2021 Sector Sustainability Update


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SNAPPER AND GROUPER

July 2022

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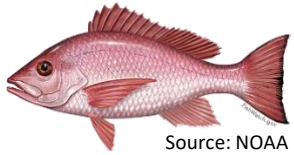

Source: NOAA

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SUMMARY

Production and trade

- **Snapper and grouper** are valuable fishery resources, highly sought after due to the excellent quality of their meat and their high commercial value and demand in major international markets.
- Production in **2019** totaled **1.2 million tonnes**, nearly **80 percent** of which was from **wild production.**
- **Asia** accounts for **86 percent** of production by volume. **Indonesia** remains the **top producing country**, with **42 percent** of global production (490,000 tonnes in 2019), followed by **China with 24 percent** of global production (65 percent of which is from aquaculture).
- **Mexico, Brazil, and Nigeria** are the only non-Asian countries in the top ten producing countries.
- **Indonesia accounts for 31 percent** of reported snapper and grouper exports by value in 2019, mainly to Taiwan, China, and Malaysia.
- Trade data for this sector is of poor quality. For example, China (like other countries) does not report imports for this sector. Existing data suggest that the **United States** is the **most important end market**, accounting for more than 84 percent of snapper and grouper imports reported by value in 2019.

T75 status and current strategy priorities

- **12.8 percent** (*c.* 150 thousand tonnes) of global snapper and grouper production is currently estimated to be either **sustainable** or **improving**.
- To reach the 75-percent target, SFP's work focuses on Indonesian and Mexican fisheries. However, improvement advances will also be needed in China, India, the Philippines, and Brazil.
- Key sustainability issues in the sector include lack of data to inform management strategies and lack of organization in the catch sector.

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Galesong landing /collector © SFP

THE TARGET 75 INITIATIVE

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

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

1 SNAPPER AND GROUPER SECTOR

This sector consists primarily of all **wild and farmed snapper** (Lutjanidae family) **and grouper** (Serranidae family) species, and similar reef fish. These species are often considered jointly as a "snapper-grouper" complex.

For the wild component, most countries report snapper and grouper landings as combined data for the entire family, rather than reporting at the species level. The farmed production for this sector is mainly focused on grouper production (*Epinephelus spp*.).

More information on the definition and scope of this and other Target 75 sectors is available here.

Large snapper on sale © SFP/ Lani Asato

2 SCOPE AND OBJECTIVES

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

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

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

Indonesian fishers © SFP

Frozen snapper © SFP/Sean Murphy

3 PRODUCTION

Snapper and grouper is an important global seafood sector, mainly for small-scale fisheries, with average global production of about 1.2 million tonnes per year in the last five years (FAO 2021a). It is also one of the sectors with the fastest growing levels of production, with a 45-percent increase since 2010. Aquaculture production has been increasing in the last 10 years and currently accounts for 21 percent of total snapper and grouper production (**Figure 1**). Asia currently contributes nearly 86 percent (c. 1 million tonnes) of the snapper and grouper produced worldwide (**Figure 2**), mainly from wild capture, which represents 75 percent of Asian production. The Americas and Africa account for 8 and 5 percent of the total production for this sector, respectively, almost exclusively through wild capture.

Indonesia continues to be the largest producing country (42 percent of total sector production), with wild capture representing almost all of the production (96 percent) in this country. China is the second most important country, representing about 24 percent of production for this sector (with farmed production representing 65 percent of the total production in the country). Malaysia, Mexico, India, and the Philippines also contribute to snapper and grouper production, although together these four countries represent less than 15 percent of total production in this sector (**Figure 3**) (FAO 2021a). Farmed production is dominated by groupers (*Epinephelus spp.*; 91 percent). Nearly 70 percent of the total wild capture is reported with little specificity, in broader categories such as "Snappers nei" or "Groupers nei" (**Appendix I**).

Figure 1 | Time series of wild and farmed snapper and grouper production (area) and annual exports (bars)

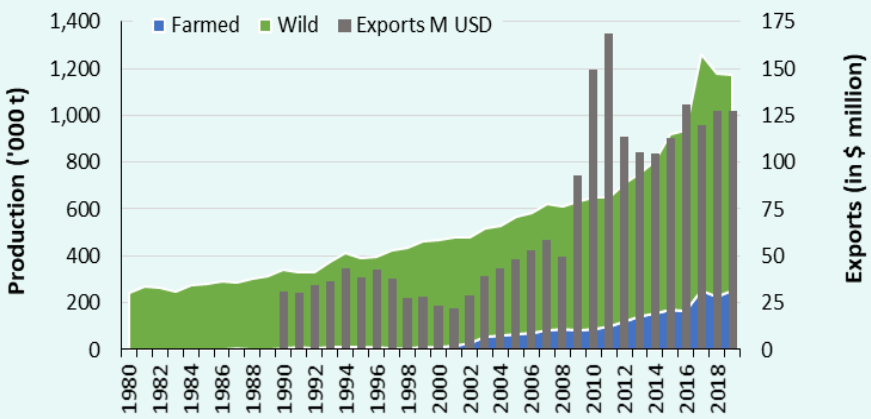


Figure 2 | 2019 Snapper and grouper production by continent and production type

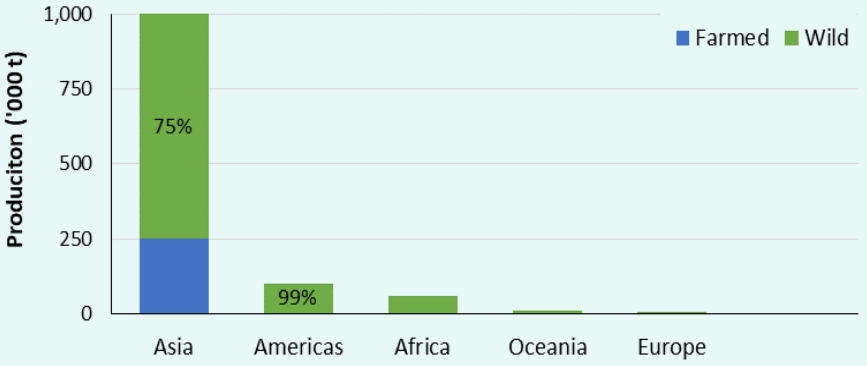
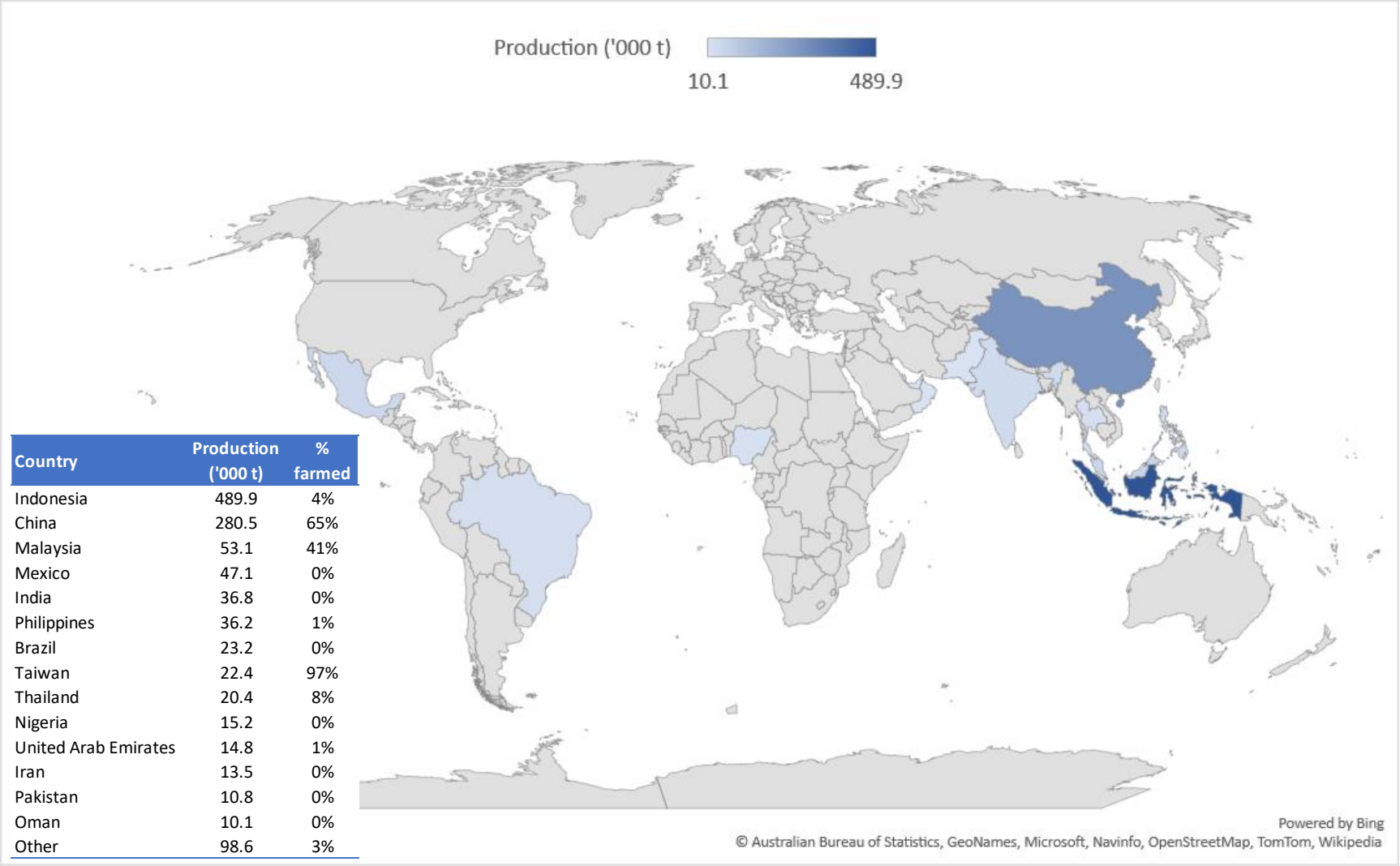


Figure 3 | The top 14 snapper and grouper producing countries (wild and farmed production combined)



Country	Production ('000 t)	% farmed
Indonesia	489.9	4%
China	280.5	65%
Malaysia	53.1	41%
Mexico	47.1	0%
India	36.8	0%
Philippines	36.2	1%
Brazil	23.2	0%
Taiwan	22.4	97%
Thailand	20.4	8%
Nigeria	15.2	0%
United Arab Emirates	14.8	1%
Iran	13.5	0%
Pakistan	10.8	0%
Oman	10.1	0%
Other	98.6	3%

Source: FAO FishStatJ

4 TRADE STATISTICS

Snapper and grouper are valuable fishery resources, much sought after due to the excellent quality of their meat and their high commercial value and demand in the major international markets. This analysis only considered trade data of commodities specifically reported as snapper or grouper. However, trade data is very uncertain for this sector and could be underestimated, since most of the snapper and grouper may be reported at higher taxa levels (e.g., in categories such as "Miscellaneous coastal fishes nei, fresh or chilled" or "Fish fillets, fresh or chilled nei"). Also, some countries (e.g., China) are not reporting imports for these species. These issues highlight the poor quality of the trade data for this sector.

Worldwide, traded seafood commodities that include snapper and grouper trade (exports) totaled more than USD 127 million in value in 2019, around the average value of the annual global snapper and grouper trade for the last decade (**Figure 1**) (FAO 2021b). Indonesia accounted for 31 percent of reported snapper and grouper exports by value in 2019, followed by Brazil (28 percent). Nicaragua, Yemen, and Costa Rica are also important source markets for this commodity (26 percent combined) (**Table 1**).

Brazil presented the largest growth in snapper and grouper exports since 2010, with a 15-percent increase in market share. In contrast, Indonesia had the most significant decrease (-32 percent) in market share since 2010 (FAO 2021b).

As with other key seafood commodities, the United States continues to be the largest market for snapper and grouper, representing 84 percent of total imports, although there was an 11-percent market share decrease between 2010 and 2019. Malaysia has seen the largest growth in terms of imports by value, with a 4-percent increase in market share in the last decade (**Table 1**; FAO 2021b). Bilateral trade flows from the main snapper and grouper exporters follow this same pattern, with the United States as the key end market for this commodity (**Table 1**). However, China does not report imports for this sector, although it is reported as a main trade partner by exporters.

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

Exporter \ Importer	USA	Saudi Arabia	Malaysia	Taiwan	China	Singapore	Other	Total 2019 exports (USD million)	% of total exports
Indonesia	5%	2%	20%	24%	24%	10%	16%	32.6	31%
Brazil	86%	0%	0%	0%	0%	0%	13%	29.8	28%
Nicaragua	100%	0%	0%	0%	0%	0%	0%	13.1	12%
Yemen	1%	99%	0%	0%	0%	0%	0%	8.2	8%
Costa Rica	100%	0%	0%	0%	0%	0%	0%	6.4	6%
Panama	100%	0%	0%	0%	0%	0%	0%	3.9	4%
Trinidad and Tobago	100%	0%	0%	0%	0%	0%	0%	3.6	3%
Maldives	0%	0%	100%	0%	0%	0%	0%	2.6	2%
Malaysia	2%	0%	0%	13%	0%	56%	30%	2.4	2%
% of total imports	**84%**	**5%**	**4%**	**3%**	**-**	**0.1%**	**3%**		

Source: FAO 2021c

*Re-export data not included. New Zealand is excluded from this analysis since this country reports red snapper (*Pagrus auratus*) as snapper, but this species is a sparid, which is not included in this sector.

5 PROGRESS AGAINST THE 75% TARGET

Currently, about 150,000 tonnes, or **13 percent**, of global snapper and grouper production is considered **improving**. All of the improving production is from wild production, mostly from Indonesia, but also from Mexico and Brazil (list of fisheries available here). Sustainable production still represents only 0.02 percent of the total sector. This production comes from snapper and grouper fisheries in the United States that are rated as green in FishSource.

Compared to the same period in 2020, the snapper and grouper sector overall showed a slight increase (2.4 percent) in percentage of volume that is sustainable or improving. These changes result only from wild production, since there are no known aquaculture improvement projects (AIPs) of certified farmed production. This improvement is mostly a result of changes in reported production of the Indonesian FIPs, rather than effective change in the sector. There were some new improvement efforts launched or added to existing Mexican FIPs (Mexico Campeche and Tabasco red snapper - vertical and bottom longline, Mexico El Rosario finfish - trap/ handline, and Mexico Guaymas finfish – handline), but the volumes reported from these FIPs are very limited.

Learn about SFP's T75 strategy and prioritized fisheries here.

6 CHALLENGES TO SUSTAINABILITY

Snapper and grouper production differs in its advances toward sustainability. While some fisheries are well-assessed and well-managed (e.g., US Gulf of Mexico), many have not been a priority for management authorities, and there remain the following challenges:

- Lack of data and fisheries assessment leading to weak management or lack of regulatory frameworks (e.g., in Mexico and Indonesia)
- Low enforcement, resulting in substantial illegal, unregulated, and unreported (IUU) fishing (e.g., in Mexico)
- Artisanal fishers are not engaged in fishery management decisions (e.g., in Indonesia)
- Artisanal fishers are not adequately registered (e.g., in Indonesia).

Most fisheries require investment in the most basic aspects of fisheries science and management, including data gathering, formal identification of stocks, stock assessment, harvest control regulations, and monitoring and enforcement. The mostly artisanal and geographically distributed nature of many of these fisheries suggests that a co-management approach would be beneficial to ensure that fishers have secure access rights (incentivizing them to act as stewards of the resource), are organized into groups that can mobilize collective action and act on their behalf, and can effectively participate in decision making to ensure their needs and long-term fishery knowledge are considered in the development of management.

Sorting the catch, Indonesia ©Shutterstock

While co-management policies need to be developed and implemented at the appropriate level of governance (e.g., the provincial level in Indonesia), improvements at the national level are required to truly effect change.

SFP is working with the snapper and grouper industry across the supply chain to address these issues, focusing on Mexican and Indonesian fisheries. Further information can be found at:

https://sustainablefish.org/roundtable/indonesian-snapper-and-grouper/

https://sustainablefish.org/roundtable/mexican-snapper-and-grouper/

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8 GLOSSARY

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

Appendix I | Top snapper and grouper species for farmed and wild production, with 2019 reported production levels

Farmed production

Common name	Scientific name	2019 production ('000 t)	% of total
Groupers nei	*Epinephelus spp*	229.4	91.4%
Mangrove red snapper	*Lutjanus argentimaculatus*	7.4	2.9%
John's snapper	*Lutjanus johnii*	7.2	2.9%
Tiger-dragon grouper, hybrid	*E. fuscoguttatus x E. lanceolatus*	4.3	1.7%
Snappers nei	*Lutjanus spp*	0.7	0.3%
Orange-spotted grouper	*Epinephelus coioides*	0.6	0.3%
Spotted rose snapper	*Lutjanus guttatus*	0.6	0.2%
Other		0.8	0.3%

Wild production

Common name	Scientific name	2019 production ('000 t)	% of total
Snappers nei	*Lutjanus spp*	335.4	36.4%
Groupers nei	*Epinephelus spp*	164.6	17.9%
Snappers, jobfishes nei	*Lutjanidae*	86.6	9.4%
Chocolate hind	*Cephalopholis boenak*	71.5	7.8%
Groupers, seabasses nei	*Serranidae*	54.7	5.9%
Leopard coral grouper	*Plectropomus leopardus*	41.7	4.5%
Greasy grouper	*Epinephelus tauvina*	22.4	2.4%
Orange-spotted grouper	*Epinephelus coioides*	14.0	1.5%
Mangrove red snapper	*Lutjanus argentimaculatus*	12.6	1.4%
Humpback grouper	*Cromileptes altivelis*	10.7	1.2%
White grouper	*Epinephelus aeneus*	10.5	1.1%
Pacific red snapper	*Lutjanus peru*	10.3	1.1%
Southern red snapper	*Lutjanus purpureus*	9.1	1.0%
Honeycomb grouper	*Epinephelus merra*	9.0	1.0%
Yellowtail snapper	*Ocyurus chrysurus*	8.4	0.9%
Other		59.9	6.5%

Source: FAO FishStatJ (FAO 2021a)

Snapper school, Indonesia © **Shutterstock**

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FURTHER INFORMATION

http://www.sustainablefish.org/

For additional information, please contact us at:
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