

SOURCING SEAFOOD RESPONSIBLY: WHAT TRADE AND RETAIL WANT

By Steven Adolf

Those involved in the global tuna fisheries and trade will have noticed that something is shifting in the sustainable management policies of our tuna resources. Increasingly, the mid- and end-market segment of the supply chain – major brands, wholesalers, traders, and retailers – are expressing their growing dissatisfaction with the implementation of the policies to guarantee a sustainable sourcing of tuna. The explicit way they express this is not only new, it also might well add to a change in basic assumptions in the institutions where decision-making on the global tuna management has traditionally been dominated by the interests of the industrial fishery fleets.



Credit: Steven Adolf

Tuna is probably the most consumed free school-caught fish on earth. Hundreds of millions of people are fed with the healthy marine proteins of at least one of the forty tuna and tuna-like species. According to a report by the Pew Charitable Trusts¹, the seven commercially most important tuna species are among the most economically valuable fishes on the planet. With the European Union and the United States as its biggest single markets, the end-value in the global consumer market for these species was an estimated USD 41 billion for a total catch of 5.5 million metric tonnes in 2018.

How sustainable are the global tuna fisheries? According to the latest report from the International Seafood Sustainability

¹ The Pew Charitable Trusts, *Netting Billions 2020: a global tuna valuation*, Oct 2020, Washington.

Foundation (ISSF)², 80.5 percent of the total catch comes from healthy stocks in terms of abundance; this is mainly because skipjack stocks contribute more than one half of the global catch of tunas, and most skipjack stocks are in a healthy situation. But a closer look shows that only six out of 23 major commercial tuna stocks worldwide recognized for stock assessment are avoiding overfishing and maintaining target stock biomass when measured against the Marine Stewardship Council (MSC) Fisheries Standard.

These figures point to a more uncomfortable truth. Without effective management, the levels of unsustainable tuna fisheries will increase rapidly due to the globally fast-expanding fishery capacity, illegal fisheries, and lack of catch data, amongst other things. Furthermore, although the effective, up-to-date management of the stocks by using so-called harvest strategies is taking shape, it is not taking place fast enough on an international level. Harvest strategies are based on a set of predetermined management objectives for the tuna fisheries in the areas under the purview of the Regional Fisheries Organizations (RFMOs). The operational component of the harvest strategy³ is known as a harvest control rule, that automatically sets fishing opportunities such as catch limits, based on population status. Once the harvest strategies are installed, the RFMOs have set the rules for the game. And the yearly time-consuming and ineffective decision-making on an international level, is replaced by an automated system based on the status of the tuna stocks.

A powerful fisheries lobby

A sustainable tuna product must guarantee consumption for future generations while respecting the ocean environment and other species. It should be well-managed, create safe and sound working conditions and ensure that it meets an increasing list of other sustainability targets that have become

² ISSF. 2022. *Status of the world fisheries for tuna. Mar. 2022. ISSF Technical Report 2022-04. International Seafood Sustainability Foundation, Washington, D.C., USA*

³ www.harveststrategies.org

an indispensable part of tuna marketing in most developed markets over the last decade. Remarkably enough, despite the huge commercial interest in marketing a sustainable sourced tuna supply, until quite recently the voices of the middle and downstream supply chain – brands, trade, and most of all retail – were hardly heard when it came to the actual management of sustainable fisheries. Policymakers and politicians of the countries involved – the tuna consuming countries on one side, and the production countries that have the large stocks swimming their waters on the other – were basically steered by the interests of powerful distant-water fishing fleets when it came to managing tuna stocks.

There is growing awareness that this curious imbalance in the representation of the different stakeholders is not a transparent and responsible way to model modern global governance of tuna stocks. Consumers, who vote commercially through the products they buy, notice how their governments have engaged with SDG14, the biodiversity targets of the high seas and climate change actions as policy priorities on their agenda. Tuna retail, brands, and trade companies do realize that this will translate into a growing demand for transparent decision-making based on sustainable policies. Yet, the vast blue economy interests that they represent are constantly passed over by the interests of the fisheries industry and their well-organized lobbies.

Turning the tide: example of the Bolton Food Group

The tide is turning. Take the case of the Italian-based Bolton Food Group. Outside the world of tuna, Bolton might be an unknown entity but for the industry, the company hardly needs any introduction. Bolton is undoubtedly one of the main tuna market stakeholders, if not the biggest in terms of turnover of the EU market and one of the largest on a global scale. Bolton Food Group was established in 1978 in Amsterdam by Joseph Nissim (1919-2019), a Greek immigrant who escaped the Nazi invaders of his country to Italy and then fought with the British Army in the African desert. Currently, his daughter Marina Nissim is at the helm of the Italian-based company as its executive Chairperson. Privately owned, the Bolton Group is a global conglomerate strong in seafood, which generated a revenue of €2.8 billion in 2021, half of which was in Europe. Tuna is its core business. Bolton controls the leading Italian canned tuna brand Rio Mare, the French Saupiquet, the Spanish brands Isabel and Cuca, and has a stake in the Spanish Grupo Calvo. In 2019 it bought Tri Marine, that, together with the Japanese Itochu and Korean FCF, form the global triumvirate of the three biggest tuna traders that supply tuna and processed tuna products worldwide. This makes Bolton one of the biggest vertically-integrated conglomerates in the global tuna market.

Having become aware of its role in the sustainability issue several years ago, Bolton has set up special programmes and is now guided by the vision to become “the most sustainable tuna company in the world”. It has set targets for sourcing from more selective fishing methods with a lower level of by-catch and environmental impact, better FAD management and sourcing from MSC-certified fisheries or from “credible” and “robust” fishery improvement projects (FIPs).

After announcing the ambition to put market-based tools in place to improve sustainable sourcing of tuna, Bolton has now taken a new step on its course for sustainability. In May of this year, Bolton Food Group’s Sustainable Development Manager, Héctor Fernández, participated in a webinar on the issue co-hosted by The Pew Charitable Trusts, the Global Tuna Alliance (GTA), the Tuna Protection Alliance (TUPA) and HarvestStrategies.org. Fernández wrote in the Spanish paper *El País*⁴ a strong plea for putting in place harvest strategies for all global tuna fisheries, starting this year with Atlantic bluefin tuna at the annual meeting of the International Commission for the Conservation of Atlantic Tunas (ICCAT) which will be held in November.

If ICCAT agrees, it would in fact be the “pearl in the crown” in the success story of “the concerted effort of the fishing industry, science, NGOs, and policy makers” in which internationally-agreed catch reductions have enabled the dramatic recovery of the bluefin tuna population in the Eastern Atlantic and Mediterranean. Once established, the system of harvest strategies would effectively guarantee the management and sustainable sourcing of the species in the future to come.

As argued, the case of harvest strategies for bluefin tuna has a meaning that goes far beyond only this species. It provides a strong argument to bring all international tuna management efforts to a more modern and efficient level. Many international fisheries under the authority of the RFMOs still make effective application of harvest strategies difficult; and many times, it is not a priority in the political agendas of our governments. According to Bolton, that is a luxury that we can no longer afford. Exponential expansion of fleet capacity, increasingly efficient fishing techniques, and illegal, unreported, and unrecorded catches are rapidly endangering an increasing number of tuna stocks in the world. Bolton underlines the urgency of putting harvest strategies in place and holds governments responsible for establishing them within the RFMOs. Bolton repeated its plea recently on the eve of the meeting of the Inter-American Tropical Tuna Commission (IATTC).

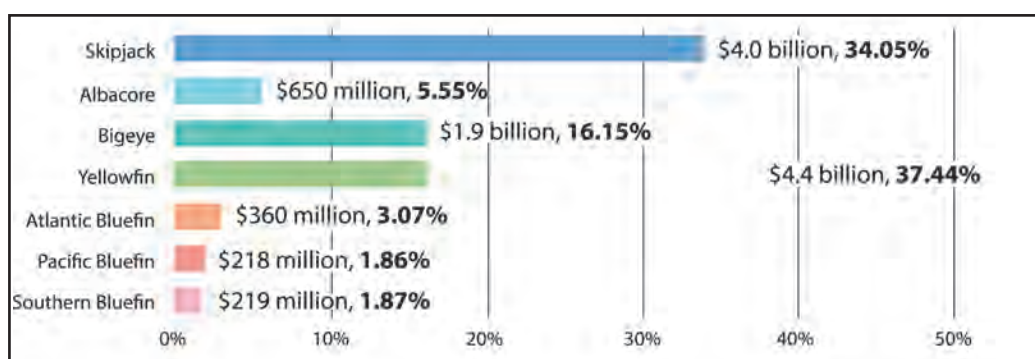
⁴ <https://elpais.com/clima-y-medio-ambiente/2022-05-18/la-hora-de-una-gestion-sostenible-de-nuestro-atun.html>

Market voices gather strength

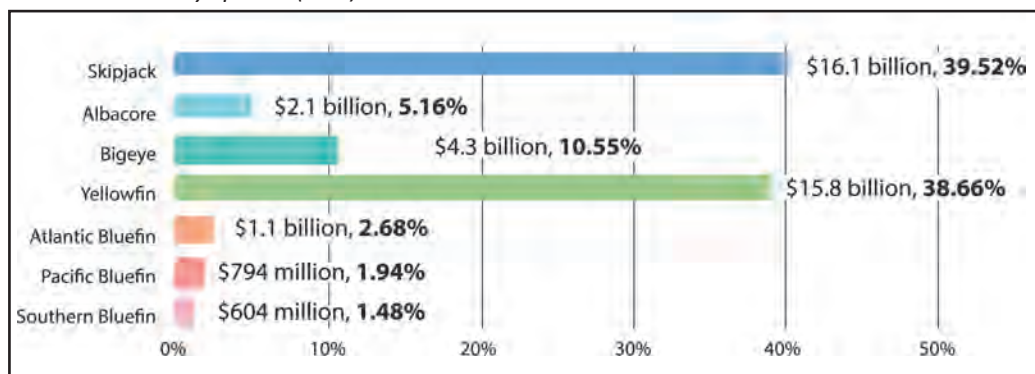
Bolton's explicit market engagement with the issue of sustainable governance at the level of tuna RFMOs fits a trend that currently is taking shape. In July, in an opinion article in the *Seattle Times*⁵, Ray Clarke (Bumble Bee Seafoods' Vice President, fisheries management and government affairs), urged the United States to take leadership in the IATTC and the Western and Central Pacific Fisheries Commission (WCPFC) to work together with Japan and Canada to set harvest strategies for North Pacific albacore tuna.

Figure 1: Tuna Values Vary by Species and Volume

2018 Dock Value by species (USD)



2018 End Value by species (USD)



Note: With less than a third of the total landings, yellowfin's dock value roughly equaled skipjack's, while the bluefin species were the most valuable per metric ton.

Source: Poseidon Aquatic Resource Management Ltd., 2019

Further, last year the Global Tuna Alliance (GTA), representing 49 retailers, suppliers, wholesalers, and brands that collectively bought 1.6 metric tonnes of tuna worth USD 2.3 billion (dock price), urged the European Commissioner for Fisheries, Virginijus Sinkevičius, in an open letter to seriously consider the voice and interest of market stakeholders in the international tuna management organizations of which the EU

⁵ <https://www.seattletimes.com/opinion/keeping-this-fish-on-the-regions-plate-requires-u-s-leadership/>

is an important and often decisive member. "We are (...) calling for accelerated action on comprehensive harvest strategies to be implemented simultaneously with the development of precautionary reference points and harvest control rules", GTA Executive Director Tom Pickerell wrote. "Despite the huge commercial importance of the marketplace, we feel that our voice is not being heard in the development of EU tuna positions". The European Commission should take up its role as a champion in the development and adoption of harvest strategies if it took seriously its own commitments with the Sustainable Development Goal 14 (Life below Water), he argued.

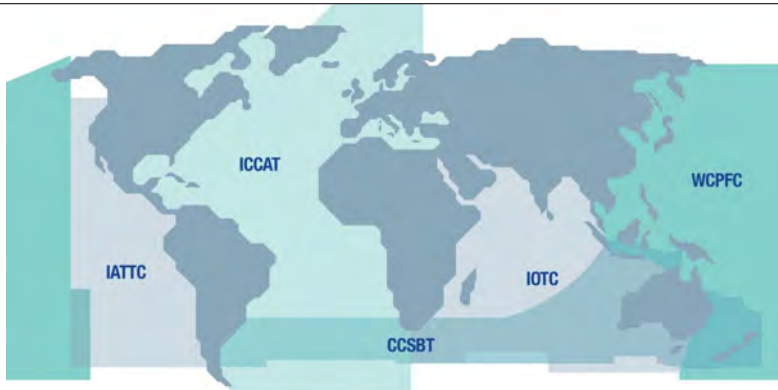
Meanwhile, in the Indian Ocean Tuna Commission (IOTC), the market voices of alarm were already heard in 2020 due to the

critical state of the stock of yellowfin tuna in the area, which according to the most recent stock assessment, is overfished. The Liverpool-based UK tuna brand Princes⁶ announced it would cut its sourcing of yellowfin from the Indian Ocean by half compared with 2017 levels in order to put pressure on the IOTC Member States to introduce cuts to the catches and work out a credible recovery plan for the species. Princes' announcement came just a few months after the UK leading retailer Tesco announced⁷ that it would stop sourcing tuna and billfish from the Indian Ocean for their own-label products, if the IOTC failed to implement a recovery plan. "Declining tuna populations threaten to impact the entire marine

ecosystem", the retailer argued. Tesco was quickly followed by the British retailer-group Co-op that reaffirmed its pledge of not selling any canned yellowfin from the Indian Ocean in its stores, maintaining its stance held for the last seven years.

⁶ <https://www.pewtrusts.org/en/research-and-analysis/video/2021/prince-highlights-the-economic-importance-of-harvest-strategies-to-seafood-processors>

⁷ <https://www.pewtrusts.org/en/research-and-analysis/video/2021/supermarket-chains-explains-how-harvest-strategies-bring-stability-to-the-seafood-supply-chain>



There are five RFMOs worldwide that oversee tuna fisheries management in their respective ocean regions.

CCSBT – Commission for the Conservation of Southern Bluefin Tuna

IATTC – Inter-American Tropical Tuna Commission

ICCAT – International Commission for the Conservation of Atlantic Tunas

IOTC – Indian Ocean Tuna Commission

WCPFC – Western and Central Pacific Fisheries Commission

Credit: ISSF

like tuna. RFMOs have the authority to establish fisheries conservation and management measures on the high seas outside the exclusive economic zones (EEZs) of individual nations. That concerns issues such as effort controls, quota allocation, closures at sea and other requirements like rulings for the use of fish aggregating devices (FADs) and (electronic) monitoring. These are tools that are key in fighting the major problems of fisheries on the high seas like overexploitation, bycatch of other species, damage to the environment, transshipment and illegal, unreported, and unregulated (IUU) fishing.

RFMOs essentially bring together the two sides of fisheries: on the one hand, the coastal states in the region where the fishery takes place and on the other, the distant-water fishing nations which harbour the large industrial fleets that harvest the fish in the global oceans. There are in total 17 RFMOs that manage fisheries in the global oceans, five of which are dedicated to the different tuna stocks: the WCPFC (2004) and the IATTC (1949) in the western and eastern Pacific, respectively; the IOTC (1996) in the Indian Ocean; the ICCAT (1966) in the Atlantic; and the Commission for the Conservation of Southern Bluefin Tuna (CCSBT, 1994) in the southern hemisphere of the oceans. These RFMOs, which function in a way that you could consider as a kind of United Nations for tuna management, have their regular yearly agenda to decide on management policies in meetings attended by hundreds of national delegates, lobby groups and observers of NGOs.

The common denominator of all these pledges is clear: the voice of a market that no longer accepts its role as a passive bystander in the international governance of sustainable tuna management. It underlines the urgency to consider the crucial importance of sustainable sourcing to supply the markets.

RFMOs must address longstanding issues

The increased awareness of the market stakeholders of safeguarding a sustainable sourcing of tuna focusses on the issues around state governance in the Regional Fisheries Management Organizations or RFMOs: its serious problems with transparency, effectiveness, and structural imbalance of decision-making.

Though quite unknown to the general public and even many politicians and policymakers, RFMOs play a crucial role in fisheries management policies on an international level. Most of the organizations are closely related to the United Nations Law of the Sea (UNCLOS). The Member States are countries with fisheries interests in ocean areas with migratory species

Most tuna RFMOs were established in the second half of the last century, and as a result they bear all the characteristics of organizations focussed mostly on fisheries and less on measures related to managing sustainable sourcing. They were not organized around the increasing range of different sustainability goals of the 21st century, a context which affects a much broader group of stakeholders, including markets and consumers. Adding to the current problems, most RFMOs' decision-making is consensus-based, which often makes it difficult to get a clear picture how policies have been decided upon and what interests they reflect. Many times, science-based proposals are blocked by a few Member States and

effective solutions fail to get approved within the needed time schedule. Furthermore, lack of transparency of fisheries data adds to the failing effectiveness of the policy measures. For the market stakeholders like trade and retail, the problems in the RFMOs represent a fundamental issue. They need a product that meets the increasing sustainability requirements they are held responsible for by consumer markets. That translates into a direct commercial interest. They entirely rely on effective RFMO management of the tuna fisheries, but until recently were practically ignored as stakeholders whose direct interests are actually part of the RFMO negotiating table. This can take extreme forms. For example, the European Union is represented in the WCPFC, thanks to the limited presence of the Spanish distant-water fleet in the area. However the Western and Central Pacific represents the most important sourcing area for skipjack tuna in the European Union, globally the largest single consumer market for tuna. And while the influence of the strong and well-organized large-scale fisheries is visible during most of the RFMO meetings, the European market voice is hardly heard.

Market-driven push for harvest strategies

The most up-to-date management tool in the RFMOs that can guarantee sustainable supply are harvest strategies. This is the position held by Tom Pickerell of the GTA, who believes that harvest strategies will continue to be a central issue in the next years when it comes to the interests the

Alliance defends. The fact that many of the tuna stocks in the RFMOs are still in the green according to the ISSF report (no overfishing or being overfished) is no argument to not put the harvest strategies in place, he argues – certainly not under the current circumstances of rapidly increasing capacity of the fleets and the problems of IUU fishing. “All RFMOs have a mandate and a time schedule to deliver the harvest strategies. But according to the analysis of the ISSF, the tuna RFMOs are not delivering”, he said.

Most of the supply chain companies are looking beyond the actual state of the stocks, Pickerell argues. “What if the management in place is lacking? It is like having a house without a roof. When it starts to rain, you want to have the protection of the roof in place.” Héctor Fernández of Bolton states a similar point: “You need harvest strategies instead of a reactive response. No management can be based on a reactive approach, it must be anticipated. You cannot wait for disaster to trigger the decision-making in the RFMOs.”

At the end of the day, the argument of the market boils down to a simple message: if there is no proper management in place, there will be no sustainable tuna; and brands, traders, and retailers cannot sell it. And as British retailers made clear, the market has the most powerful tool to enforce change: refusal to buy from unsustainable sources. That might be easier said than done, but at least the die is cast. Pickerell: “In order to change the current dynamic in the RFMOs, we are using commercial power.”



Credit: Steven Adolf



Steven Adolf (1959) is a writer, researcher, and consultant for sustainable governance of tuna fisheries. His latest book *Tuna Wars* (Springer, 2019) tells the history of the power struggles emerging around tuna and the present-day issue of the governance of sustainable fisheries in the global markets for the most-consumed fish in the world. He lives between Amsterdam in The Netherlands and Barbate in the south of Spain, port of the ancient, traditional Almadra fisheries on bluefin tuna.