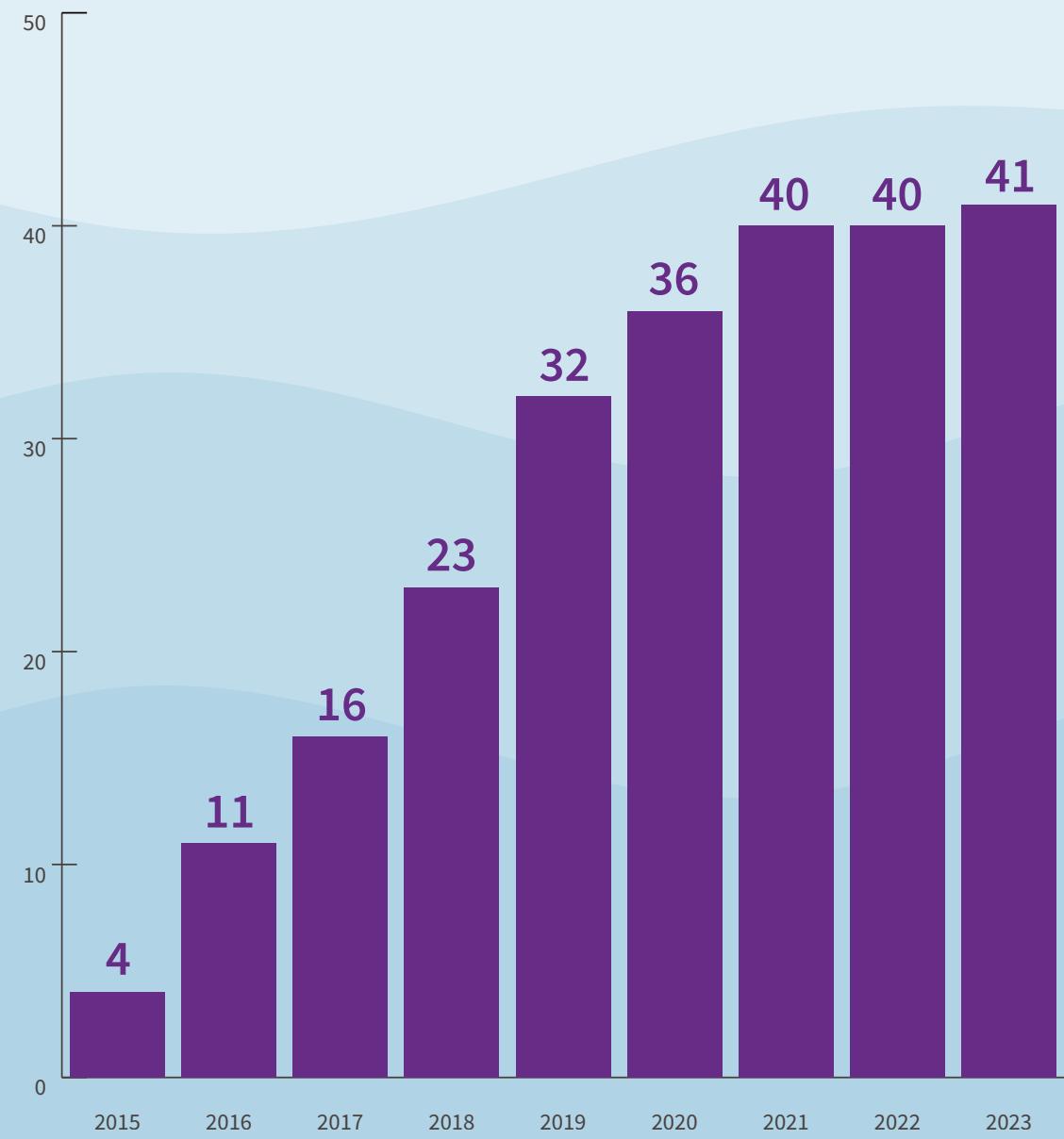


# Ocean Disclosure Project participation remains strong

In February 2023, Good Chop, a US-based meat and seafood subscription service, began disclosing its seafood sources through the Ocean Disclosure Project, bringing total participation to 41 companies.



**Ocean Disclosure Project**



# SEAFOOD

FISH

SHRIMP

SCALLOPS

LOBSTER

CRAB

FRESH  
FISH.  
NEVER  
FROZEN.

NEVER FROZEN  
**FRESH FISH**  
FLAVOR BY THE  
BOAT LTD

THERE'S MORE THAN  
WHAT'S IN THE CASE

MADE EASY

## Information to improve FIP performance

Work by SFP's Science Team is increasing the availability and quality of information on the performance of fishery improvement projects (FIPs). This helps improve FIP design, implementation, and management, and ultimately leads to improvements on the water.

- Each year, SFP and the Hilborn Lab at the University of Washington release an updated version of our **Fishery Improvement Projects Database (FIP-DB)**, to help users understand the influence of external factors on FIP performance and success. The 2022 version of the database featured historical time series data on all 300 FIPs that have been initiated to date.
- SFP's Science Team **published a paper in Marine Biology Research**, offering recommendations for how FIP implementers and stakeholders can better address bycatch of endangered, threatened, and protected (ETP) species through improved mitigation, monitoring, and stakeholder engagement.
- Our FIP Evaluation Team tracks FIP progress via a **monthly ratings report**, and continues to increase transparency of these metrics. FIP trackers containing detailed information on FIP progress, including the stages of the FIP and the latest results, are now directly accessible for all individual FIPs through the Improvement Projects tab on FishSource.



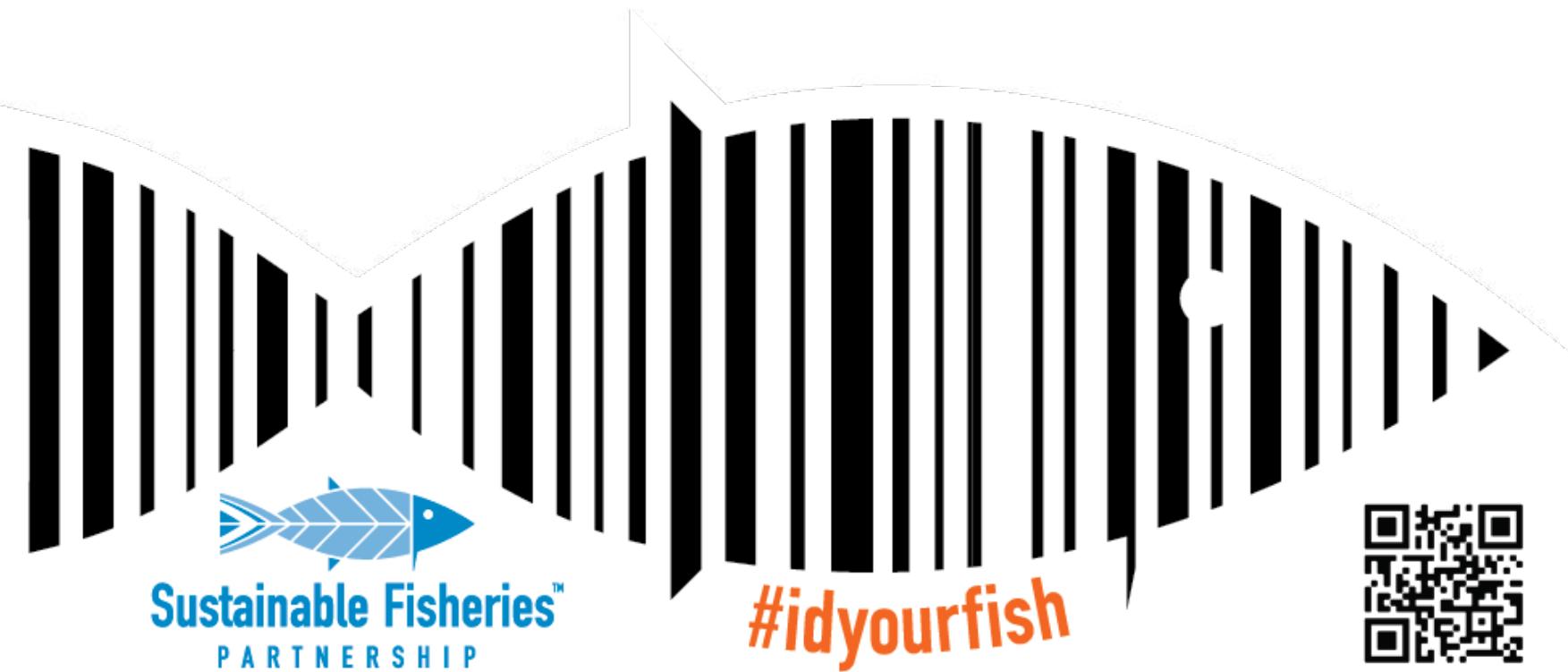
# Sector Sustainability Updates focus industry engagement

Our Science and M&E teams publish regular updates on progress in key global seafood sectors, reviewing recent successes and setbacks, and highlighting the areas that require attention from the seafood industry and policymakers.

SFP's Target 75 (T75) initiative aims to ensure that 75 percent of seafood (by volume) in 13 key sectors is either sustainable or making regular, verifiable improvements. **T75 has become a common goal for the seafood industry and their commitments, bringing them together to create the large-scale change and momentum needed to achieve global seafood sustainability.**

- We published 12 revised and revamped T75 **Sector Sustainability Updates** in 2022, providing summary updates on progress against the 75-percent goal, along with highlights on the most recent trends in production and trade.
- The 13th edition of our sustainability overview of reduction fisheries (**Part 1**, **Part 2**) calls for expanded industry engagement in improvements, highlights the need to better understand the impacts of reduction fisheries on non-target species, and draws attention to potential impacts of climate change on low-trophic-level fisheries and the role these fisheries play in the carbon cycle.





# Universal Fishery IDs

SFP's work on universal fishery IDs helps to remove uncertainty about source fisheries and strengthen traceability for industry, governments, NGOs, and other stakeholders.

The need for reliable information about where their seafood comes from is a major challenge for companies that want to avoid sourcing illegal, unregulated, and unreported (IUU) seafood, as well as for the governments that want to regulate this activity.

- The **UN Food and Agriculture Organization (FAO)** is hosting the fishery-specific identifiers used in FishSource, SFP's one-of-a-kind online resource for fishery information, to establish unique, standardized IDs for all of the world's major fisheries within FAO's Global Record of Stocks and Fisheries (GRSF). The **fishery IDs** will be publicly available and will help ensure that data, reporting, evaluations, and discussions across industry, governments, NGOs, and others will refer to the same stocks and fisheries along a transparent seafood value chain.
- In recognition of our work on universal fishery IDs, SFP was **named an ocean innovator** by the United Nations Development Programme (UNDP). With support from the UNDP Ocean Innovation Challenge, SFP is testing the IDs in a small-scale blue swimming crab fishery in the Philippines, supported by our partners Thai Union and Publix. The pilot project will help determine how best to deploy the IDs to the rest of the global seafood industry and stakeholders.





# Small-scale fisheries and co-management



**SUPPORTING  
SMALL-SCALE  
FISHERIES**

Some of the most significant commercial fisheries in the world – including mahi, snapper and grouper, blue swimming crab, and octopus – are principally fished by small-scale and artisanal fishers. But historically, many of these fisheries lack adequate science and management support, putting the livelihoods of millions of people at risk and threatening the health of the marine environment.



Many of these fishers lack legal rights and are not engaged in the governance of the fisheries, leaving them marginalized and excluded from decision-making processes. This not only threatens their advancement toward improved well-being, it means that their product could be considered illegal, unreported, and unregulated (IUU).

SFP's work focuses on building the enabling conditions for positive change in fisheries governance and the achievement of fairer distribution of benefits through **effective co-management of fisheries**.

Co-management is a partnership approach, where government and the fishery resource users share the responsibility and authority for the management of a fishery, based on collaboration between themselves and with other stakeholders. **Effective participation of small-scale fishers leads to better management policy, tangible social benefits, and, ultimately, greater success of fishery improvement efforts.**

To begin with, SFP is targeting retailers, foodservice companies, and other seafood suppliers to ensure that the **fishers in their source fisheries have legal fishing rights**. This not only helps the fishers, it also benefits companies through assured supply and consistent product quality, an opportunity to demonstrate responsible business practices and meet ESG requirements, and reduced exposure to legal, investment, and reputational risks from buying IUU products.

## Empowering small-scale fishers through fisher registration in Peru

In May 2023, the government of Peru **issued a historic decree** that removed the barriers for more than 900 artisanal vessels in fishing cooperatives to be able to operate legally in Peruvian waters, clearing the way for full formalization of the entire artisanal fleet.

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This victory and other key policy reforms over the past few years are the direct result of an unprecedented alignment of the entire squid supply chain, from fishers to retail buyers, around the need to promote legal fishing rights for the artisanal fleet. Critical to this achievement was the work in-country by SFP-supported organizations including CAPECAL (the Peruvian Chamber for Jumbo Flying Squid), which represents processing plants, and SONAPESCAL (the Peruvian Artisanal Fishing Society), which represents boat owners. SFP works closely with these organizations, providing technical advice and support.



# Transforming seafood markets in the Global South

Transforming regional and domestic markets in the Global South will be critical to SFP's goal of 100% sustainable seafood and a responsible, thriving fishing economy. These markets not only ensure food security, but also support the livelihoods of millions of people.

In contrast to the Global North, where seafood is a culinary specialty, seafood is a staple in the Global South. Furthermore, Global South fisheries, especially artisanal and small-scale fisheries, face challenges arising from governance gaps and the resulting lack of state resources to provide adequate science, management, and enforcement services. These compounded challenges require tailored solutions.

To this end, SFP developed **Better Seafood Philippines (BSP)**, as a project under the USAID FishRight program. BSP aims to improve the environmental performance of local fisheries and safeguard the livelihoods of fishing-dependent communities through the development of a responsible seafood sourcing standard and engagement of domestic retailers in adopting the standard.

Through BSP, major Philippine companies and brands have committed to adopt and utilize the principles of the program, and industry leaders are actively sharing their experiences with integrating responsible sourcing practices into their supply chains. BSP is now in the process of becoming an independent, Philippines-registered NGO, and will continue to work with seafood supply chains.







## PROTECTING OCEAN WILDLIFE

Through our **Protecting Ocean Wildlife initiative**, SFP is working with stakeholders throughout the seafood supply chain to reduce bycatch of endangered, threatened, and protected (ETP) species, such as sharks, sea turtles, marine mammals, and sea birds, in commercial fisheries.

As the impact of ETP bycatch in fisheries is better understood, it has become an increasingly important component of seafood sourcing. But a major obstacle to industry action has been limited and fragmented information on what is being done to address bycatch and how seafood companies can support these efforts.

**Companies want to help fix the problem, but they don't know where to focus or what to do to find solutions.**

SFP's tools and resources remove this obstacle, and use the power and leverage of the world's largest seafood retailers and suppliers to make improvements in their supply chains, all the way to the fishers on the water.

Since we began our bycatch work, we have seen ambitious commitments and concrete progress from our partners in reducing bycatch.

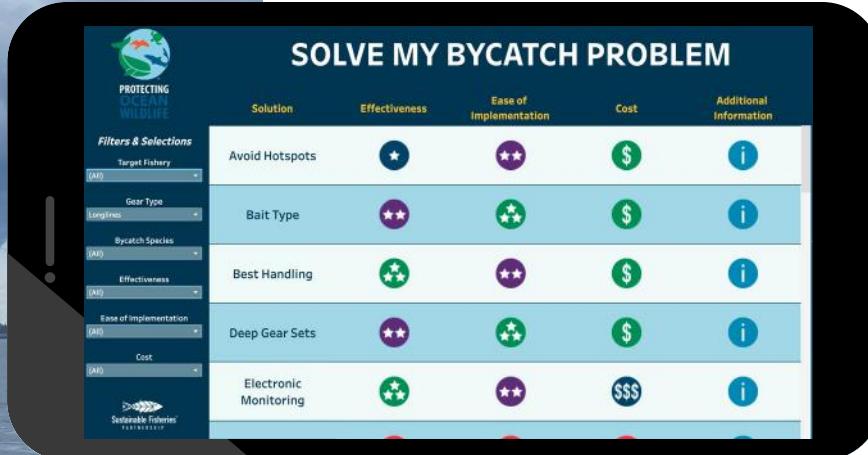
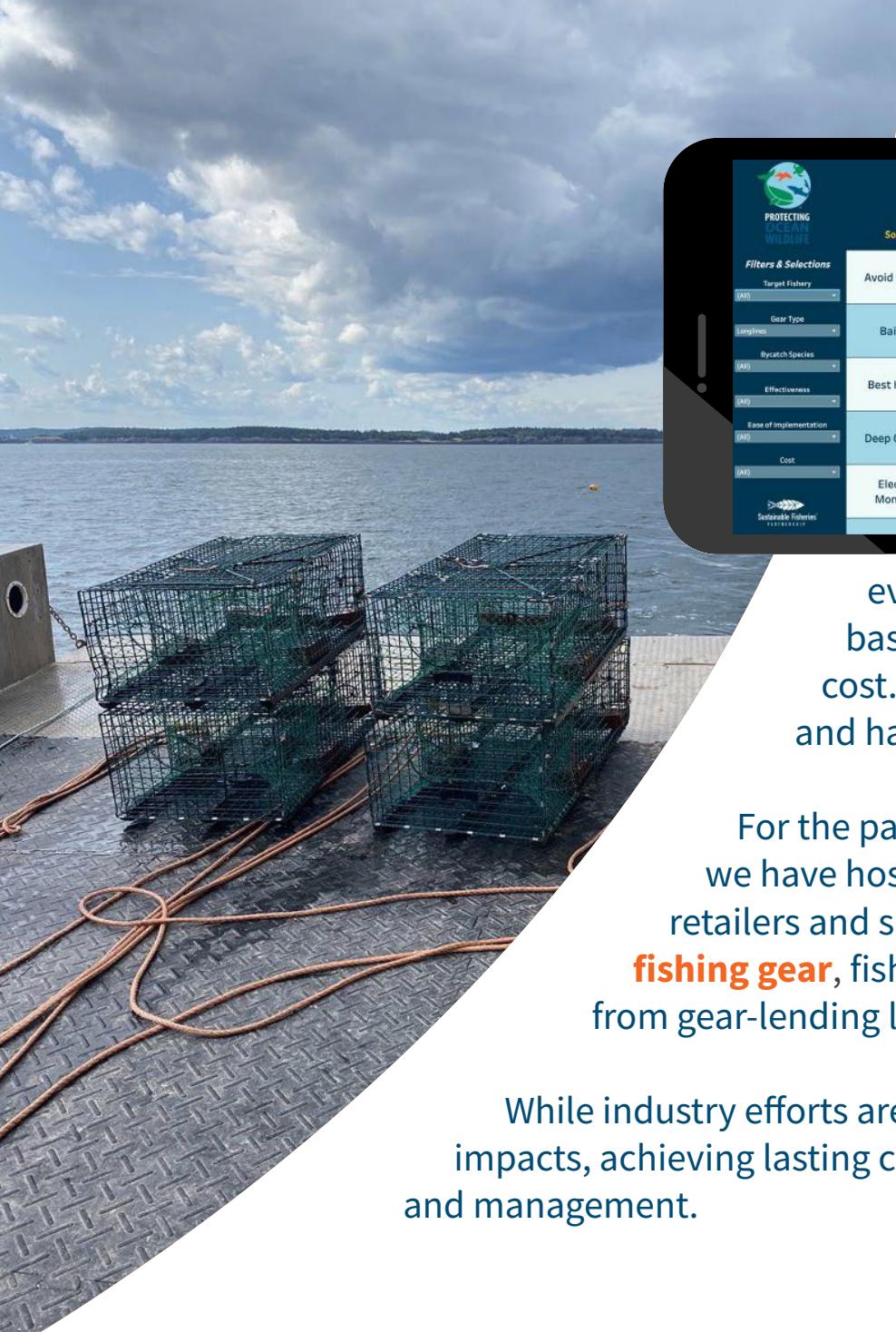
**The scale and influence of these companies means that their actions are potentially transformative for ocean conservation and sustainable seafood.**





A first challenge for seafood companies in taking action is understanding the risks of wildlife interaction in their seafood supply chains. Our **ETP bycatch audits**, conducted in collaboration with Birdlife International and Whale and Dolphin Conservation, help retailers and brands assess the risks to endangered, threatened, and protected (ETP) species in the fisheries that supply them with seafood. These audits identify the areas where a company, based on its specific seafood sourcing, can have the greatest impact by advancing improvements to reduce ocean wildlife bycatch.

This year, SFP completed new audits for UK retailers Co-op and Tesco, US supermarket company Publix, and Thai Union, the world's third-largest seafood company.



Once the risks are identified, a next question becomes how to fix the problem. SFP's online, interactive **Solve My Bycatch Problem tool** allows users to evaluate different methods to reduce wildlife bycatch, based on their effectiveness, ease of implementation, and cost. At launch, the tool focused on tuna longline fisheries, and has now been expanded to include pot and trap fisheries.

For the past two years at Seafood Expo North America in Boston, we have hosted a **Bycatch Solutions Showcase** to connect retailers and suppliers with manufacturers of **ropeless/on-demand fishing gear**, fishers who have piloted the gear, and representatives from gear-lending libraries in the US and Canada.

While industry efforts are vital to changing practices and reducing bycatch impacts, achieving lasting change requires effective fisheries governance and management.

In 2022, we launched a collaboration with the **Global Tuna Alliance (GTA)** to more efficiently focus our efforts in tuna fisheries. SFP will focus on reducing the bycatch of ETP species in tuna fisheries, while GTA will support companies in policy advocacy with regional fisheries management organizations.



A key barrier to widespread implementation of bycatch solutions is that it requires time and money that many fishers cannot afford. To reduce this barrier, SFP created the **Bycatch**

**Solutions Hub**, a web-based platform to connect retailers and businesses that want to financially support projects with organizations capable of implementing in-the-water solutions.

Designed in conjunction with founding sponsor Purina Europe, the Hub is a first-of-its-kind service for the seafood industry, demonstrating industry-led adoption of best practices and the use of technology and innovation to protect ocean wildlife.





# Putting it all together: Thai Union's evolving commitment to reducing bycatch

Thai Union, the world's third-largest seafood company, celebrated the **one-year anniversary of our partnership** this year. During this time, the company has taken concrete steps and made ambitious new commitments to reduce bycatch in its supply chain.

It began with a bycatch audit, conducted by SFP with Birdlife International and Whale and Dolphin Conservation, that identified the risks to sharks, seabirds, turtles, and other marine wildlife in Thai Union's source fisheries. This was accompanied by an analysis by Key Traceability of Thai Union's tuna fishery improvement projects and in the highest risk fisheries identified in the audit.

In March 2023, Thai Union made the commitment to only source from vessels that are implementing best practices to protect ocean wildlife from bycatch and reiterated its commitment to 100-percent observer coverage (human or electronic) on tuna vessels.

This unprecedented commitment creates a new level of ambition for the seafood industry. The commitment is based on the results of the analyses of its supply chain and **research by SFP's Protecting Ocean Wildlife team on the bycatch threats from longline fishing** in commercial tuna fisheries.

Thai Union took its commitment a step further in April 2023, becoming the inaugural signer of SFP's **Protecting Ocean Wildlife Pledge**. Companies that sign the pledge commit to reduce bycatch of vulnerable marine wildlife in commercial fisheries through adoption of best practices and continuous supply chain improvements.

In addition to expanding its own commitments and standards, Thai Union is now using its status as one of the world's largest producers of shelf-stable tuna to call on other companies and seafood industry stakeholders to make similar commitments.



Hundreds of thousands of endangered, threatened, and protected (ETP) species, such as sharks and rays, marine mammals (e.g. whales and dolphins), sea turtles, and seabirds, are harmed or killed as a result of commercial fishing each year.

Businesses throughout the supply chain can contribute to the protection of ocean wildlife by sourcing responsibly, and by supporting capacity building in fisheries and conservation to contribute to scientific understanding of how best to protect ETP species.

We commit to the following actions to support fisheries and the seafood industry in protecting ETP species:

1. Ensure that fisheries we source from have been assessed to identify those with high risk of capturing ETP species e.g., through conducting a bycatch audit
2. Support fisheries to adopt best practices for preventing capture of ETP species and reducing mortality of those that still may be incidentally caught
3. Advocate that fisheries we source from have effective independent observer coverage on board all vessels, in-person and/or electronic
4. Support innovation and science behind best practices to prevent and mitigate risk to ETP species in fisheries, e.g., trialing or adopting gear with less impact, understanding how to avoid and release ETP species, contributing to gear lending libraries
5. Support supply chains in continuous improvement to lessen the impacts on ETP species
6. Publicly report on activities related to this pledge.

ETP species are essential to ecosystems and the health of our oceans. Their ETP status means that continued capture, even of only a few individuals, can harm the population's recovery and further jeopardize the species. The reduction of bycatch of ETP species is essential for any seafood business to be considered responsible, and we urge our colleagues across the industry to join us in making this pledge.



# Kickstarting industry action: Purina Europe and the Bycatch Solutions Hub



The Bycatch Solutions Hub was created with generous founding sponsorship from longtime SFP partner Purina Europe, which was seeking a tool to connect major buyers of seafood that wanted to support bycatch innovations with projects and efforts that needed funding. Beyond just sponsorship, Purina Europe was actively involved in the development of the site, working alongside SFP for months on the design and functionality of the Hub.

# Supporting gear innovation on the water: Publix Super Markets

Longtime SFP partner Publix Super Markets is financially supporting gear innovation and the adoption of electronic monitoring in fisheries identified as high risk in its bycatch audit. Publix worked with SFP to purchase ropeless lobster traps and donate them to the Northeast Fisheries Science Center gear library, which provides the gear free of charge to fishers to test on their vessels. The company also provided funding to equip three fishing boats in its supply chain with cameras and monitoring equipment to collect data on the effectiveness of bycatch mitigation practices in mahi-mahi, swordfish, and yellowfin tuna fisheries in Costa Rica and Panama.

# An expanded commitment to biodiversity and nature

In 2023, Kathryn Novak, formerly our Global Markets Director, took on the role of the first Biodiversity and Nature Director, leading a new portfolio of SFP initiatives and activities to protect marine biodiversity and wildlife.





# PROMOTING SUSTAINABLE AQUACULTURE

SFP is a leader in the science of aquaculture. We are developing a new “landscape-based” approach to regenerate (protect and enhance) aquaculture ecosystems by improving policy and management across whole jurisdictions and actors. This is necessary to effectively address climate change and the cumulative impacts of aquaculture, and to restore habitat, improve water quality, and protect coastal communities.



SFP’s new research finds that a **landscape-level approach to shrimp farming** can contribute to the conservation and regeneration of mangrove forests, capturing **the wealth of ecosystem services that mangroves provide**. The research also shows that both abandoned and active **aquaculture ponds are providing the setting for mangrove recovery and regeneration**. This presents a huge opportunity for the farmed shrimp industry to help bring back lost mangrove habitat.

We promote and support the establishment of landscape-scale aquaculture improvement projects (AIPs), multi-stakeholder efforts to address environmental challenges in aquaculture production. AIPs leverage the influence of the seafood sector to incentivize improvement and make these improvements endure through policy change. Our work is focused on government policies and management requiring sustainable practices at the landscape level.

- We are working closely with the Aquaculture Stewardship Council (ASC) to bring stakeholders and supply chain actors together to drive improvements across whole landscapes through regional-level aquaculture improvement projects (AIPs).
- The UN Food and Agriculture Organization published **a guide to aquaculture improvement projects (AIPs)**, authored by SFP Aquaculture Information Manager Paul Bulcock, highlighting SFP's landscape approach to AIPs, the relationship between AIPs and farm-level certification standards, and the role the private sector can play in driving change.
- A **three-part webinar series**, co-hosted by SFP and our Asian Farmed Shrimp Supply Chain Roundtable, shared learnings from ten years of developing aquaculture improvement projects (AIPs). Topics included why farm certification is not enough, how to get started with AIPs and landscape management, and how AIPs can increase supply chain traceability.

## Supporting mangrove regeneration through coastal shrimp farms

To help the farmed shrimp industry more effectively identify and protect mangrove habitat, SFP and Longline Environment developed a **mapping tool to show where shrimp farming is located within or adjacent to mangrove habitat** in India, Indonesia, Thailand, and Vietnam.



# 2022 DONORS AND FUNDERS

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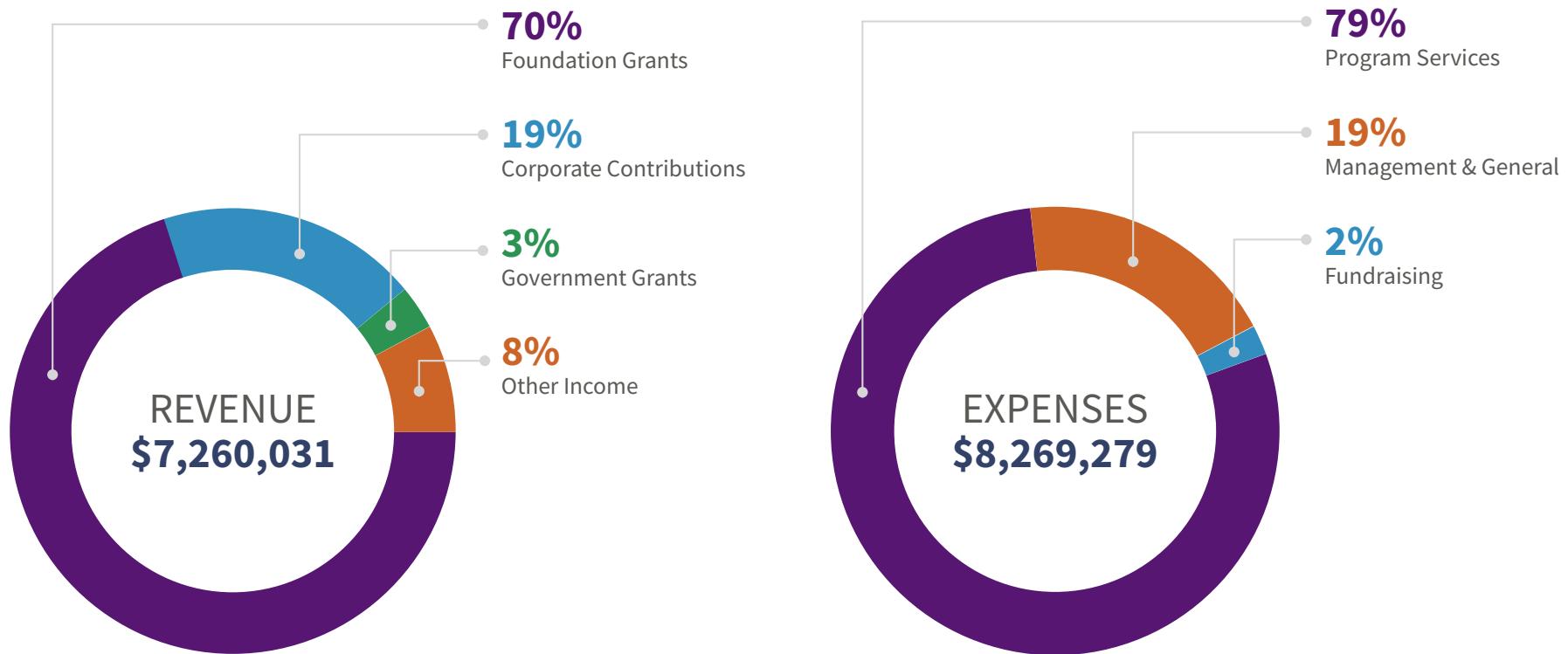
# BECOME AN SFP SUPPORTER

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SFP works toward a future where all seafood worldwide is sustainable and ocean ecosystems are thriving. But we can't do it alone. We have long benefited from the generous support of private foundations and international development agencies, all with an eye toward a sustainable future.

As a registered nonprofit, our success depends on like-minded individuals. If you or your organization are interested in contributing to our work, [contact SFP at info@sustainablefish.org](mailto:info@sustainablefish.org).

# FINANCIALS 2022



Under Generally Accepted Accounting Principles (GAAP), restricted contributions are generally reported as revenue when received, and these revenues may be used to fund expenses for future periods. As shown in the table below, revenues received in 2020 were used to fund 2021 and 2022 expenses.

	2018	2019	2020	2021	2022
<b>Revenues</b>	8,135,760	7,616,735	9,218,676	7,333,769	7,260,031
<b>Expenses</b>	7,333,892	7,712,357	7,563,297	7,519,228	8,269,279

# STATEMENT OF ACTIVITIES

Year Ended  
December 31, 2022

<b>SUPPORT AND REVENUE</b>	<b>WITHOUT DONOR RESTRICTIONS</b>	<b>WITH DONOR RESTRICTIONS</b>	<b>TOTAL</b>
Foundation and government grants	\$318,750	\$5,038,282	\$5,357,032
Corporate grants and sponsorships	919,160	430,107	1,349,267
Contracts	453,730	-	453,730
Contributed services	93,568	-	93,568
Other contributions	5,856	-	5,856
Registration fees and other income	578	-	578
Net assets released from restrictions			
Expiration of time restrictions	1,264,531	(1,264,531)	-
Satisfaction of purpose restrictions	5,209,069	(5,209,069)	-
<b>Total support and revenue</b>	<b>8,265,242</b>	<b>(1,005,211)</b>	<b>7,260,031</b>

## EXPENSES

Program services	6,518,806	-	6,518,806
Supporting services			
Management and general	1,552,648	-	1,552,648
Fundraising	197,825	-	197,825
<b>Total expenses</b>	<b>8,269,279</b>	<b>-</b>	<b>8,269,279</b>
<b>Change in net assets</b>	<b>(4,037)</b>	<b>(1,005,211)</b>	<b>(1,009,248)</b>

## NET ASSETS

Beginning of fiscal year	1,831,301	4,686,810	6,518,111
End of fiscal year	\$1,827,264	\$3,681,599	\$5,508,863

# SFP TEAM

*This list includes staff of SFP from January 1, 2022, to August 1, 2023.*

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### **Blake Lee-Harwood**

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### **Kathryn Novak**

Biodiversity and Nature Director

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### **Courtney Sakai**

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### **Braddock Spear**

Global Policy Director

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