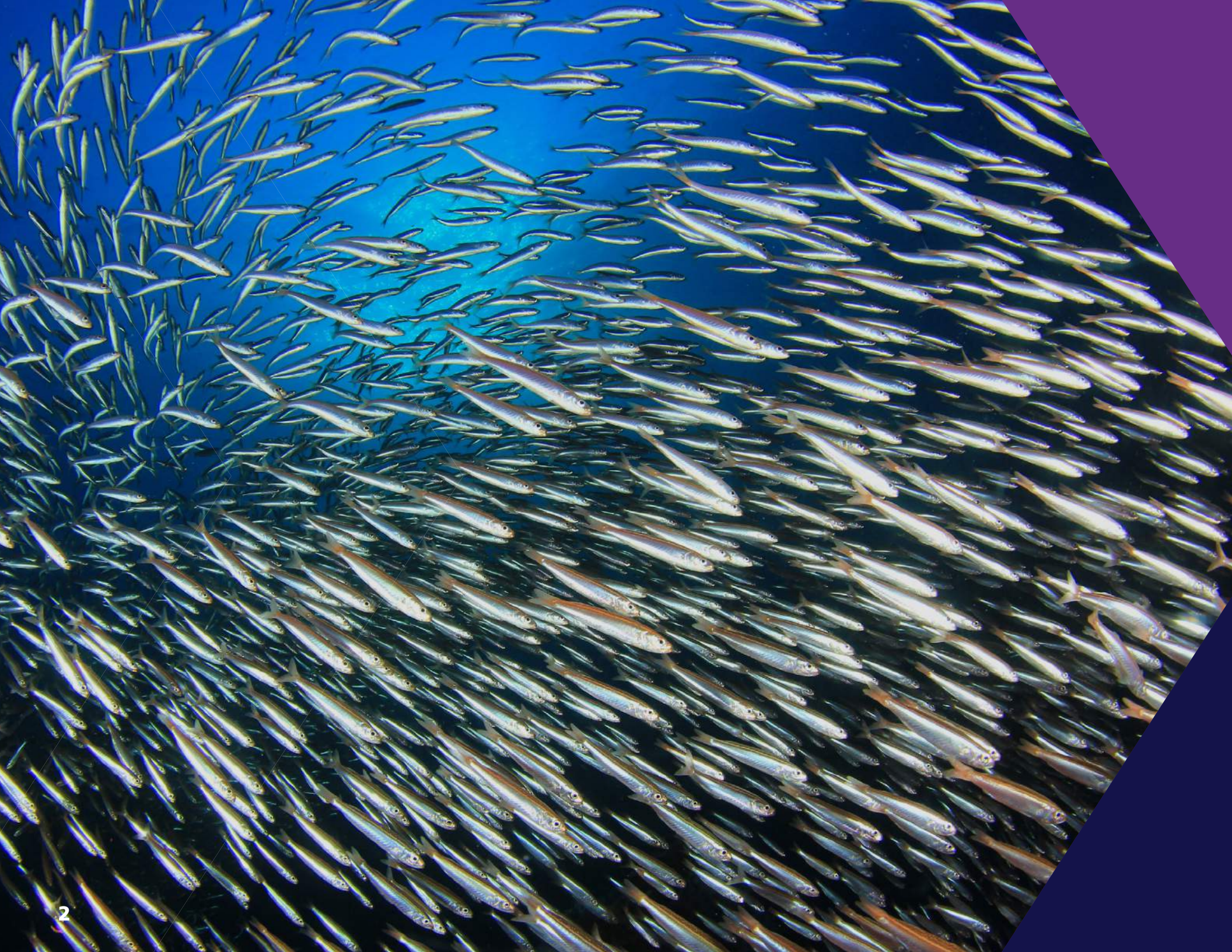




INNOVATION



Sustainable Fisheries™
PARTNERSHIP





INNOVATION

i-nə-'vā-shən (noun)

1. a new idea, method, or device
2. the introduction of something new

(Merriam Webster)

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MESSAGE FROM OUR CHAIR

I first encountered SFP and its innovative approach when I was developing a sustainable seafood policy for Davigél, which was then a part of Nestlé.

There were lots of organizations working on seafood sustainability. Many were focused on campaigns, pointing out what industry was doing wrong and not necessarily offering advice on how to do better, let alone specific tools to fix the problems.

This is where SFP stood out, offering the opportunity for an actual partnership and an approach that involved working *with* rather than *against* industry.

SFP had the tools, in FishSource and Seafood Metrics, that we needed to develop our sustainable seafood policy. And the fact that these tools were science-based was appealing, because it meant our progress could be quantified by an external independent organization, with results we could then convey to our customers.

But while I was convinced about SFP, it can be challenging to take a risk and go a different way. It is certainly easier to say you only buy from certified fisheries than to explain how you are working with producers and local stakeholders to improve struggling fisheries through fishery improvement projects (FIPs). It was also risky to go with a relatively small, relatively unknown organization over higher-profile organizations with well-known logos and reputations.

Ultimately, though, I made the decision to work with SFP – and it paid off.

SFP helped us more precisely define the elements of our sustainable seafood policy. FishSource and Seafood Metrics gave us the tools to understand how to improve our performance and to measure the progress we were making. And, eventually, the Ocean Disclosure Project provided a way to publicly report that progress externally to our customers and the public.

When this approach began to result in increased sales and new customers, few could argue with my decision. In sales, you can differentiate yourself in three ways: price, quality, and sustainability. We weren't always the cheapest option, and it can sometimes be difficult to measure quality, but our sustainability indicators, backed up by the science-based measurements of SFP, were a way to differentiate us in the market.

Every company says they are the best, but we were able to prove it.

SFP's innovative approach has been changing the face of sustainable seafood for more than 15 years. But it is important to keep evolving – something SFP is very good at. In recent years, we have expanded our focus to new issues, new categories of seafood, and new geographies, all critical in terms of worldwide seafood sustainability.

We have also expanded our network of influence. SFP still has a key focus on industry leadership. However, we now also work with governments, development agencies, foundations, small fishing communities, and fish farming cooperatives. This approach is based on the idea that you can't just throw out a solution and insist that others adopt it. You have to work together with all parties to figure out what needs to be done and develop and implement solutions to improve seafood sustainability.

Before I close, I'd like to touch on one more area of evolution at SFP: the expanded role of our Board of Directors. In recent years, our Board has become more diverse, in terms of gender, age, and professional background. Now we have the capacity and the ability to help SFP's staff and chief executive officer elaborate the organization's strategy and support the continued process of innovation at SFP. I look forward to that challenge.

Jean-Louis Meuric
Dieppe, France







MESSAGE FROM OUR CEO

I didn't set out to be an innovator. And I certainly never planned to start a brand-new NGO. But two decades ago, as I began a deep dive on fisheries sustainability, I realized that I could only get where I wanted to go by starting something new.

Broad change and innovation requires three types of people: the inventors who create new ways of doing things, the test pilots who see if these inventions can work in the real world, and the mass producers who figure out how to distribute a product or service to the entire world.

The mad-scientist inventors tinkering in their garages and the glamorous test pilots who risk everything to prove a point usually get all the glory. But it's the mass producers who save the world. For change to have a global impact, it needs to be replicated and scaled-up everywhere.

This model applies well to fisheries management and marine conservation. While new inventions and pilot testing will create even better ways of doing things someday, the existing best practices that are working in the real world can save fisheries and protect the oceans – but only if they are widely adopted.

This is where SFP comes in. We are not creating a lot of new fisheries management or conservation tools. Instead, what we do is identify best practices. Then we innovate like crazy to create tools, systems, and methodologies to advance adoption and implementation of these best practices around the world.

Through our innovations, we bring industry to the table, give them affordable access to information on best practices, and organize them for maximum impact in spreading the use of these practices at a global scale.

This is why I think of our team here at SFP as “innovators by necessity,” plugging away to produce good fisheries management and marine conservation worldwide. Over the years, we have had to continuously innovate, because we kept finding that what we needed to achieve our goals simply did not exist anywhere else.

In the pages of this report, you will find more detail on the various tools, programs, and concepts that make up SFP's approach, but let me give you a broad preview.



Our first and most fundamental innovation was how we (an environmental NGO) work with industry. Twenty years ago, the relationship between NGOs and industry was adversarial, to say the least. When I started SFP, the idea of working directly with major corporations was definitely not mainstream.

SFP is built on this big idea. We see fishers and the seafood industry as allies, not opponents. From day one, we chose to listen to the industry and develop solutions together with seafood companies as collaborators and partners.

A second fundamental innovation is our structure as a fully virtual organization. Although we have all become a little too familiar with working from home in the last few years, when we created SFP, it was almost unheard of to have no headquarters and your entire staff working remotely.

But this model means that we can hire talent where it is needed

around the world, and recruit the best people for the jobs we have, no matter where they are located. It has allowed us to give our employees the flexibility and freedom to be able to devote themselves to their families and their lives, as well as their work.

Our approach and structure have produced a stream of innovative work and activities, in two main buckets: (1) how we work with industry, and (2) science, data, information, and communications to enable change.

We look to seafood companies as the experts in their fields. They know what they need, what is possible, and, often, what it will take. So, we see industry as active participants in figuring out the challenges to achieving sustainability, what needs to be done, who needs to do it, and how.

This philosophy got its start with the fishery improvement project (FIP) model. For the first time, FIPs brought together retailers,

processors, producers, fishers, and other stakeholders, to demand and leverage better management of wild-capture fisheries and address the root causes of fishery depletion. When we launched the first FIP, this was revolutionary stuff. Today, it is a standard approach to fisheries improvement.

Over the years, we have evolved this work, developing aquaculture improvement projects (AIPs), promoting industry leadership of FIPs, organizing industry into Supply Chain Roundtables (SRs) to work together pre-competitively to scale-up individual efforts, and advancing shared global aims for seafood sustainability through our Target 75 initiative.

Today, the majority of FIPs are industry-led, and more are established each year. Now we are focused on fixing the challenges and problems that prevent FIPs and AIPs from fully succeeding. These include reducing bycatch of ocean wildlife, increasing the ability of small-scale fishers to participate

in effective co-management, establishing effective landscape-based aquaculture management, and compelling greater government action on illegal, unregulated, and unreported (IUU) fishing.

As we were establishing this new way of working with the seafood industry, we discovered that we didn't have the tools to support this approach, and that we would need to create tools and systems to provide the information and data to support our efforts.

To focus on fixing fisheries, we needed to differentiate fisheries at the appropriate scale, with high-resolution science and data. This led us to develop FishSource, our online database of fisheries and aquaculture information.

FishSource was a great first step, giving seafood companies the data they needed to identify and understand their source fisheries.

But we soon realized that companies needed a way

to communicate FishSource information, to enable their fish buyers to act on the data. Out of this, Seafood Metrics was born, to measure progress and performance. This then led to the Ocean Disclosure Project (ODP), now the world's leading seafood transparency platform. The ODP enables companies to publicly report their seafood sourcing, the sustainability of those sources, and their corporate sustainability policies and commitments.

Some say imitation is the sincerest form of flattery. And, if that is the case, then I am very flattered. SFP's innovations, once considered unusual and unorthodox, have now become the accepted approach to sustainable seafood around the world.

While I'm proud of all that SFP has accomplished and how our innovations have entered the mainstream, I know that there will be more in our future. We need to find more efficient, lower-cost ways to assess, monitor,

and manage fisheries, to make fisheries management accessible and affordable for all fishing countries. And, we need to embed climate change resilience and adaptation, social issues, and marine biodiversity into the standard FIP model.

So we will continue to innovate at SFP, and keep producing better fisheries management and marine conservation around the world, toward our goal of 100-percent sustainable seafood.

Jim Cannon
Honolulu, Hawaii



WHO WE ARE

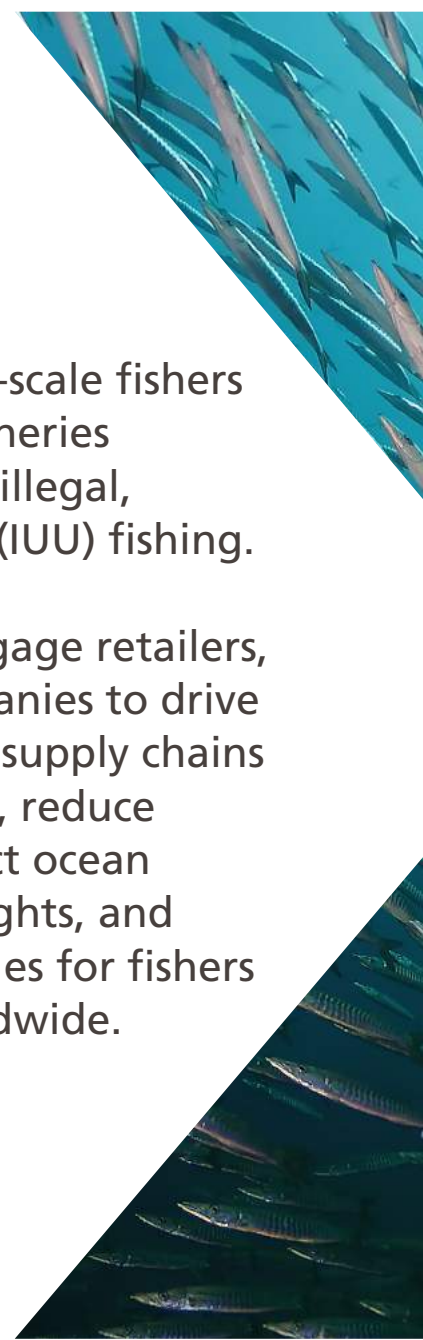
Sustainable Fisheries Partnership (SFP) is dedicated to protecting marine and aquatic ecosystems and delivering a secure seafood supply through the creation of a thriving and responsible seafood economy.

We are working toward a world where the oceans are healthy and abundant, all seafood is produced sustainably, and everyone has access to sustainable seafood.

At a minimum, this means ensuring the recovery and continued productivity of fisheries and fish farms. But it also means reducing the bycatch of ocean wildlife such as sharks and sea turtles, establishing landscape-based aquaculture to address habitat impacts and environmental and

social risks, empowering small-scale fishers to effectively participate in fisheries management, and combating illegal, unreported, and unregulated (IUU) fishing.

To achieve these goals, we engage retailers, brands, and foodservice companies to drive actions through their seafood supply chains to rebuild depleted fish stocks, reduce environmental impacts, protect ocean biodiversity, address human rights, and advance economic opportunities for fishers and fishing communities worldwide.





We are working toward a world where the oceans are healthy and abundant, all seafood is produced sustainably, and everyone has access to sustainable seafood.



SFP's innovation extends to the very structure of our organization. From the start, SFP has been a virtual organization, with a network of staff working all over the world. This model allows us to recruit the best talent from around the world and provide a high level of responsiveness and flexibility in working with partners and the seafood supply chain.

Yet, for all its benefits, a virtual organization is not without its challenges. It can be easy to feel isolated working thousands of miles from your colleagues, not to mention the juggling of time zones. Maintaining a sense of community and common goals requires constant contact, sophisticated software and systems, and solid teams that can count on each other to achieve our goals. This has resulted in a remarkably tight-knit team for people who do not regularly work together in person.

This closeness has been tested over the last few years, as the COVID-19 pandemic has prevented us from holding our annual meetings, which have always been a chance for far-flung colleagues to spend time together in person. Yet, through frequent video calls and constant collaboration, we have stayed a tight team, and it was a welcome reunion when we were able to get together again in 2022.



SFP RETURNS TO THE SEAFOOD SHOWS

After two years of cancellation due to the COVID-19 pandemic, the major global seafood shows returned in-person. SFP was one of the only NGOs to have teams on the ground, ready to reconnect with partners and colleagues and promote our approach to sustainable seafood, tools, and services to seafood buyers, suppliers, and producers.

SEAFOOD EXPO NORTH AMERICA

(Boston, Massachusetts)

Global Mahi Supply Chain Roundtable Director Amber Von Harten (on right) moderates a panel of Peruvian and US seafood companies at the launch of the Peru Mahi Alliance, a pre-competitive partnership of 13 Peruvian mahi companies that is formally assuming the leadership of the Peru mahi - longline FIP.

Program Director Dave Martin (third from left) participates in a panel on "Integration of Seafood Certification: Scaling Improvements in Aquaculture," discussing ways to measure progress and performance of aquaculture producers who are not yet certified.



Global Policy Director Brad Spear (on right) hosts a panel on combating IUU squid fishing on the high seas.



Global Squid Supply Chain Roundtable Director Carmen Gonzalez-Valles with Juan Redini, president of the Argentine Chamber of Jigger Fishing Vessels Shipowners (CAPA), at the formal launch of the Argentine Shortfin Squid - jig fishery improvement project (FIP) in Boston.



Aquaculture Information Manager Paul Bulcock welcomes visitors at SFP's booth.

GLOBAL SEAFOOD EXPO

(Barcelona, Spain)

- ✓ Global Markets Deputy Director Ian Rolmanis (*second from left*) and Chief Executive Officer Jim Cannon (*third from left*) meet with seafood industry representatives.



- ✓ Global Squid Supply Chain Roundtable (SR) Director Carmen González-Vallés (*third from left*) participates in a panel about pre-competitive collaboration in the seafood supply chain, highlighting the Squid IUU Prevention Group formed out of the squid SR.



- ✓ Arlin Wasserman of food strategy consultancy Changing Tastes talks about trends and opportunities for octopus in the US market, at an event hosted by SFP with Changing Tastes.





◀ SFP staff meet with Hookpod International.



◀ SFP's stand on the show floor.

HAPPY BIRTHDAY SFP!

In 2021, we celebrated our 15th anniversary with a new website, celebratory logos, and a commemorative book, including timelines and highlights of how SFP made sustainable seafood into what it is today.



“ SFP created a **new path to sustainability**. We proved that we could achieve conservation goals at a large scale by working directly with the seafood supply chain.”

–Purbasari (Sari) Surjadi, chief of staff and a founding member of SFP



A photograph of a boat on the water, with numerous squid hanging from lines on the deck to dry. The squid are white and appear to be cleaned and prepared. The background shows a calm body of water and a distant shoreline with some buildings and greenery under a clear blue sky. The text is overlaid on the image, with 'SFP'S APPROACH' and 'SEAFOOD' in white, 'TO SUSTAINABLE' in orange, and three orange chevrons pointing right.

SFP'S APPROACH TO SUSTAINABLE SEAFOOD >>>

From our earliest beginnings, SFP has been pioneering new approaches to improving fisheries and aquaculture. **Our strategy is based on the idea that all seafood can be produced sustainably.**

Our CEO and founder Jim Cannon created SFP because he saw that the conservation world needed a new model for driving change in commercial sectors. Breaking from traditional environmental campaigning and direct action that called out companies for poor practices and boycotting products, Cannon believed more progress could be made by working with companies rather than against them.

SFP was the first NGO to bring the seafood industry into the sustainability conversation on a significant scale. Our goal has always been to generate change in the seafood industry by working from the inside out. We engage companies to help them understand why they should care about sustainable seafood and what they can do to support it, rather than imposing our demands on unwilling or uninterested audiences.

This engagement includes one-on-one partnerships with individual companies and collaborations throughout the supply chain. We turn seafood companies into vocal advocates for sustainable fisheries – asking them to speak out on certain issues and actively engaging with their supply chains to create and drive lasting change.

Fisheries are complex systems, with multiple competing companies and often managed by multiple governments. One company may not have enough leverage to make a difference, and even the largest companies can struggle to get government support for their requests if they are acting alone. **But many companies working together can impact policy, practices, and perspectives, leading to broad-scale systemic change.**

In the following pages, you will learn more about SFP's innovations in the sustainable seafood space, from how we work with industry and the methods we use to drive improvements, to how we generate and disseminate the science, data, and information needed to support this work.

HOW WE WORK WITH THE SEAFOOD INDUSTRY





“SFP created the model
for fisheries conservation
that now is the standard
approach to seafood
sustainability by retailers,
foodservice companies, and
brands around the world.”

—Jim Cannon, founder and chief executive officer



Building on our commitment to collaboration with companies, SFP transformed the way the seafood industry thinks about seafood sustainability by developing approaches and models for delivering fisheries and aquaculture improvements.



➤ FISHERY IMPROVEMENT PROJECTS

SFP's first innovation was the fishery improvement project (FIP) model to address environmental challenges in marine fisheries. SFP Chief Executive Officer Jim Cannon led the establishment of the very first FIP, which was created to address the problem of collapsing cod fisheries in the Baltic Sea.

A FIP brings 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.

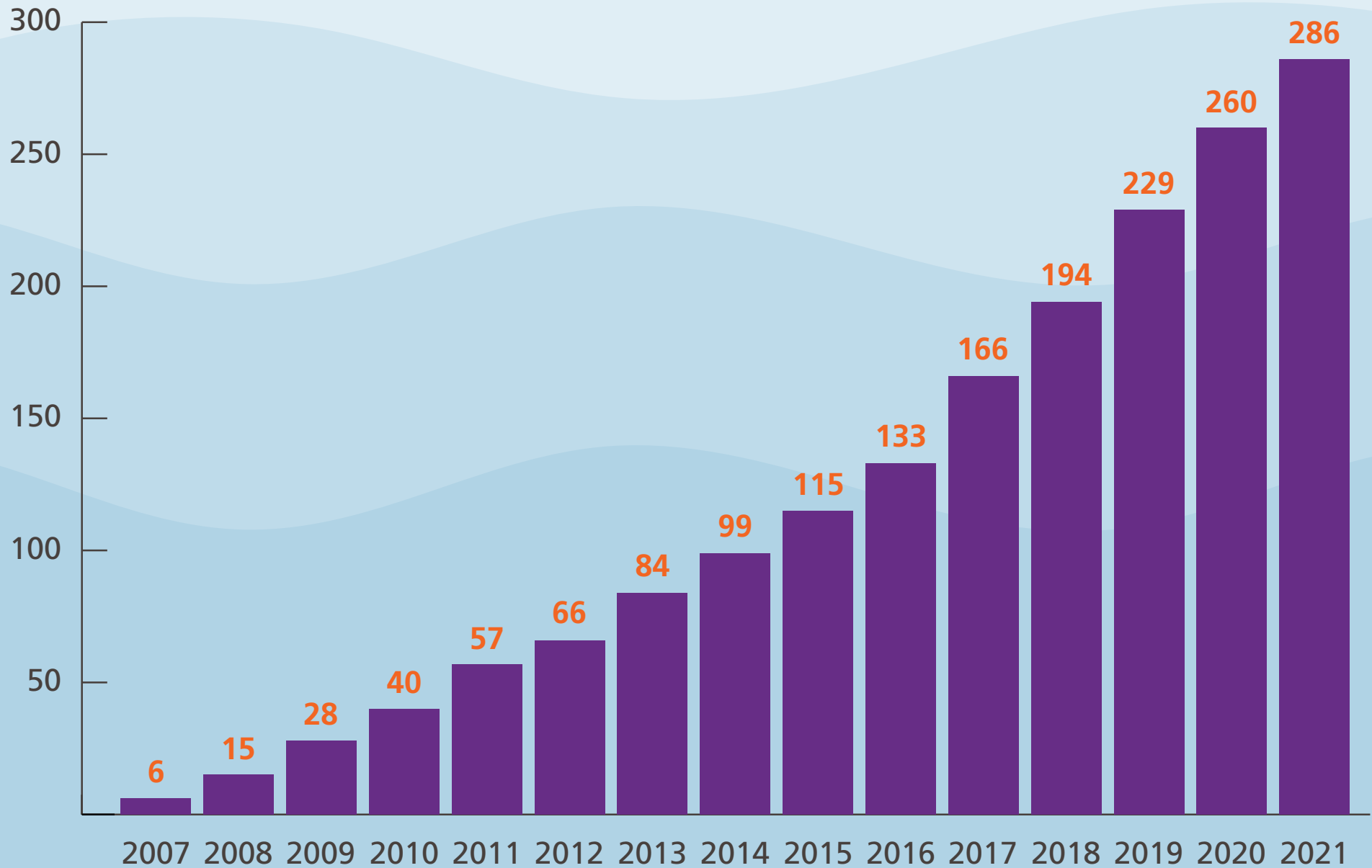
Each fishery is different and FIPs must be tailored to address specific needs. However, all FIPs share a common process and elements. SFP developed a standard toolkit of products to help industry and stakeholders initiate, fund, implement, and evaluate FIPs.

SFP also created the FIP Evaluation Program, a standardized way to assess and evaluate the progress being made by FIPs around the world, including a widely adopted tool and rating system.

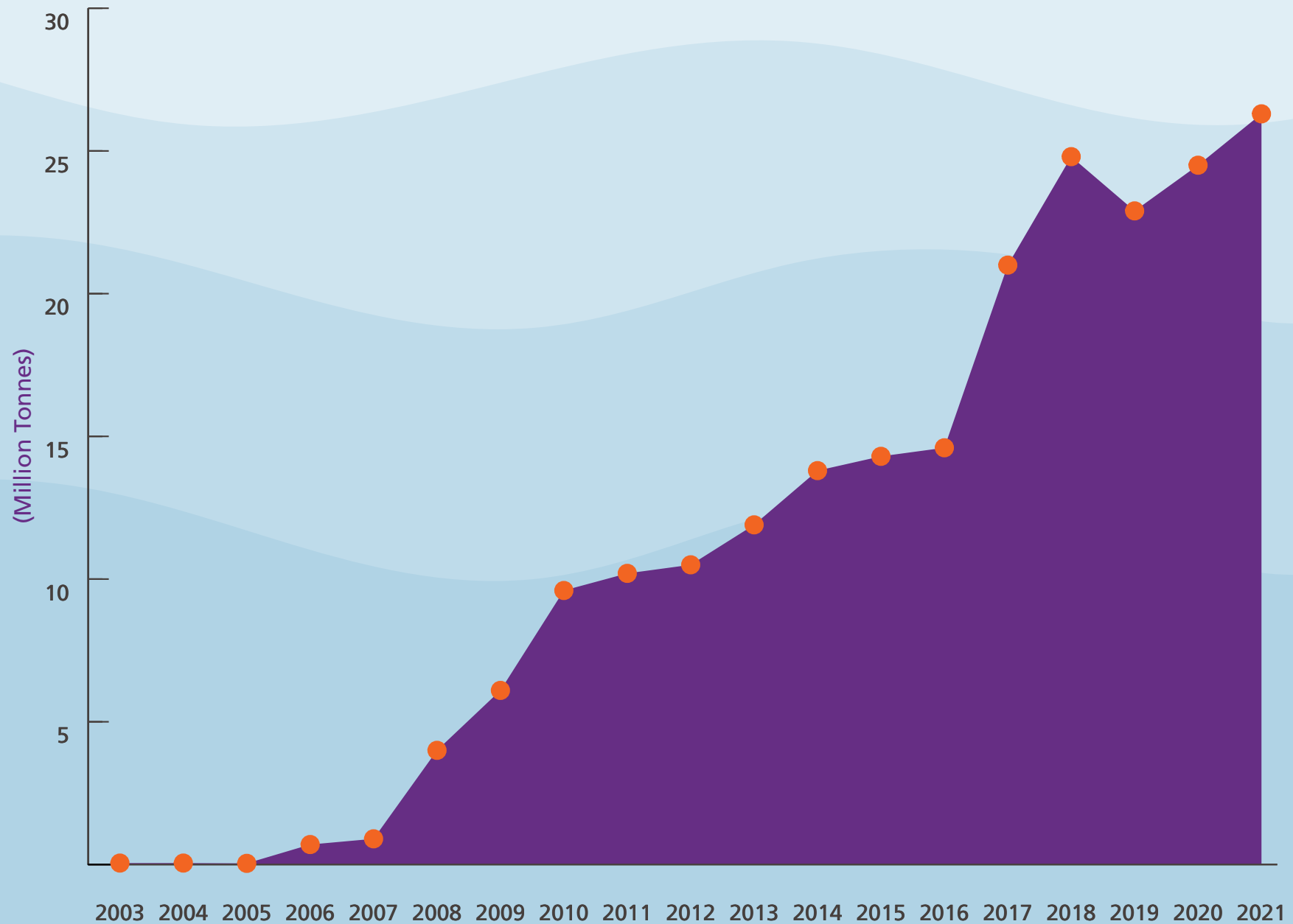
SFP's FIP Evaluation Tool defines and assesses FIPs against six stages of achievement. This Progress Ratings system is the first and only methodology that applies time benchmarks to quickly understand the rate at which a fishery is improving. Our Progress Ratings are the lead metric on FisheryProgress.com, the online platform where FIPs are publicly reported and reviewed. FisheryProgress.com is widely used by the seafood industry in making decisions about their sourcing.

In 2021, SFP published a major update to the FIP Evaluation Tool. This includes new requirements to better evaluate the link between FIP tasks or actions and results, to increase transparency about whether the FIP's actions are driving improvements on the water. The evaluation process and time benchmarks were also adapted to encourage more regular reporting of FIP actions.

Cumulative Number of FIPs Established Through 2021



Cumulative Production from Stocks Associated to All FIPs, Current and Historical





Fishery Improvement Projects Database (FIP-DB)

In 2022, SFP and the Hilborn Lab at the University of Washington released an updated version of their **Fishery Improvement Projects Database (FIP-DB)**.

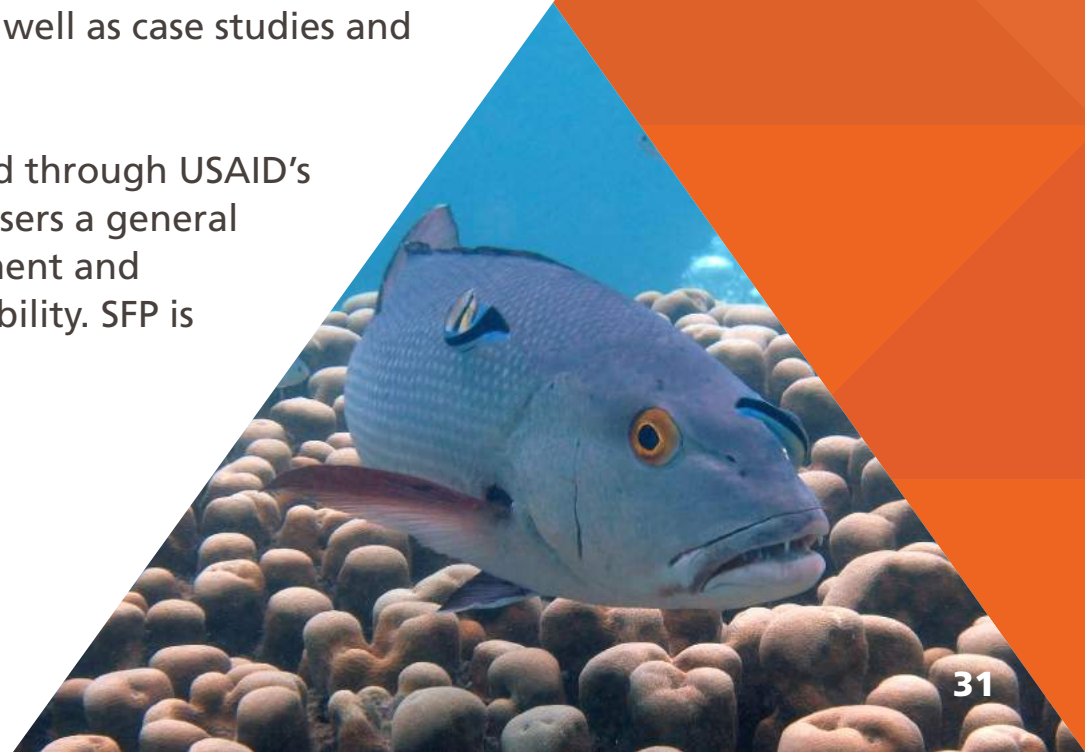
The FIP-DB is the most comprehensive database of its kind. It includes data on all 275 recorded FIPs known to have been publicly launched to date.

The FIP-DB is a vital tool for understanding what policy approaches work in a FIP, which countries and fisheries have made the most advances in management performance, and what are the underlying factors that contribute to improvements in a fishery.

Online Training Programs Provide Support for Fishery Improvement Actions

Working with WWF and several other organizations, SFP developed an **online training program** to provide fishery stakeholders with the knowledge and skills to develop and implement fishery improvement projects (FIPs). The program consists of seven different courses, as well as case studies and additional resources.

Another **set of training modules**, developed through USAID's FishRight program in the Philippines, offers users a general background on the sustainable seafood movement and introduces market tools to help advance sustainability. SFP is an implementing partner for FishRight.



➤ AQUACULTURE IMPROVEMENT PROJECTS

Following the success of the FIP model, SFP focused on a similar approach to aquaculture. SFP created aquaculture improvement projects (AIPs), multi-stakeholder efforts to address environmental challenges in aquaculture production. Like FIPs, AIPs leverage the influence of the seafood sector to incentivize improvement and make these improvements endure through policy change.



As with FIPs, SFP developed a toolkit to guide stakeholders in initiating and running AIPs, complete with a series of templates and examples of documentation to support project implementation.

Given the nature of fish farming operations, a key difference is AIPs operate at scales larger than the individual farm level, focusing on

policies that require sustainable practices and improved government management at the landscape level.

SFP's **Framework for Sustainably Managed Aquaculture** provides a roadmap for landscape-based aquaculture management.

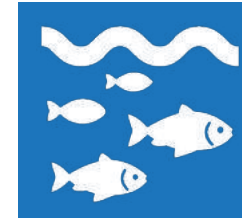


AIPs leverage the influence of the seafood sector to incentivize improvement and make these improvements endure through policy change.

AIP Summary

As of March 2022

of AIPs



10

TOTAL
PRODUCTION
(all AIPs tonnes)



175,400

SPECIES
GROUPS



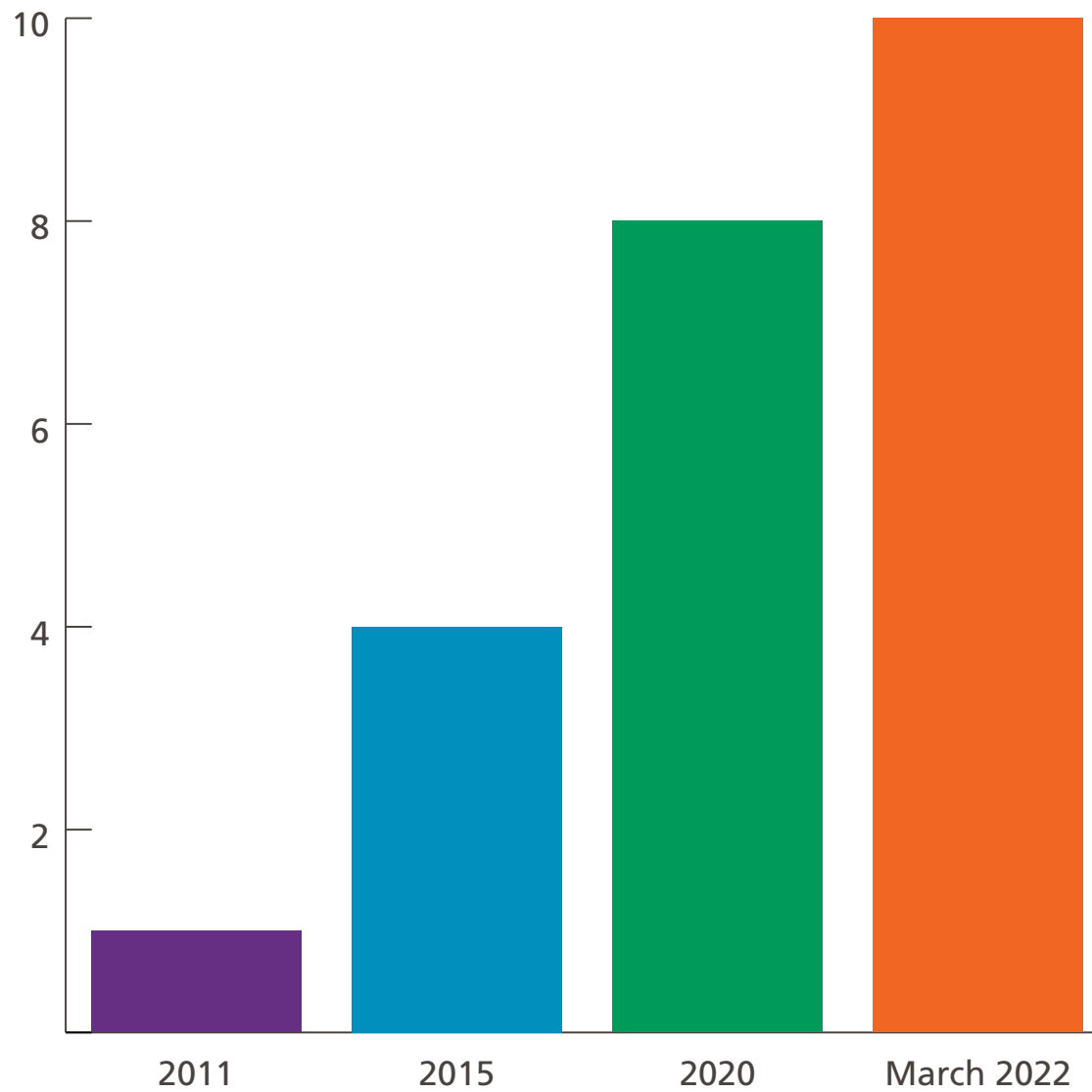
Shrimp: 9
Tilapia: 1

COUNTRIES



China
Indonesia
Thailand
Vietnam

Growth in Aquaculture Improvement Projects



➤ SUPPLY CHAIN ROUNDTABLES

For many years, SFP worked closely with the seafood supply chain to develop and run demonstration FIPs in fisheries around the world. As more and more FIPs were established, SFP began to cultivate industry leadership in the development and implementation of FIPs. Today, more than half of all FIPs are industry-led, and more are being introduced each month.

About a decade ago, SFP decided to stop directly running FIPs and focus on creating a new solution to address emerging issues, resulting in the Supply Chain

Six Supply Chain Roundtables (SRs) now have industry chairs, who work closely with SFP leads to set priorities, drive progress, recruit additional participants, and raise funds.

Originally supported through philanthropic funding, many of the SRs are now becoming more financially self-sufficient. In 2021, the US Gulf of Mexico Shrimp SR became one of the first 100-percent industry-funded SRs, through support of the participating companies.



Roundtable (SR). The SR concept grew out of the need to organize and maximize the benefits that could be achieved with the proliferation of FIPs and AIPs around the world.

SRs bring together major buyers and importers of seafood in a particular sector to work together pre-competitively to scale-up individual fishery or aquaculture improvement efforts and support better fisheries policy and management.

Through SRs, companies can 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 a different focus and different goals, depending on the unique needs of that sector.

SR industry chairs include:

- **Asian Farmed Shrimp SR:** William Davies, The Big Prawn Co.
- **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
 - **Mexican Snapper and Grouper SR:** Andre Brugger, Netuno USA
 - **US Gulf of Mexico Shrimp SR:** Derrick Nagle, Big Easy Foods



Global
Roundtable
on marine
ingredients

SFP Launches New Marine Ingredients Roundtable with IFFO

In 2021, SFP and IFFO, the Marine Ingredients Organisation, launched the new **Global Marine Ingredients Roundtable**, creating a forum for companies from the marine ingredients (fishmeal and fish oil) value chain to drive environmental and social improvements in fisheries globally. The first priority for the Roundtable is West Africa, where production of marine ingredients has grown dramatically over the last decade.

The Roundtable represents a whole value chain approach that engages a variety of users of marine ingredients, including producers of pet food, nutraceuticals, cosmetics, and other products, and key supply chain actors, including producers, processors, trade associations, and certification standards.

The Roundtable results from the recognition by SFP of the global nature of trade in fishmeal and oil. In advance of the launch, SFP phased out three existing regional reduction fisheries Supply Chain Roundtables (SRs) – the Asian Reduction Fisheries SR, the Latin American Reduction Fisheries SR, and the European Sustainable Fishmeal SR.





TARGET 75



With the success of SRs, SFP wanted to consolidate our efforts even more to create the large-scale change and momentum needed to achieve the goal of 100-percent sustainable seafood. This led to the creation and launch by SFP of Target 75 (T75).

T75 seeks to ensure that 75 percent of seafood (by volume) in 13 key sectors is either sustainable or making regular, verifiable improvements. Together, the 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.

The ideas and science behind T75 have been adopted by seafood companies and other organizations to guide their sustainability commitments and goals. What began as an NGO-led initiative has evolved into a framework that guides dialogues, policies, commitments, and progress throughout the sustainable seafood movement.





New Sector Sustainability Reports Highlight Progress Toward T75

In 2022, SFP released a series of Sector Sustainability Updates associated with the T75 sectors. Each report provides a summary on progress in the sector against the 75-percent sustainable or improving goal, along with highlights on the sources of production with the most relevant changes, recent trends in production and trade, and additional sustainability challenges.



Mahi-mahi Producers in Costa Rica, Ecuador, and Peru Commit to Improve Sustainability

In September 2021, fisher associations from Ecuador and Peru and processing plants from Ecuador, Peru, and Costa Rica agreed to implement the first-ever regional coordination mechanism for improving the sustainability of the Eastern Pacific Ocean (EPO) mahi-mahi fishery. COREMAHI (the Regional Committee of Mahi) developed a Code of Conduct as a first step toward addressing the lack of a regional management instrument for the transboundary fishery.

SFP provided technical support and coordination in developing and approving the Code, which includes 14 commitments to:

- improve monitoring and data collection in the fishery
- promote co-management for small-scale fishers
- reduce bycatch of vulnerable species and address ecosystem impacts
- combat illegal, unreported, and unregulated (IUU) fishing.

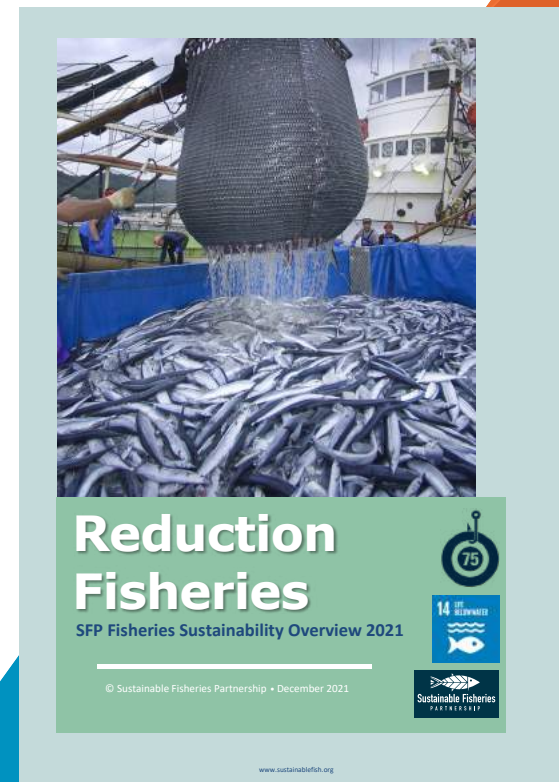
The Global Sustainable Supply Chains for Marine Commodities (GMC) project provided financial support for the project.

The Code builds on existing regional cooperation among mahi industry players, and recommends that the governments of Costa Rica, Ecuador, and Peru develop regional management agreements for the fishery. There is currently no regional fisheries management organization (RFMO) for mahi-mahi in the EPO, nor a management agreement between governments, which presents significant challenges to the regional mahi industry.

2021 Reduction Fisheries Report

The 12th edition of SFP's **annual assessment of reduction fisheries**, released in late 2021, found that overall sustainability performance in the reduction fisheries sector has continued to decrease slightly since 2018. The decrease in performance was driven primarily by a drop in scoring of NE Atlantic blue whiting. Of the total volume in fisheries analyzed for this report, 4 percent was rated very well-managed, 75 percent reasonably well-managed, and 21 percent poorly managed.

The report concluded that while a decade of industry engagement has been instrumental in supporting management improvements in key reduction fisheries, overall performance has plateaued or slipped, and significant environmental and social challenges persist in key production regions.



ADVANCING SCIENCE, DATA, AND INFORMATION FOR SUSTAINABLE SEAFOOD



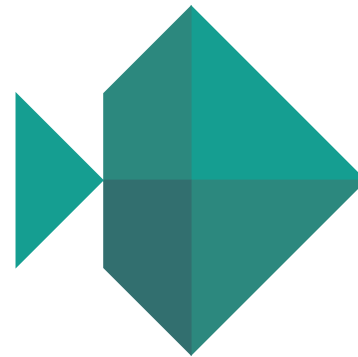
For nearly two decades, SFP has been a leader in creating tools and systems to collect, interpret, and distribute clear, scientifically based information on seafood sustainability.

To achieve sustainability goals, it is necessary to identify problems, understand solutions, monitor progress, and assess impact – to know what is working and what isn't, and adapt actions and practices.

When SFP started, this was almost impossible, because the tools to do so did not exist.

So we
created
them.





FISHSOURCE

15TH *ANNIVERSARY*

➤ SFP developed FishSource just months after the organization was formed. It is based on the simple idea that, in order for seafood companies to evaluate the sustainability of their supply and understand where improvements are needed, they need to easily access basic information about their source fisheries.

In 2007, nothing like this was available to the seafood industry. While certification programs offered voluntary, paid assessments, there was little available information about the majority of fisheries that were not part of the certification process. And where data did exist, it was often hard to get and interpret.

So SFP created FishSource, a free, scientifically based online compendium of easy-to-understand information on the sustainability of global fisheries. FishSource helps users identify the most urgent issues

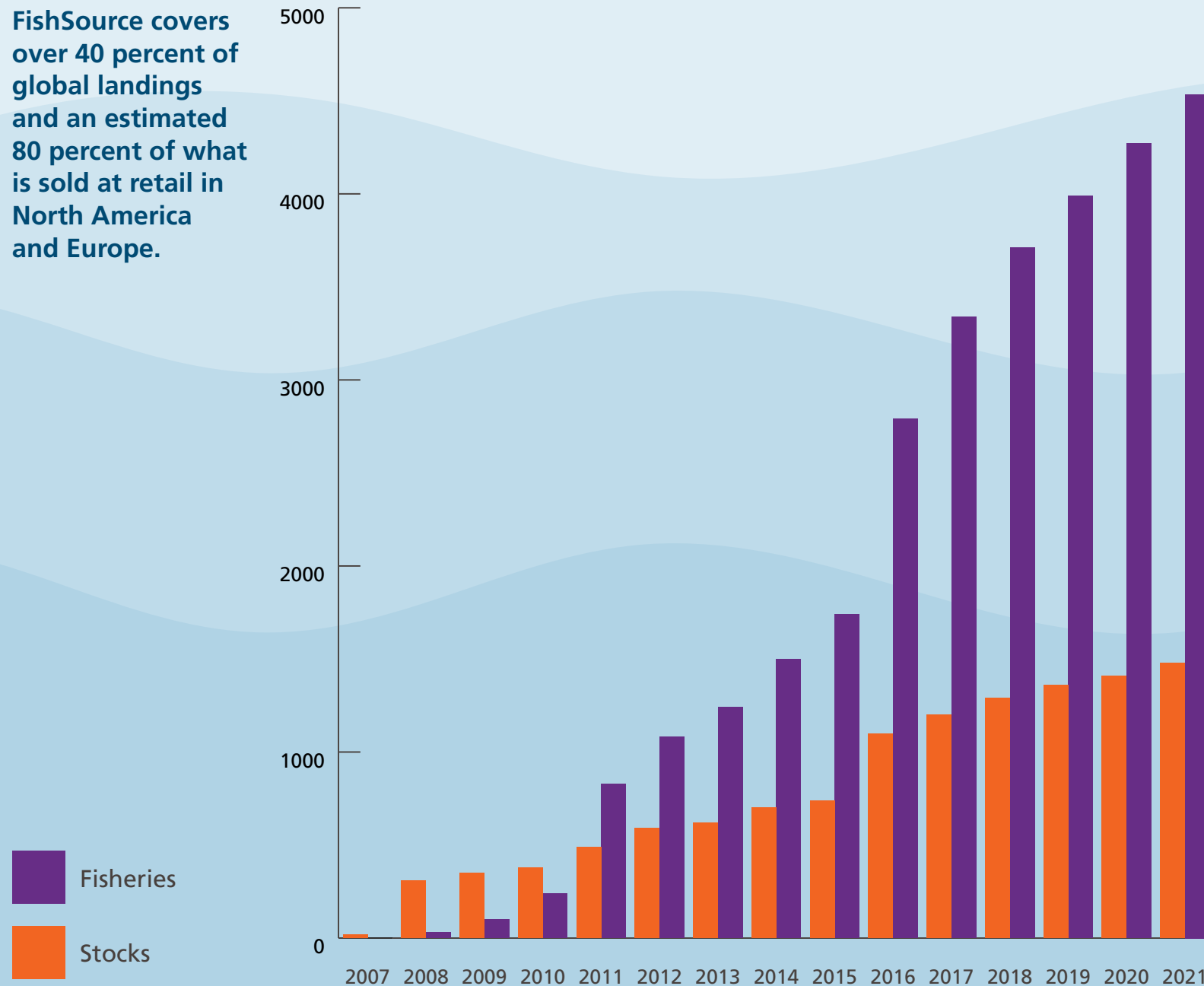
in a fishery and, importantly, offers actions that stakeholders can take to improve their fisheries of interest.

Originally, retailers did not have information on the stocks they were sourcing from and the gear being used, or if any of it was sustainable. Over the years, buyers started to realize that they needed to raise the bar on reporting and require this information from their suppliers. FishSource fulfills this need.

The FishSource Rapid Assessment Program (RAP) now also allows private, public, and nonprofit organizations to request and finance new wild fishery and aquaculture profiles that are not yet available on our site, or support the updating of existing profiles.

FishSource Fishery Profiles

FishSource covers over 40 percent of global landings and an estimated 80 percent of what is sold at retail in North America and Europe.

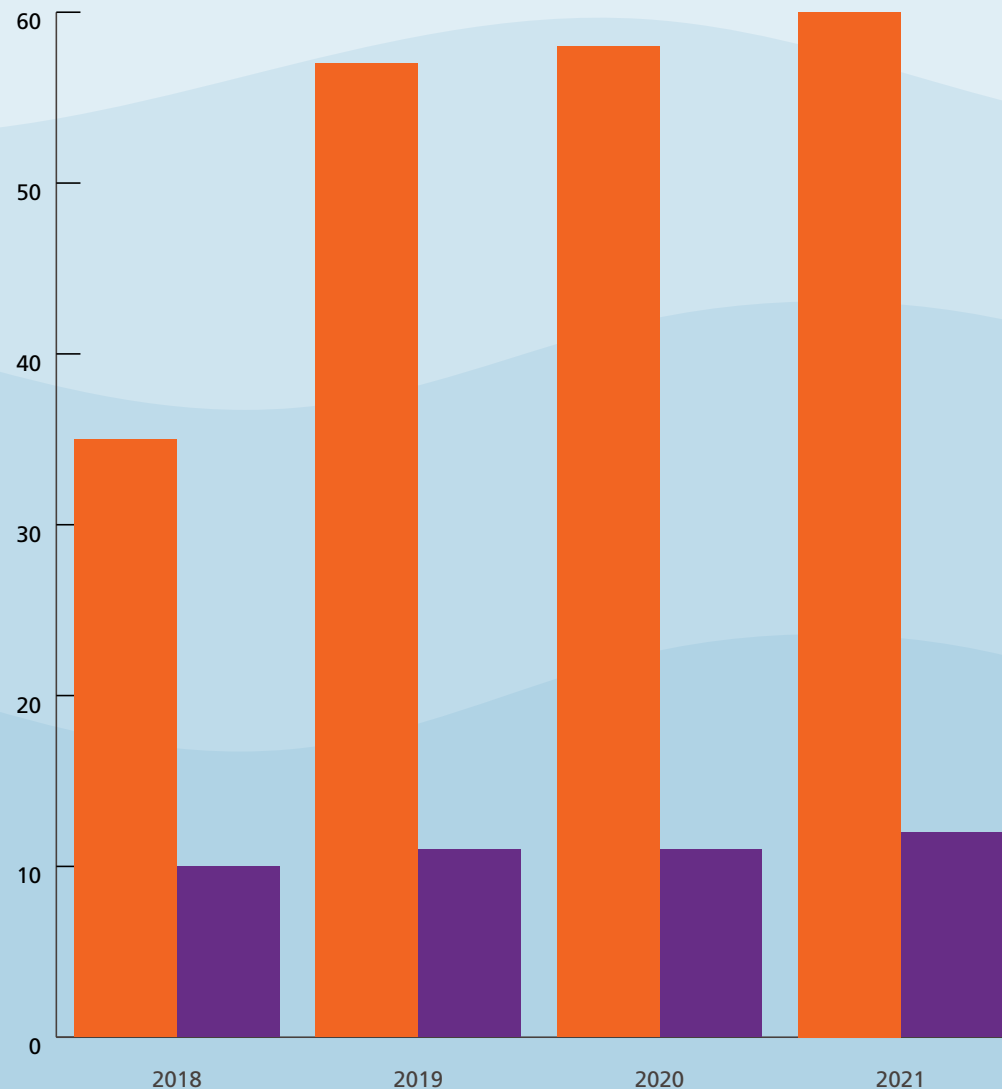


FishSource Aquaculture Profiles

FishSource Aquaculture represents at least 70 percent of production (by volume) of the salmon, shrimp, tilapia, and pangasius sectors combined.

FishSource Aquaculture profiles cover 16 percent by volume and 23 percent by value of global aquaculture production.*

**excluding aquatic plants*





15 Years of Innovation

In 2022, FishSource celebrated its 15th anniversary.

Now with more than 11,000 registered users, FishSource has grown into a vital resource for a broad range of stakeholders, including scientists and researchers, academic institutions and schools, NGOs, zoos and aquariums, governments, financial institutions, and certification bodies.

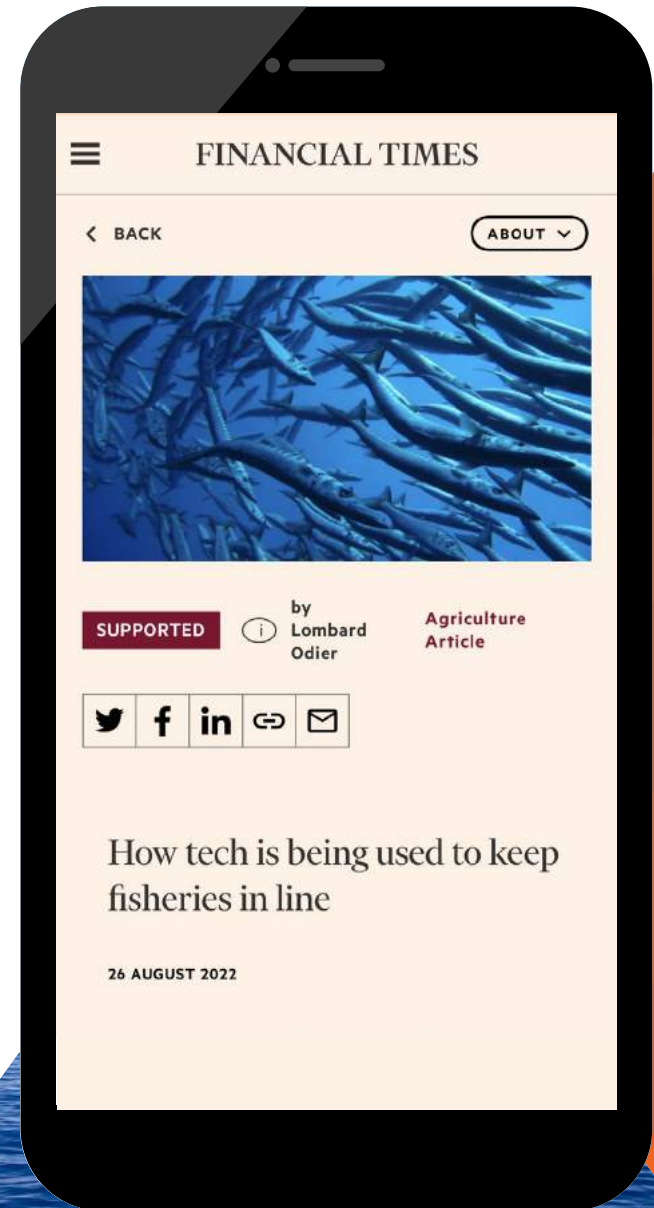
Over this time, FishSource has been at the forefront of fisheries data and science, including developing a qualitative scoring method when data is limited, a dynamic website displaying and differentiating fisheries and their overlaps, the first-ever aquaculture profiles, and a new environmental scoring methodology.

Looking to the future, FishSource is currently working on socioeconomic scoring methods to assess the security of tenure rights for fishers and co-management in small-scale fisheries. And we are looking at ways to enhance the scoring of data-limited fisheries, to address the significant number of fisheries that do not have regular stock assessments.

FishSource featured in the *Financial Times*

In 2022, FishSource was highlighted in “How tech is being used to keep fisheries in line,” a story in the *Financial Times* about using technology to improve transparency and traceability in seafood supply chains.

The story included commentary by SFP Chief Programs Officer Blake Lee-Harwood and recognized SFP for its innovation and creation of platforms to enhance fisheries monitoring.





FishSource Environmental Scores Provide Fuller Picture of Sustainability

In 2021, SFP added a new scoring methodology to FishSource to measure the environmental impact of a fishery on its ecosystem.

FishSource has been scoring stock status and the management quality of fisheries since it began. However, information on environmental impacts was only available in a narrative format.

Now, we provide a quantification of these impacts, using the familiar FishSource scale of 0 to 10, in addition to the narrative. This allows users to compare different fisheries, determine levels of impact, and decide where to focus environmental improvement efforts.

The new scoring system provides a score for four different environmental aspects:

1. Levels of bycatch
2. Impacts on endangered, threatened, and protected species
3. Impacts on habitat structure
4. Overall ecosystem impacts.

FishSource Standards Adopted by UN Food and Agriculture Organization

The [UN Food and Agriculture Organization \(FAO\)](#) is adopting the standards used in FishSource to establish unique, standardized IDs for all of the world's major fisheries, within its Global Record of Stocks and Fisheries (GRSF).

Using the FishSource standards, the FAO will publish unique, publicly available ID codes for the entire seafood industry to use. This will help ensure that data, reporting, evaluations, and discussions across industry, governments, NGOs, and others will unequivocally refer to the same stocks and fisheries.

The new IDs will fundamentally transform the seafood supply chain, allowing information to flow more freely across the industry, strengthening transparency of sourcing, improving government data collection systems, and ensuring that small-scale fisheries get an identity on equal footing to large industrial fisheries.



**Food and Agriculture
Organization of the
United Nations**



➤ After the development of FishSource, SFP realized that seafood buyers needed a straightforward, user-friendly way to track the progress of their source fisheries.

And at SFP, we wanted to identify the suppliers engaged in specific fisheries, so we could work with them to build fishery improvement projects (FIPs).

Out of these needs, SFP created Seafood Metrics. Seafood Metrics is a sophisticated tracking tool that helps companies understand where their suppliers are sourcing seafood. For example, previously a company might have known it was buying Atlantic cod, but could not differentiate further – whether that cod came from Russia, Norway, Scotland, the Baltics, the Barents Sea, or somewhere else. This made it impossible for retailers and major seafood buyers to fully evaluate the sustainability of their sourcing. To capture this information, retailers and

seafood buyers, including SFP partners and many other companies, ask their suppliers to register in the Metrics system. Every quarter, suppliers enter the volumes of seafood that they have bought from different fisheries. SFP uses this information to map the source fisheries to the relevant FishSource profile and existing FIPs, and identify issues and improvement needs.

Metrics focuses on companies in the supply chain, whom retailers *can* identify, to pinpoint the source fisheries of their products, and record and report this information through a web-based system that a fish buyer can understand.

The result is precise and actionable information that retailers and seafood buyers can incorporate into their procurement systems to assess their source fisheries and measure compliance with sustainability commitments.

Any company can use and participate in Seafood Metrics.

New Innovations at Seafood Metrics

Recent changes and improvements in Seafood Metrics create even greater power in managing sustainability.

Users can receive additional information on the sustainability of their farmed seafood sourcing through three new aquaculture indicators. These complement the existing farm-level certification status indicator by providing an assessment of how well aquaculture is being managed at the province or state level.

We also further developed our Human Rights Risk Index (HRRI) tool, to allow users to rapidly assess human rights risks in fisheries across global supply chains. The HRRI leverages information from SFP's FishSource database and other publicly available indices and reports to produce a rapid, high-level human rights risk assessment for fisheries, focusing on human trafficking, forced labor, child labor, and violations of freedom of association and collective bargaining.

The newly expanded system also now includes a program to help suppliers better serve their customers. For a modest fee, suppliers can access information to better understand how their products and sources fit into their customers' commitments and provide seafood meeting those commitments.

All suppliers still continue to receive free access to Seafood Metrics for reporting into their customers' and partners' systems.



Aquaculture Improvement Ratings

Seafood Metrics evaluates improvement needs in aquaculture production, based on FishSource's aquaculture methodology, which evaluates regulatory frameworks, producers' codes of good practice, water-quality management, disease impact and risk reduction, and marine feed ingredient management. Aquaculture production improvement is measured at the state/provincial level by species, with designations of "significant," "critical," and "specific," based on the degree of improvement needed to meaningfully improve environmental performance.



Human Rights Risk Index

Prioritize risk mitigation by identifying the highest-risk fisheries for possible human rights abuses in your supply chain.





Ocean Disclosure Project

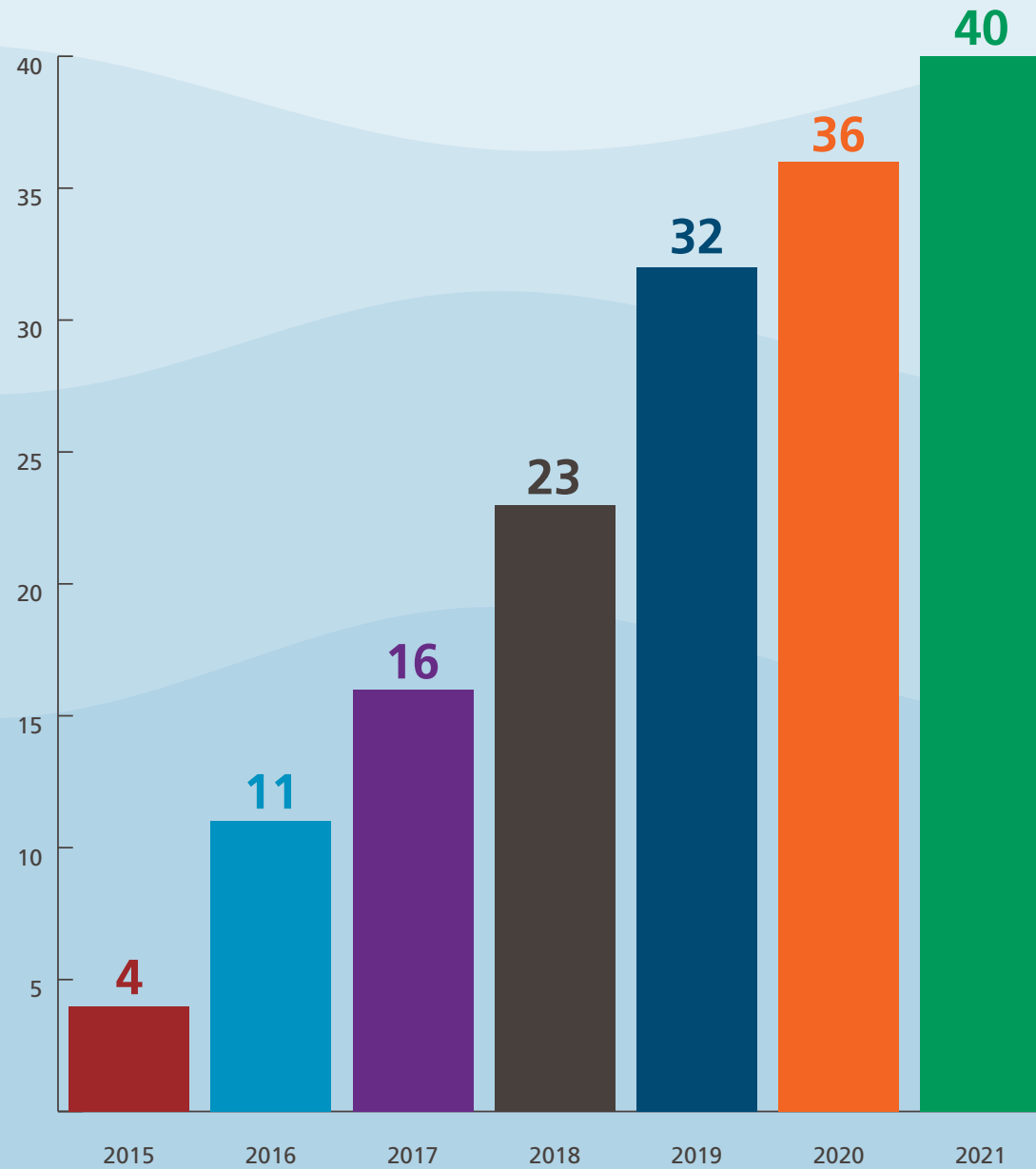
➤ Once retailers, foodservice companies, and brands had the information and ability to demonstrate sustainability through FishSource and Seafood Metrics, they wanted a way to share it publicly. They needed a simple way to communicate progress and results with shareholders and investors, customers, and other stakeholders.

To enable this transparency, SFP created the Ocean Disclosure Project (ODP) in 2015. The ODP allows companies to voluntarily disclose the sourcing of their wild-caught and farmed seafood products, key sustainability indicators (e.g., certification and improvement ratings), and environmental impacts.

Transparency drives improvements in seafood production, by making it easier to understand the sustainability of source fisheries and farms, and empowering interested parties to monitor the accuracy of corporate claims and hold businesses accountable, and make informed buying and investment decisions.

Since its inception, the ODP created the expectation that companies *should* publicly disclose their sourcing and make transparency a given part of any sustainability strategy.

Number of companies participating in the ODP



SEAFOOD



Eight Companies Join the Ocean Disclosure Project

In 2021 and the first months of 2022, eight companies began disclosing their seafood sources through the Ocean Disclosure Project, bringing total participation to over 40 companies.

Blue Apron

Greencore

Hilton Seafood

LP Foods

Sainsbury's

Stop & Shop

Thai Union

The Town Dock

Now nearly every major UK food retailer participates in the ODP or an equivalent program, covering more than 80 percent of all seafood sold in the country.







THE FUTURE OF INFORMATION:

Where do we go from here?



FishSource, Seafood Metrics, and the Ocean Disclosure Project provide the full package of information tools needed to achieve oversight of sustainability in a seafood supply chain. Collectively, they represent a natural progression of using information to advance sustainability goals.

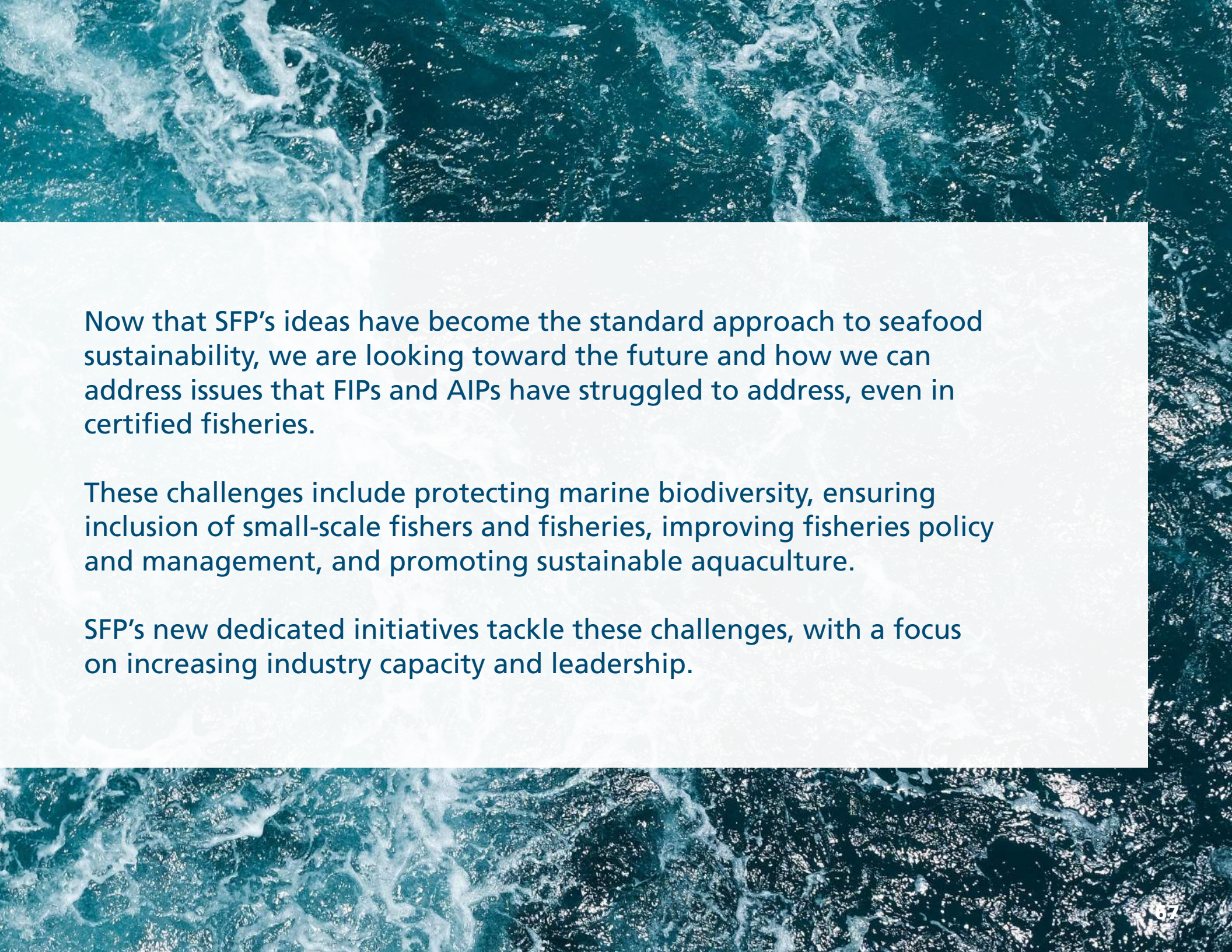
SFP's tools are designed to be dynamic and allow for continuous improvement. As a result, we can constantly improve, adapt, and iterate our approach, to increase the ability of seafood producers and buyers to advance sustainable practices.

It has become increasingly apparent that sustainability is not just about resource protection and environmental impacts. Companies now need to be concerned about illegal production, human rights and social issues, climate change, and other issues.

Looking to the future, we seek to be a “one-stop shop” of information for retailers, brands, foodservice providers, and seafood companies that are looking for comprehensive knowledge and intelligence on all these issues as they affect seafood sustainability, in order to guide their sourcing and strategy decisions.



THE NEXT PHASE OF **INNOVATION:** TACKLING THE TOUGH CHALLENGES THAT REMAIN



Now that SFP's ideas have become the standard approach to seafood sustainability, we are looking toward the future and how we can address issues that FIPs and AIPs have struggled to address, even in certified fisheries.

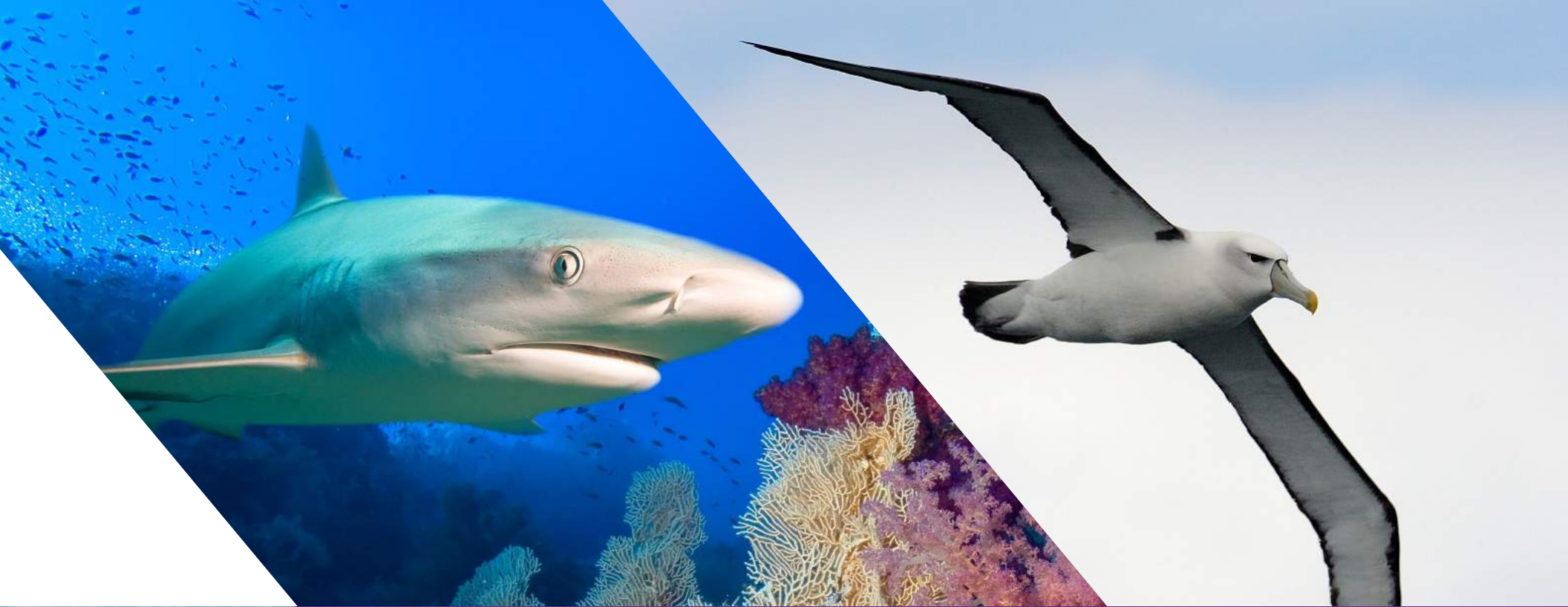
These challenges include protecting marine biodiversity, ensuring inclusion of small-scale fishers and fisheries, improving fisheries policy and management, and promoting sustainable aquaculture.

SFP's new dedicated initiatives tackle these challenges, with a focus on increasing industry capacity and leadership.



PROTECTING OCEAN WILDLIFE





Bycatch, the catch of non-target species, is one of the greatest threats to the oceans and sustainability of marine fisheries. Bycatch is also a risk for seafood retailers and their suppliers, threatening their abilities to meet sustainability commitments and address consumer concerns.

SFP's **Protecting Ocean Wildlife initiative** is organizing and mobilizing retailers and the entire seafood supply chain to reduce the catch of sharks, seabirds, marine mammals, and sea turtles, especially endangered, threatened, and protected (ETP) species.

There are many best practices and a range of new technologies available to reduce bycatch. However, there has been little adoption by the seafood supply chain. This can be attributed to limited knowledge about these solutions and a lack of a concerted push by retailers and seafood buyers on their suppliers to reduce bycatch.

There are already many existing bycatch reduction campaigns. However, almost all focus on specific species or fisheries.

Instead, as we did a decade ago to establish fishery improvement projects (FIPs), SFP will once again leverage large seafood buyers and the supply chain to generate bycatch improvements globally and at scale, across the world's fisheries.





SFP's approach is solution-based, focusing on finding the best tools and resources to address species-specific bycatch issues in different fisheries. Specifically, we:

- Make sure the supply chain understands the extent and implications of bycatch problems in their source fisheries, such as on the certification status of fisheries and corporate procurement policies
- Advance voluntary measures to achieve immediate action, while working to advance and capture improvements in management and policy
- Work with the seafood industry and fishers to develop and test technologies for different gear types and environments
- Are creating the first-ever bycatch knowledge exchange hub to promote industry collaboration and problem solving, and connect seafood and fisheries stakeholders with needed expertise, information, and funding sources.

Solve My Bycatch Problem Tool

SFP's interactive, online Solve My Bycatch Problem tool allows users to find and evaluate bycatch solutions for tuna longline fisheries, based on their relevance to specific species, effectiveness, ease of implementation, and cost.





SOLVE MY BYCATCH PROBLEM				
 PROTECTING OCEAN WILDLIFE				
Filters & Selections				
Target Fishery Tuna				
Gear Type Longlines				
Bycatch Species (All)				
Effectiveness (All)				
Ease of Implementation (All)				
Cost (All)				
 Sustainable Fisheries PARTNERSHIP				
Solution	Effectiveness	Ease of Implementation	Cost	Additional Information
Avoid Hotspots	★★	★★	\$	?
Bait Type	★★	★★★	\$	?
Best Handling/Release	★★★	★★	\$	?
Electronic Monitoring	★★★	★★	\$\$\$	?
Fireworks	×	×	×	?
Fish and Vegetable				



Bycatch Audits Identify Risks and Actions for Retailers

SFP created the [bycatch audit](#) as a first step for retailers in reducing ocean wildlife bycatch in their sourcing and supply chains.

In April 2022, SFP announced a partnership with Birdlife International and Whale and Dolphin Conservation. The partnership works with retailers, brands, and foodservice companies to identify threats to endangered, threatened, and protected (ETP) species in the fisheries that supply their seafood, through systematic “bycatch audits.” The audits provide companies with the information needed to identify and prioritize actions in their seafood supply chains to reduce bycatch.

The key findings of the audits are made publicly available on the [Ocean Disclosure Project](#), the leading seafood transparency platform.

- In 2021, following its participation in the first-ever bycatch audit, UK retailer Asda announced a new set of commitments to reduce bycatch in its supply chain. The commitments primarily focus on tuna longline fisheries and include strict requirements on catch technology and best practices for bycatch mitigation, observer coverage on fishing vessels, and treatment of sharks.
- In 2022, SFP announced the completion of its second bycatch audit, assessing the source fisheries of UK convenience retailer Co-op, one of the top retailers of seafood in the UK. In addition to identifying fisheries where there are bycatch risks, the audit also revealed broad and proactive actions by Co-op to promote healthy fisheries and protect marine biodiversity.
- Also in 2022, SFP completed the first bycatch audit of a US retailer (Publix) and of Tesco, the UK's largest retailer. Other bycatch audits are ongoing, including of a major global seafood producer and other American and British retailers.





Bycatch Solutions Open House

In March 2022, SFP hosted a Bycatch Solutions Open House at Seafood Expo North America in Boston. The event showcased the latest gear innovations and bycatch solutions for reducing bycatch interactions. This was a unique opportunity for retailers and suppliers to connect with experts and learn more about the newest technologies and initiatives.

The event featured demonstrations of best-practice methods implemented in fishery improvement projects (FIPs) and by other organizations, including:

- Hook-shielding technology by Hookpod International for pelagic longline fisheries
- Non-entangling and biodegradable fish aggregating device (FAD) and rope technology from the International Seafood Sustainability Forum (ISSF)
- Bird scaring lines and line weights from Birdlife International
- Crab and lobster traps from EdgeTech, Ashored Innovation, SMELTs, and Blue Ocean Gear that use on-demand acoustic release rope and buoy technology to eliminate static fishing lines that pose entanglement risks to whales.



Buyers from Publix Super Markets learning about ropeless crab and lobster traps from an EdgeTech representative

Publix Supports Ropeless Gear Pilot Project

In 2019, the Southern Gulf of St. Lawrence snow crab fishery in Canada had its MSC certification suspended due to increased interactions with critically endangered North Atlantic right whales.

US supermarket chain Publix, a longtime SFP partner, encouraged its crab supplier to implement a fishery improvement project (FIP). In 2020, a FIP was launched that included pilot testing of ropeless gear. Ropeless fishing technologies offer a solution to the whale entanglement problem by removing buoy lines from the water column, except when gear is actively retrieved.

Ropeless gear is the only gear type that can be used for fishing in otherwise closed areas, generating interest and providing a strong incentive for fishers to test the gear. During the 2022 fishing season, 24 vessels piloted the gear, and for the first time, Publix was able to source a portion of its snow crab from vessels using ropeless gear.

Participants are also working with fishery managers to develop a standardized method to document and collect data from the pilot efforts.



Aldi Supports Use of Hookpods to Reduce Seabird Bycatch

SFP and longtime partner supermarket chain Aldi US are undertaking a project with Hookpod International to demonstrate the effectiveness of its technology to reduce seabird bycatch and improve market access for vessels using the gear.

Hookpods use a shielding device to cover fishing hooks to a depth out of the reach of seabirds. The project is equipping longline tuna vessels operating in the western and central Pacific Ocean with Hookpods, as part of a fishery improvement project (FIP) in the region.







SUPPORTING SMALL-SCALE FISHERIES

Small-scale fishers and co-management

About 40 percent of global seafood production comes from small-scale fisheries. These fisheries directly employ more than 110 million people, representing 90 percent of the global workforce in capture fisheries. And, around the world, a total of nearly 500 million people rely at least partially on small-scale fisheries for their livelihoods.

Yet, small-scale and artisanal fisheries have been largely left behind in the sustainable seafood movement. The market strategies and tools that have led to improvements in industrialized fisheries and their supply chains cannot effectively address the problems faced by small-scale fisheries.



The unique challenges of small-scale fisheries

Small-scale fisheries, particularly in the Global South, face a complex array of problems, including:

- Governments face shortages of resources and human capital, hindering their ability to provide adequate science; management; and monitoring, control, and surveillance (MCS) services.
- Fishers have little political capital and are institutionally marginalized, lacking secure tenure rights and opportunities to participate in decision making.
- Governance systems may be undermined by corruption and a lack of transparency.
- Fishing communities suffer from widespread vulnerability that can lead to poverty and debt.

A new approach to sustainable seafood

SFP's **Supporting Small-Scale Fisheries initiative** focuses on building the enabling conditions for positive change and fairer distribution of benefits, through four key strategies:

Support artisanal and small-scale fishers in acquiring secure tenure rights. Without formal recognition under law, fishers remain institutionally marginalized—making them unable to access health care, pension schemes, and other benefits, or participate as full partners in decision-making. SFP works with local associations and communities to support fishers in navigating the process of securing the appropriate licenses and permits.

Improve the organizational and leadership skills of artisanal and small-scale fishers. SFP helps fishers get organized at scale, improve their leadership skills, and create peer-to-peer learning.



Fisheries sustainability is the result of collective action. Most commercial fish stocks transcend the boundaries of individual communities, provinces, and states. A single community or cooperative alone does not have the bargaining capacity to attract better prices for themselves or improve the stock health of a fishery.

Mobilize all levels of the supply chain to support collaborative management (co-management)

between governments and fishers. SFP promotes co-management at all decision-making levels in the governance system, and ensures that fishers have a voice in decision making and engage at the appropriate scale to achieve policy change.

Develop the necessary tools for fishers and fisheries managers to implement sustainability practices.

The cost of fisheries science and management can be prohibitive. To make effective management accessible, SFP works with stakeholders to develop simple-to-use tools such as fisher-led data-collection programs, apps to facilitate fisher engagement in surveillance and reporting of IUU fishing, economic tools to guide fisheries management, and capacity building for research institutions to assess data-deficient fisheries.

The traditional sustainable seafood model relies on market forces and the top of the supply chain as the drivers of change and improvement, almost in isolation. However, this approach is relatively unequipped to address the specific obstacles to sustainability in small-scale fisheries. Consequently, SFP is now adapting the model to better reflect the realities of small-scale fisheries, including incorporating the measures above into relevant FIPs.

SFP's approach to small-scale fisheries is the first that works along entire supply chains. This includes fishers and processors in producing countries, importers and distributors, and retailers in end markets. In addition, our approach includes an increased focus on domestic and regional markets in fishing countries. This enables us to attain a comprehensive understanding of the challenges in the supply chain for small-scale fisheries, and address specific problems at the relevant levels of the supply chain.



Mobilizing Small-Scale Blue Swimming Crab Fishers in Indonesia

SFP supported the creation of the Indonesian BSC Fishers Communication Forum (Forkom Nelangsa) to provide a mechanism for blue swimming crab (BSC) fishers in Indonesia to share information and participate in national-level decision-making processes for BSC management.

The Forum, formally launched in May 2021, was created to address the lack of formal fisher representation in national decision-making processes in Indonesia, and allow fishers to make their voices heard and actively participate in government and industry efforts to develop sustainable fisheries management.

In August 2021, the Forum for the first time contributed as a full stakeholder in a national fisheries policy review with the Indonesian Ministry of Marine Affairs and Fisheries (MMAF). Members of the Forum were recognized by the government as key stakeholders and took part in the review of the new BSC Fishery Management Plan (FMP), to replace the current one that expired at the end of 2021.

Forum members provided input on a variety of socioeconomic and environmental issues. The results of the review will guide management of the BSC fishery and be critical to its long-term sustainability. Including fishers in the review process is an important shift toward co-management approaches for the fishery, and demonstrates the value and importance of involving fishers in decision making.

Supporting Vessel Formalization in Peru

Peru produces 48 percent of global jumbo flying squid landings – the largest invertebrate fishery in the world – and more than one-third of global mahi-mahi landings. Artisanal fishers are responsible for most of this production, but the majority of these fishers are not formally recognized by law and are overlooked in national fisheries management.

In addition, failure to manage this fleet could risk Peruvian products being classified as illegal, unreported, and unregulated (IUU) in destination markets that have sustainability requirements.

Formalization includes three sequential steps:

- 1) obtaining a vessel license
- 2) obtaining a health permit
- 3) receiving the formal fishing permit granted by the central fisheries authorities.

To provide resources and support for fishers navigating this process, SFP created a website, pescaformal.pe, in conjunction with the Peruvian Ministry of Production (PRODUCE) and local NGO Sociedad Peruana del Derecho Ambiental (SPDA).

Since 2021, more than 3,400 artisanal vessels have been undergoing the process of formalization in Peru. By April 2022, 72 percent had received their vessel licenses and the percentage of vessels with formal fishing permits increased from 2 percent to 20 percent.





Marine Policy Paper Highlights Link Between Co-management and Equitable Distribution of Benefits

SFP's Fisheries Team published a [research paper](#) in the journal *Marine Policy* on the economics of Jumbo Flying Squid (JFS) fisheries. The paper finds that a lack of formal recognition of Peruvian artisanal squid fisheries leads to a reduction in benefits compared to neighboring JFS fishers in Chile.

The study shows a direct link between institutional marginalization of fishers in Peru (i.e., lack of secure tenure rights, weak organizational development, absence of co-management mechanisms) and high price elasticity, demonstrated by comparing the sale prices and export prices in Chile and Peru.

The results presented in this paper support SFP's focus on co-management in small-scale fisheries as a way to enable better bargaining power by the catch sector and build the enabling conditions for fairer distribution of benefits in fisheries.

Better Seafood Philippines

SFP supported the creation of **Better Seafood Philippines (BSP)**, which was publicly launched in November 2021. Building on the USAID Fish Right program, BSP promotes transparent and responsible sourcing practices in Philippine seafood supply chains, and consumer choices to make seafood production, trading, and consumption more responsible.

BSP features local, responsibly sourced seafood and highlights best practices by industry change drivers. This is a key program supporting the fishing industry and the Philippines in meeting the goals of the UN 2030 Agenda for Sustainable Development.





Filling Knowledge Gaps Through Private and Public Alliances in the Eastern Pacific Ocean

The Eastern Pacific Ocean (EPO) is one of the world's most productive mahi-mahi regions. Most production comes from small-scale fisheries that represent a crucial source of income and livelihoods for fishing communities. However, limited knowledge about the mahi stock leads to inconsistent management measures.

At the 12th meeting of the IATTC Scientific Advisory Committee (SAC) in 2019, the Ecuadorian and Peruvian delegations presented a regional scientific plan to improve knowledge of the mahi stock structure and status in the EPO. This plan was developed by the Public Research Institute of Aquaculture and Fisheries (IPIAP) and the Institute of Peruvian Sea (IMARPE), with the support of SFP and the Regional Committee of Producers and Processors of Mahi (COREMAHI.)

SFP supported early implementation of three of the five projects in the regional plan:

- The first phase of a **genomic study** to identify genetic differences of mahi mahi populations in the EPO
- A **stock assessment** conducted by IPIAP and IMARPE that was presented to the IATTC in April 2022
- A pilot project for **tagging mahi-mahi in the EPO** with both satellite and conventional tags.

SFP coordinated participation and capacity building of actors from multiple sectors, including public research institutions, the supply chain, and fishers. Artisanal fishers also had a core role, collecting data and and extracting samples for the genomic study and tagging project.

The work discovered that the mahi stock is healthy and found genetic differences within the EPO. These results are an important first step and key input in the process of designing regional management measures for mahi-mahi and increasing the involvement of artisanal fishers in decision making for management of the fishery.

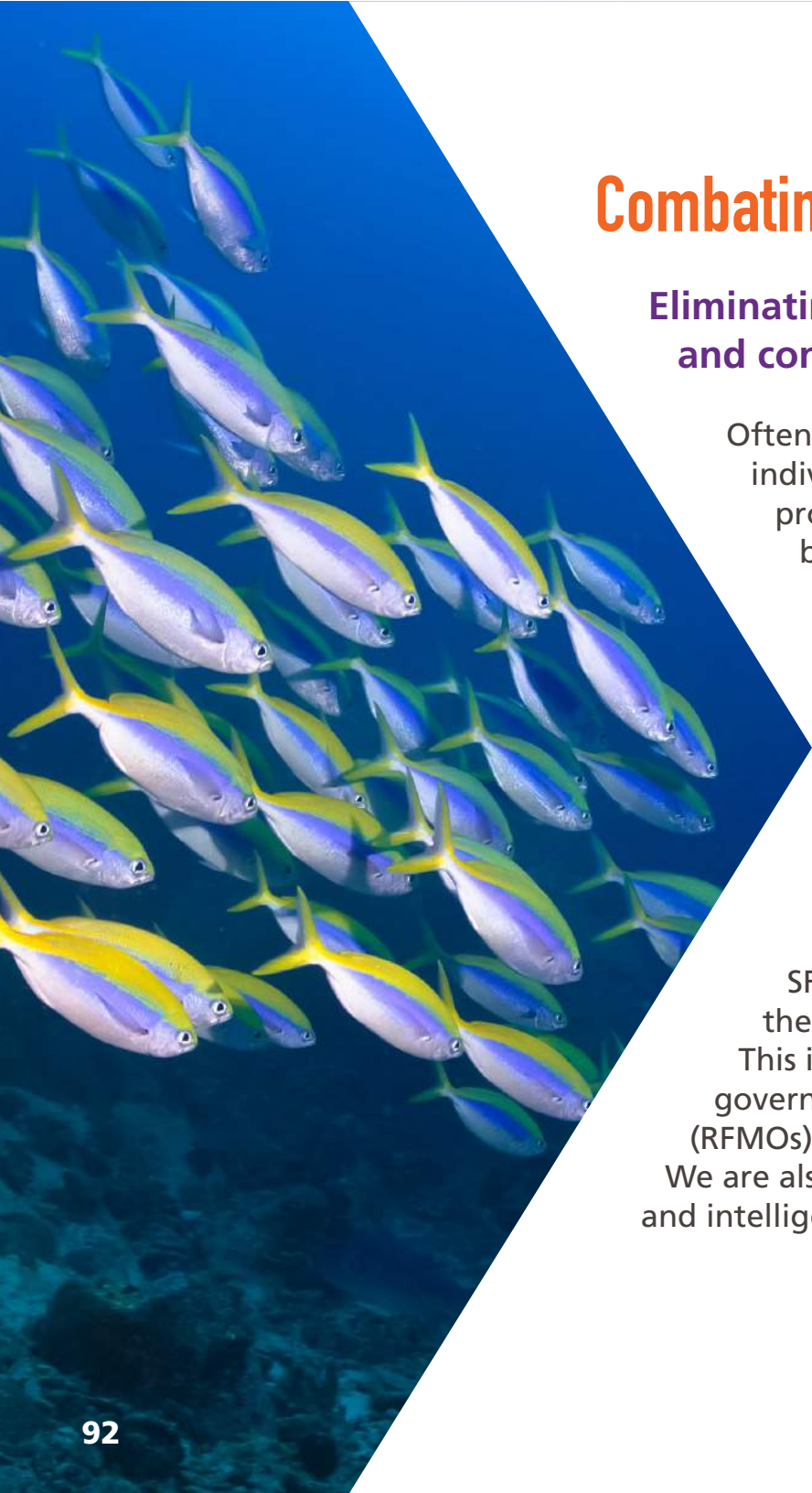


The background of the slide is a photograph of a port scene. On the left, a large blue ship with a red hull is docked. In the foreground, a yellow crane is visible. The right side of the slide is partially obscured by a white diagonal shape that contains the title and text.

IMPROVING FISHERIES MANAGEMENT

SFP's **Improving Fisheries Management initiative** engages and mobilizes the seafood industry and other stakeholders to strengthen national and regional fisheries and governance. Our current focus is on addressing and eliminating illegal, unreported, and unregulated (IUU) fishing in key industrial fisheries, notably squid, tuna, and small pelagics.





Combating IUU Fishing

Eliminating IUU fishing is necessary to ensure a reliable and continued supply of seafood.

Often the focus of efforts to eliminate IUU fishing is on stopping individual vessels from fishing illegally and/or preventing illegal products from entering markets. However, this does not address broader impacts on fish stocks or the underlying issues and enabling conditions perpetuating IUU fishing.

It is important for individual companies to continue to source from vessels that are operating responsibly. However, it is vital to determine if there is illegal or unregulated fishing within a source fish stock. Even if some vessels are operating responsibly, without sufficient monitoring and regulation any IUU fishing could eventually lead to fishery depletion (or collapse) and unstable availability of product.

SFP looks at the big picture of IUU fishing and brings together the full range of stakeholders needed to put a stop to this practice. This includes organizing the seafood supply chain to work with governments and regional fisheries management organizations (RFMOs) on improved fisheries policy, monitoring, and enforcement. We are also encouraging industry to more actively share data, resources, and intelligence to help fight IUU fishing.

What is IUU Fishing?

Illegal – *Fishing against the law*

- Fishing in exclusive economic zone (EEZ) waters in violation of that country's laws
- Fishing in international waters in violation of the laws of the vessel's flag country or international agreements.

Unreported – *Fishing activity or landings not reported*

- Fishing activities not reported or misreported to national authorities or regional fisheries management organizations (RFMOs), in violation of laws and regulations
- Can occur in EEZs or international waters.

Unregulated – *Management measures not in place*

- Fishing activities in areas or of fish stocks where there are no applicable conservation or management measures
- Can be by vessels without nationality, or by vessels flying the flag of a country that is not a party to international conventions or an RFMO.





Squid Buyers and Producers Take Action to Combat IUU Fishing

In July 2021, a group of squid buyers and importers from the Global Squid Supply Chain Roundtable (SR) formed the Squid IUU Prevention Group, to work together pre-competitively to drive improvement efforts in squid fisheries practices, management, and policy. As importers and distributors of processed squid products, the Working Group members seek to prohibit IUU-sourced squid products and stop labor and human rights abuses in their supply chains.

By early 2022, 14 squid producers from the United States, Spain, Canada, and the United Kingdom had **committed** to adopt new purchasing policies or strengthen current ones to incentivize sourcing from legal producers and ban imports of IUU squid products.

The companies also committed to establish a governance and funding mechanism for the group, adopt a plan to address social responsibility issues, and engage regulators and other actors to commit resources to improve squid management and eliminate IUU fishing. The companies are also recruiting other squid producers and suppliers worldwide to join their effort to stop IUU fishing.

By 2023, all members of the Squid IUU Prevention Group are expected to start adapting their purchasing requirements based on the criteria and commitments outlined in the **Public Statement on IUU Fishing**, signed by the group in 2022.

Mexican Shrimp SR Addresses Illegal Shrimp Fishing in Gulf of California

In May 2021, SFP created a new Mexican Shrimp Supply Chain Roundtable (SR) in response to information about extensive laundering of illegal gillnet-caught shrimp (upper Gulf of California) to circumvent US embargoes and maintain access to the US market.

The new SR provides a platform for US importers of Mexican Pacific wild shrimp to implement control documents, a market-based tool to improve compliance with existing Mexican laws that regulate shrimp fishing. A control document is a letter of warranty by a supplier, certifying that the products sold, to the best of its knowledge, are legally caught and conform fully to all applicable national and international laws.

The Mexican Pacific shrimp fisheries contribute only about 1 percent of global production in the sector. However, they are an important source for the United States, one of the major markets for large shrimp. Poor compliance with existing regulations is the most significant sustainability issue facing the Mexican shrimp industry today.

The new SR has stringent requirements for membership, including implementation of control documents, verification of regulatory compliance for 100 percent of the product purchased or produced by the importer, audits to verify proper gear configurations covering a minimum of 25 percent of vessels per year, and full disclosure of results to SFP.





Argentine Fishing Vessel Owners and Major Squid Buyers Launch Squid FIP

SFP and the **Argentine Chamber of Jigger Fishing Vessels Shipowners (CAPA)** launched a new fishery improvement project (FIP) to improve the sustainability of the Argentine shortfin squid fishery, the second-largest squid fishery in the world. The **Argentina shortfin squid - jig FIP** will work on fishery improvements in Argentina's exclusive economic zone (EEZ) and eventually seek Marine Stewardship Council (MSC) certification. CAPA's members include 32 companies, representing 66 fishing vessels and 90 percent of Argentina's shortfin squid catch.

In April 2022, CAPA and a group of six international squid buyers – all members of SFP's **Global Squid Supply Chain Roundtable** – signed a **joint MoU** recognizing the support provided by the six companies during the creation of the FIP and allowing them to become full FIP members in the first year, in an effort to bring more sustainable products to European and US retailers.





Sustainable Fisheries
PARTNERSHIP

MOU signing ceremony
Argentine Shortfin Squid Fisheries
Cámara de Armadores
de Poteros Argentinos C.A.P.A.
PanaPesca
LUND'S
FISHERIES

An aerial photograph of a coastal region. In the background, there are large, rugged mountains with some vegetation. A river flows through the middle ground, with several rectangular aquaculture ponds situated along its banks. The foreground shows a mix of rocky terrain, greenery, and some buildings, including a prominent one with a red roof. A large blue diagonal banner covers the right side of the image, containing the title text.

PROMOTING SUSTAINABLE AQUACULTURE



Today, more than half of the world's seafood, by volume, is farmed, and aquaculture production has grown more than 500 percent in the past three decades. The aquaculture sector supports millions of people, both directly and indirectly, including many small-scale fish farmers in developing countries. >>>

Aquaculture also has a relatively low carbon footprint, making it an important source of animal protein in relation to climate change. But, despite this benefit, poorly managed aquaculture can lead to habitat degradation, reduced water quality, and catastrophic disease outbreaks.

SFP is committed to ensuring that this vital source of protein and livelihood for the world's population is developed sustainably. SFP's **Promoting Sustainable Aquaculture initiative** is focused on understanding and addressing the potential risks of aquaculture and innovating new approaches to better integrate aquaculture production into surrounding landscapes.

While some environmental organizations are opposed to fish farming and will not work with the aquaculture industry, SFP acknowledges the challenges of the industry while also recognizing that it is vital to feed a growing planet.

> Landscape-based aquaculture

SFP's strategy looks beyond the farm level to focus at the broader landscape level.

Traditional approaches to reducing environmental harm in aquaculture have focused on individual farms, typically via certification schemes, national standards, and codes of good practice for farmers. But these approaches do not address the cumulative impacts and shared risks associated with aquaculture. For example, when multiple farms are operating on the same water body, water quality can be degraded and disease can spread easily from farm to farm.

> Promoting habitat regeneration

SFP's key focus is habitat regeneration, which involves not just restoration, but achieving fully functioning ecosystems and valuing the services they provide, such as coastal protection, carbon capture, nurseries for wild fish, and diverse livelihood options for local communities.

To understand how the development and growth of aquaculture is affecting coastal habitats such as mangrove forests, we are now collecting actionable information to support industry activity to protect and restore these important natural resources.

> A pathway for sustainability

The aquaculture industry and related supply chains are important partners in achieving our goals. SFP provides actionable recommendations for improvement and pushes seafood companies to think differently about their sourcing by developing the tools and concepts they need to improve sustainability across whole landscapes.

SFP is working with the seafood industry and fish farmers to build a pathway toward greater sustainability and certification through “reimagined” aquaculture improvement projects (AIPs).

➤ AQUACULTURE IMPROVEMENT PROJECTS

An AIP, as defined by SFP, involves multiple farms working together with industry and supply chain stakeholders to address common environmental risks within a shared resource, typically a waterbody or water catchment.

The concept of an AIP has existed for many years. However, there has not been any clear definition of an AIP, or what constitutes sustainable aquaculture.



SFP innovated a model of AIPs to facilitate the management framework and performance of multiple farms. This serves as a complement to certification, which focuses on individual farms.

Even where farms are already certified, AIPs offer a way to more broadly address issues such as water quality and disease, by considering the aquaculture industry and policy in the overall area, and engaging producers to

help raise their collective environmental performance.

AIPs are an important tool for improving aquaculture management across a whole region and, by demonstrating success, can advance policy changes at the provincial, regional, and national levels.



AIPs offer a way to more broadly address issues such as water quality and disease, by considering the aquaculture industry and policy in the overall area, and engaging producers to help raise their collective environmental performance.

➤ FISHSOURCE AQUACULTURE PROFILES

As AIPs provide a pathway toward sustainability, FishSource scores help measure progress on that journey.

The FishSource profiles monitor the adoption of the landscape-level approach across aquaculture areas, how far the area has progressed toward sustainability, and if the management strategy considers cumulative impacts.

FishSource profiles:

- **Assess** the environmental management measures in place at a provincial/state level
- **Pinpoint** weaknesses in management and implementation
- **Gauge** how well farmers and other stakeholders are working together
- **Provide** actionable recommendations for improvement.



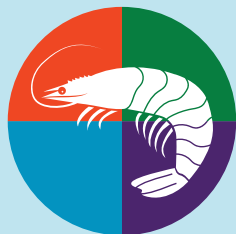
For local actors interested in creating an AIP, individual profiles can identify the challenges in a certain region or province and where to focus improvement efforts. For farms and stakeholders already involved in an AIP, a FishSource profile is a way to publicly demonstrate how their practices translate into improved environmental performance, and if they have been successful in influencing policy.

FishSource uses the province or state level for analysis as the best available geographic unit to identify and assess cumulative impacts. In many countries, performance and management may differ from province to province, and it is important for companies to be able to know which province their product is sourced from, not just the country.



New FishSource Aquaculture Profiles

There are now 61 FishSource aquaculture profiles. These profiles are updated every two years to capture the latest management approaches in these regions. This year, three new aquaculture profiles were added, covering the main seabass and sea bream provinces in Greece (1) and Turkey (2). These profiles are an expansion to new locations and species in Europe, in addition to those already published for salmon.



SUPPLY CHAIN ROUNDTABLE

Asian Farmed Shrimp

Formalization of Asian Farmed Shrimp Supply Chain Roundtable

In 2022, SFP launched our revamped Asian Farmed Shrimp Supply Chain Roundtable (SR) with a new logo, new participants, and a new mandate.

The SR includes more than 10 participating companies, who are working to develop a roadmap for how the industry can support the uptake of AIPs throughout the aquaculture sector. The participants assembled a budget for this work, and companies are contributing financially to the running of the SR and the development of the roadmap.

The SR is an important channel of communication between the industry and governments. In past years, the SR regularly engaged with the Thai Department of Fisheries and will continue to do so to ensure effective change at the policy level.

The SR is also focused on raising awareness and understanding about the landscape management approach for aquaculture, through social media (on Twitter [@AsianShrimpSR](#)) and a webinar training series. The webinars will provide industry participants with what they need to know to start an AIP and how to ensure that shrimp produced in an AIP can be effectively traced through industry supply chains.

Aquaculture Technology Spotlight highlights data-driven aquaculture tools

SFP's [Aquaculture Technology Spotlight](#) report highlighted the growing number of tools that bring fish farmers and their data together to monitor the cumulative impacts and shared risks associated with aquaculture beyond the traditional farm scale. These tools can also be used by producer organizations, supply chain stakeholders, and government agencies to support area-based aquaculture regulation and management.





A new sustainability pathway for aquaculture producers

SFP is partnering with the Aquaculture Stewardship Council (ASC) and Monterey Bay Aquarium (MBAq) Seafood Watch to streamline the path to sustainability for aquaculture producers in Indonesia. This is part of the ISEAL Innovations Fund “Integration of seafood certification and jurisdictional assurance models” project supported by the Swiss State Secretariat for Economic Affairs (SECO).

The vast majority of aquaculture is uncertified, and there is no standard or assurance for how uncertified products are produced. The project seeks to create a standardized way to measure the progress and performance of farmers who are not yet certified by developing an improvement project (AIP) model through the ASC Improver Programme (ASC IP).

Fishery improvement projects (FIPs) are today readily accepted as part of retailers’ sourcing strategies. However, with aquaculture, many retailers specify a preference for only certified products, with no allowance for producers who are actively participating in improvement efforts. Yet, it can take time for improvements to be realized. And creating market opportunities gives farmers incentives to implement improvements.

The three organizations are developing a process based on verification of on-the-ground improvements for producers participating in AIPs. This will provide a level of assurance to buyers that the product is being produced responsibly.

In addition, an initial data-mapping exercise identified opportunities for data sharing by the three partner organizations. Information from ASC and its public shrimp farm audits has now been consolidated and shared with SFP and MBAq to inform their assessments. Information from SFP and Seafood Watch (MBAq) assessments will also be used as external third-party risk indicators under the ASC IP.

Two AIPs, both in Indonesia, are now registered on the AIP Directory and are in the process of developing their improvement plans. These projects are supported by the ISEAL Innovations Fund “Integration of seafood certification and jurisdictional assurance models” project.

The **AIP2BP ASTIN – East Java** and the **AIP2ASC Astin – East Java** AIPs together account for almost 3,000 tonnes of shrimp annually. Both are focused on improving management practices, including the management of shared water resources. The AIP2ASC project also has the goal of achieving ASC certification for its member farms.





CLIMATE CHANGE: THE NEXT CHALLENGE

By Blake-Lee Harwood, chief programs officer



Climate change represents a serious threat to ocean conservation, the well-being of fishers, and the economic success of the seafood industry.

Changes in the temperature and acidity of seawater have profound implications on ocean environments, while sea-level rise and the increased frequency of extreme weather events present huge challenges to fishing operations. Stocks of commercially valuable fish are likely to migrate to different geographies and jurisdictions, and some existing marine habitats will be destroyed, while other new habitats will be created.

These are major challenges to building a sustainable seafood industry and to the future work of SFP.

SFP is already doing a great deal through our work in supporting sustainable fishing. Well-managed fisheries are more resilient to the effects of climate change and are likely more carbon-efficient.

Our work in promoting aquaculture and the protection and restoration of coastal and wetland biodiversity – particularly mangroves – is an important contribution to the global effort to increase supplies of low-carbon protein while protecting “blue carbon” in vulnerable areas.

However, even though mainstream efforts to build sustainable fisheries are helping the overall effort to mitigate and adapt to climate change, there is still far more to be done.



The fishing industry itself is not a major source of climate changing gasses compared to other industries – certainly less than 2 percent of all human-related emissions – but it still needs to minimize its impacts. Fishing boats must eventually adopt sustainable propulsion systems, while transport and processing logistics will need to maximize efficiency.

Seafood – and particularly aquaculture – also has the potential to significantly reduce the climate impact of our food systems. Sustainably managed fish farming could produce huge amounts of nutritious food with a far lower carbon footprint than most meat production, while using only small amounts of land.

There is a huge potential for exciting innovations in multi-trophic aquaculture systems that integrate fish farming with seaweed growing and marine mollusc production. Such systems could be integrated into offshore renewable energy facilities like wind farms, which may already be off-limits to wild fishing. If sustainably produced seafood can displace carbon-intensive meat production, it will genuinely have become a “climate solution.”

Finally, seafood is one of the most internationally traded food commodities in the world, and there are numerous opportunities to make the trade less impactful. For instance, a substantial proportion of farmed salmon is air-freighted from producing countries to export markets, generating a huge carbon footprint, even though less-polluting means of transport via ship already exist. Further technological innovation will make alternatives to air freight even more attractive.

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 thought leaders.

Contact us at info@sustainablefish.org. We look forward to hearing from you.

SFP PARTNERS

This list includes all SFP partners as of August 1, 2022.

Aldi Nord

Aldi South

Asda

Auchan Retail Spain

Beaver Street Fisheries

Congalsa

Cooperative Food UK

Disney Parks, Experiences, and Products

Fish is Life

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

- Auchan released a new sustainability commitment, including a purchasing preference for seafood from FIPs rated A-C through SFP's FIP Evaluation Program; support for SFP's Supply Chain Roundtables; and mapping of its aquaculture sources.
- Co-op committed to prioritize actions to protect endangered, threatened, and protected (ETP) ocean wildlife species in its source fisheries, based on a bycatch audit that found bycatch risks and also identified broad and proactive actions by the company to promote healthy fisheries and protect marine biodiversity.
- Disney Parks, Experiences and Products committed to serve 100-percent environmentally responsible seafood by 2022, including products that are actively engaged in fishery improvement projects (FIPs).
- Sea Pact, a group of North American seafood companies working together to drive improvements in the seafood supply chain, formally adopted SFP's Target 75 initiative as a key strategy.
- Seattle Fish Co. released a new 2021-2025 Sustainability Commitment, including a commitment to actively support fishery and aquaculture improvement projects (FIPs and AIPs).

NEW PARTNERSHIP WITH THAI UNION

In 2022, SFP announced a new partnership with Thai Union Group, the world's third-largest seafood company, including global brands like Red Lobster and Chicken of the Sea.

In the partnership, Thai Union requires its suppliers to participate in fishery improvement projects (FIPs) and Supply Chain Roundtables (SRs) and will actively drive change in its seafood supply chain through other initiatives. Thai Union first began participating in the Ocean Disclosure Project in early 2021, to demonstrate a commitment to transparency as part of its SeaChange program.

2021 DONORS AND FUNDERS

Aquaculture Stewardship Council/ISEAL Innovations Fund
BAND Foundation
Binnacle Fund of the Tides Foundation
Margaret A. Cargill Philanthropies
Certification and Ratings Collaboration
John Ellerman Foundation
The Global Environment Facility (GEF)
Multiplier
Oak Foundation
Oceans 5
The David and Lucile Packard Foundation
United Nations Development Programme (UNDP)
United Nations Food and Agriculture Organization (FAO)
United States Agency for International Development (USAID)
University of Rhode Island Coastal Resources Center
Walmart Foundation
Walton Family Foundation
The Waterloo Foundation

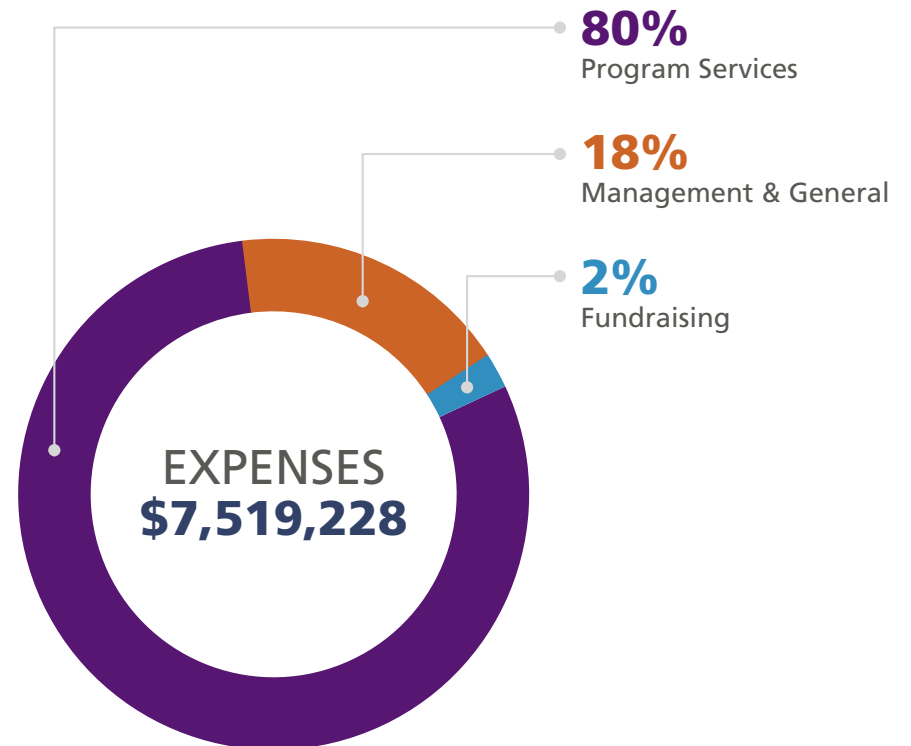
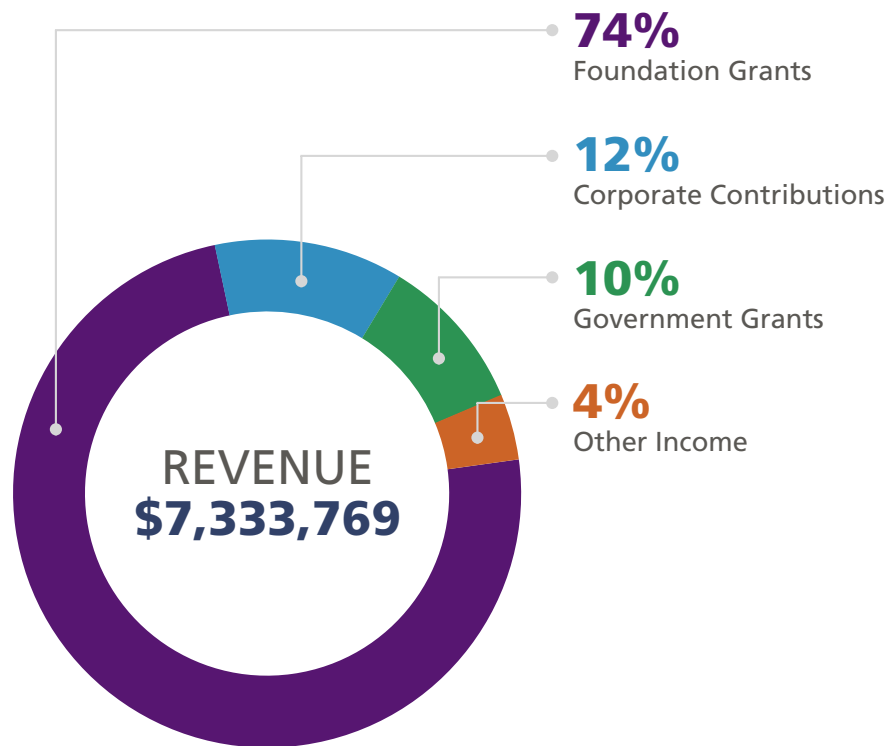


BECOME AN SFP SUPPORTER >>>

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.

FINANCIALS 2021



STATEMENT OF ACTIVITIES

Year Ended
December 31, 2021

SUPPORT AND REVENUE	WITHOUT DONOR RESTRICTIONS	WITH DONOR RESTRICTIONS	TOTAL
Foundation and government grants	\$ -	\$ 6,124,847	\$ 6,124,847
Corporate grants and sponsorships	668,502	252,259	920,761
Contracts	200,954	-	200,954
Contributed services	85,339	-	85,339
Other contributions	1,195	-	1,195
Registration fees and other income	673	-	673
Net assets released from restrictions			
Expiration of time restrictions	1,815,269	(1,815,269)	-
Satisfaction of purpose restrictions	5,136,298	(5,136,298)	-
Total support and revenue	7,908,230	(574,461)	7,333,769

EXPENSES

Program services	6,004,407	-	6,004,407
Supporting services			
Management and general	1,372,716	-	1,372,716
Fundraising	142,105	-	142,105
Total expenses	7,519,228	-	7,519,228
Change in net assets	389,002	(574,461)	(185,459)

NET ASSETS

Beginning of fiscal year	1,442,299	5,261,271	6,703,570
End of fiscal year	\$ 1,831,301	\$ 4,686,810	\$ 6,518,111

SFP TEAM

This list includes staff of SFP from January 1, 2021 to August 1, 2022.

LEADERSHIP

Jim Cannon

Chief Executive Officer

Sari Surjadi

Chief of Staff

Andrei Klimenko

Chief Operating Officer

Blake Lee-Harwood

Chief Programs Officer

Kathryn Novak

Global Markets Director

Braddock Spear

Global Policy Director

Enrique Alonso

Global Fisheries Director

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Paul Bulcock

Chuck Burg

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Eka Darma

Yohanes Ekodono

Teddy Escarabay

Pedro Ferreira

Amalia Firman

Anna Gabis

Rose Gladstein

Carmen González-Vallés

Renato Gozzer

Sam Grimley

Annie Haylon

Christie Hendrich

Christo Hutabarat

Nur Indah

Aisla Jones

Wilis Juharini

Dorothy Li

Drin Lutchman

Charlotte Maiden

Janean Magers

Kris Marchu

Dave Martin

Marina Mendes

Katie Mihalik

Alexia Morgan

Ananta Murti

Tita Nopitawati

Merul Patel

Irham Rapy

Ian Rolmanis

Miguel Ruano

Jesika Ruslim

Heather Sadusky

Courtney Sakai

Jillian Samuel

Christiane Schmidt

Susana Segurado

Chantel Semitara

Jenna Stoner

Amy Sweeting

Mio Uchida

Pedro Veiga

Bernal Vilela López

Amber Von Harten

Megan Westmeyer

Putu Widyastuti

Chisa Woodley

SFP Takes Leadership Roles in Sustainable Seafood Community



In 2021, Aquaculture Program Director Jenna Stoner was **appointed** to the 12-member Standards Oversight Committee (SOC) of the **Global Seafood Alliance** (GSA). The SOC directs the drafting of the BAP (Best Aquaculture Practices) standards by technical committees and reports its recommendations to the GSA board of directors for final approval.

In 2022, Indrani Lutchman, SFP's program director for FIP evaluations and external relations, became the chair of the Board for the **Conservation Alliance for Seafood Solutions**. SFP has been a member of the Alliance since it was established in 2008 and has a long history of representation on the Board.



CONTRIBUTORS

This list includes consultants to SFP from January 1, 2021 to October 31, 2022.

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Tania Woodcock/On the Line
Consulting

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United Kingdom

Bambi Semroc

Arlington, Virginia, United States

Andrew Yanagihara

Tokyo, Japan

IN MEMORIAM

Gaikovina Kula was a current member of our Board and a friend to many at SFP. Although he was only on our Board for a year, we benefited greatly from his insights into small-scale fisheries management and community engagement. (October 2021)

Lafcadio Cortesi was an active member of our Board for nine years (2011-2020) and a tireless champion for ensuring that social issues are included in any discussion of fisheries sustainability. (March 2022)

Howard Johnson was an SFP staff member from the earliest days of the organization, and after he retired, a member of our Board from 2013 to 2015. He saw the importance of sustainability before most in the seafood industry, and was an early advocate and catalyst for cooperation between the environmental community and the seafood sector. (June 2022)



Sustainable Fisheries™

PARTNERSHIP

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(November 2022)