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**Changing Tuna Markets Progress 2012 Report Greenpeace**

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# Changing Tuna

A large tuna fish is captured mid-jump, leaping out of the dark blue ocean. The fish's body is sleek and metallic, reflecting the light, with a prominent silver stripe running along its side. Water droplets are frozen in the air around the fish, emphasizing its motion. In the background, a range of dark, forested mountains stretches across the horizon under a sky filled with heavy, grey clouds. A wooden pole, likely part of a fishing boat, is visible in the lower right corner, angled upwards towards the fish.

How the global  
tuna industry is  
in transition to  
sustainable supply

**GREENPEACE**

# The race for sustainable tuna

An industry in transition




Image Skipjack tuna caught by pole-and-line. When well managed, such fishing practices can help maintain a sustainable supply of tuna.

The global tuna industry is undergoing a period of rapid transformation. Driven by the urgent need to protect tuna stocks from overfishing or to help rebuild damaged tuna populations, and in response to growing global consumer demand for sustainable seafood, progressive tuna companies are fast adapting their fishing and supply chains to ensure they can meet these new standards.

This change is not taking place in isolation. In the Western and Central Pacific, where close to 60% of the world's tuna is caught, the Pacific Island Countries (PICs) are acting together to reclaim their waters and the tuna within them from Distant-Water Fishing powers who have for years exploited national waters under access agreements, or under free access in international waters, taking fish for sale in wealthier nations.



An underwater photograph showing a fishing lure with a long, thin, yellowish-brown body and many small, white, spiky appendages. The lure is positioned diagonally across the upper half of the frame. Several small, silver fish with dark vertical stripes are swimming around the lure. The background is a clear, deep blue water.

‘As the global tuna industry transforms, the question is not ‘who will be the next company to change?’ but ‘which businesses will lose out by acting too slowly?’

Oliver Knowles, Oceans  
Campaigner, Greenpeace



Image School of fish around a fish aggregating device or FAD in the Western Pacific.

Historically, the fees paid by fishing powers for access to these tuna rich waters have been a mere 6% of the value of the fishery, but through innovative new approaches, regional governments are together looking to reap higher returns for their countries from the tuna fishing conducted in their waters. By working together to create the Pacific Commons marine reserves, these nations are setting aside huge areas of the Pacific, off-limits to tuna fishing and restricting destructive fishing methods in their waters.

Around the globe, some of the biggest international tuna industry businesses, including leading brands and major retailers, are making commitments to phase out the use of destructive Fish Aggregating Devices (FADs) when used in purse seine fisheries, and are actively supporting the designation of the Pacific Commons as marine reserves by agreeing not to sell tuna sourced from these locations.

Momentum towards sustainability is also starting to build through the longline tuna supply chain where urgent and far-reaching reform is needed to clean up this highly unregulated sector.

This report documents some of the changes being made by leading brands and retailers around the world to build and secure sustainable supplies of tuna.

# The Challenges





Image Fishermen scoop up tuna gathered around a fish aggregating device (FAD).

**Overfishing** Many of the world's tuna species, such as bluefin, bigeye and some yellowfin and albacore tuna populations, are already heavily depleted due to years of overfishing. Even those stocks of tuna thought to be healthy, such as skipjack, are coming under increasing pressure as other species are fished away due to increasing fishing effort in the global tuna fishing industry.

### **Destructive and wasteful fishing**

Much of the world's tuna is caught using purse seine nets with Fish Aggregating Devices or FADs, natural or artificial floating objects often equipped with satellite-linked sonar devices to attract marine life, enabling easier fish catches. FADs used with purse seine nets are not only associated with high bycatch rates of juvenile yellowfin and bigeye tuna, they also have high bycatch rates of non-target species such as sharks, rays and even turtles. Most of world's longline fishing is conducted without the use of bycatch mitigation techniques, resulting in up to 30% of the catch consisting of unwanted and often endangered species such as sharks and turtles. This sector is also riddled with illegal fishing largely due to routine transshipments at sea. Human rights abuses within the industry are also reported.



**Image** Tuna is transhipped from an illegal, unregistered and unlicensed (IUU) purse seine fishing vessel onto a reefer, or cold storage vessel, on the high seas, close to the border with Indonesia's Exclusive Economic Zone (EEZ).

‘The balance of power between the fishing fleets and tuna has shifted too far in favour of the fleets.’

Professor Callum Roberts,  
University of York (UK)





**Poor control** Years of poor or non-existent monitoring and control of tuna fisheries has led to overfishing and significant levels of Illegal, Unregulated and Unreported (IUU) or pirate fishing, meaning that actual catch and bycatch levels are significantly higher than reported.

**An unprotected marine environment** With few exceptions the marine environment is unprotected, allowing the fishing industry to pursue tuna across our oceans. Spawning sites and migratory routes for tuna, where the fish are particularly susceptible to overfishing, also remain unprotected.

Global  
change.  
Real  
transformation.





**Image** Crew on a pole-and-line vessel catch skipjack tuna in the Pacific.

Responding to many of these challenges, progressive businesses are changing the way they catch their tuna and manage their supply chains by making clear commitments to sustainability with explicit deadlines for delivering the necessary steps to achieve healthy oceans.

In the world's two biggest tinned tuna markets, the US and the UK, major brands and retailers have already committed to phasing out destructive purse seine FAD-caught tuna from their supply chains, in favour of pole-and-line or purse seine FAD-free fish. Some companies are also starting to request that their longline-caught albacore is sourced from best practice fisheries where bycatch is minimised and no transshipments at sea take place.

Many companies are committing to not sourcing from potential marine reserve sites such as the Pacific Commons. As a result, these companies are beginning to make significant improvements to their fishing operations on the water and along their entire supply lines. Delivering sustainable products means that companies are now building fully transparent chains of custody so that they can fully track products from sea to supermarket shelf.

Important progress is also being made in many other countries around the world as they respond to rapidly increasing consumer awareness of the plight of tuna stocks and marine life.

# Cleaning up the UK Market



**Image** Tuna cans from supermarkets in the UK

In the UK, the tinned tuna market has been transformed as all of the major brands and retailers are now selling or have committed to sell 100% pole and line or FAD-free purse seine caught skipjack, albacore and some yellowfin tuna.

### **Cleaning up the retail sector to improve skipjack fisheries**

Before Greenpeace launched its tinned tuna campaign, three major UK retailers – Sainsbury's, Marks & Spencer and Waitrose – were all sourcing 100% pole-and-line for their products.

As a result of campaigning by Greenpeace, all of the other major UK retailers have now made similar commitments. Tesco, the world's third largest retailer and the largest UK chain, has committed to source 100% pole-and-line tuna by the end of 2012. Asda, owned by the world's largest retailer Walmart, has now committed to 100% FAD-free or pole-and-line tuna by the end of 2014. Recently it has further committed to source all tuna sold in Asda own-brand products (including sandwiches, salads, and ready meals) from pole-and-line fishing operations.

Another major UK retailer, Morrisons, has committed to switch to 100% FAD-free or pole-and-line by the end of 2013. The company has also committed to a new labelling programme for its tinned tuna so that every can will show the catch method used, area of origin, place of canning and a new pole-and-line logo.



## Shifting major brands

International Seafood Sustainability Foundation (ISSF) member John West (part of MW Brands and owned by the world's largest seafood processor, Thai Union) has committed to switch to 100% FAD-free and pole-and-line caught tuna by the end of 2016. As part of its 2016 commitment, John West has provided Greenpeace with a detailed programme for change that lists the annual targets they plan to reach to ensure their commitment stays on track.

Princes, owned by giant Japanese conglomerate Mitsubishi, has also committed to far-reaching change. Princes is on track to ensure that 100% of its tinned tuna is FAD-free or pole-and-line caught by the end of 2014. The company has also promised to label its cans with species and sourcing details, and to exclude bigeye tuna from its supply chain. Like John West, Princes is also a member of ISSF.

Both companies have made commitments not to source any tuna from the Pacific Commons.

**Image** A juvenile silky shark (*Carcharhinus falciformis*) is followed by a school of rainbow runners (*Elagatis bipinnulata*) and a pilot fish around a fish aggregating device (FAD).



An underwater scene with a deep blue background. Several fish are visible, including a large shark in the lower center, a striped fish in the bottom left, and several smaller fish swimming in the upper left and middle. The text is overlaid on the right side of the image.

‘M&S supports the establishment of large scale no-take marine reserves and believes that the retail sector has a crucial role to play in supporting this initiative.’

Richard Luney, Wild Fish and Aquaculture Manager, Marks & Spencer.

# Changing the US market





Image Skipjack tuna being sorted at a cannery processing plant.

The US is the world's largest market for tinned tuna, which means that change in this market comes with particular significance. As the market also includes albacore tuna that is mainly supplied by longline fisheries, this market will also play a central role in leading global improvements to the longline fishing sector.

In February 2012, following dialogue with Greenpeace, Safeway, the third largest grocer in the US (with 1,700 stores across the country), announced that all of its own-brand skipjack tuna will be sourced from 100% FAD-free sources as of April 2012. This amounts to some 4.5 million cans of tuna. The commitment also includes an undertaking not to source any tuna from the Pacific Commons.

Safeway will be sourcing its FAD-free skipjack tuna from Tri Marine, in doing so abandoning its previous skipjack supplier, Thai Union-owned Chicken of the Sea. The entry into the US market of a competitively priced sustainable tinned tuna product is likely to have a big impact on the market, leaving other leading brands such as Chicken of the Sea, Bumblebee and Starkist behind.

Who will be next to move in the US market and secure a sustainable supply?

In an interesting new trend, the presence of smaller, boutique label pole-and-line and troll caught albacore in numerous retailers is also on the rise in the US.

Greenpeace continues to run a high profile campaign across the US encouraging Chicken of the Sea to phase out FADs and support marine reserves. With a sustainable tuna option soon to be widely available in the US and real changes being made on the water by fleets supplying US companies, it appears that working towards sustainable tuna supply is fast set to become the new business reality facing tinned tuna brands and retailers in the world's biggest market.



**Image** An Olive Ridley turtle (*Lepidochelys olivacea*) swims in the open blue ocean of the Pacific.





‘Safeway’s sourcing decision is driven by concerns about over-harvesting of fish and the significant mortality rate of non-target (bycatch species) – such as sea turtles, sharks and pelagic fish – associated with skipjack fishing using FADs.’

Safeway press release,  
February 2012

# Transforming the Canadian market



**Image** Worker at a tuna processing plant using a knife to cut a yellowfin tuna. Yellowfin tuna is among the species that are seriously threatened due to overfishing.



Change is also underway in Canada, another key market for both purse seine and longline caught skipjack and albacore tinned tuna. Leading tinned tuna brand Gold Seal, owned by Canadian Fishing Company (Canfisco), has already committed to sourcing FAD-free skipjack by 2015. Canfisco also committed to stop sourcing from the Pacific Commons by 2015.

Wild Planet, a smaller but influential eco-brand of tuna, also committed not to source from these or other proposed marine reserves.

The recent news from Safeway in the US also has a direct effect on its Canadian counterpart, Canada Safeway, the country's fourth largest retailer. Safeway has confirmed to Greenpeace that its US commitment will also apply to all of its skipjack offerings in Canada. This move follows the removal of red-listed yellowfin tuna from its private label brand in 2011 due to health concerns. Following pressure from Greenpeace, other companies also removed yellowfin from sale in 2011. These included Canada's second largest canned tuna brand, Ocean Brands, who replaced yellowfin with pole-and-line caught skipjack, marking its introduction to the Canadian market by a major national brand.

Canada's largest supermarket chain, Loblaw, introduced a private label line of troll-caught albacore in its nationally recognised brand President's Choice.

With major players now signed up to FAD-free or pole-and-line caught skipjack or troll-caught albacore tuna, and offering these products at a competitive price, there is now a growing incentive for other Canadian brands and retailers to move quickly to improve their sourcing policies and provide consumers with the sustainable products they demand.

Greenpeace is set to maintain its campaign on leading Canadian tuna brand Clover Leaf, owned by Bumble Bee Foods and Lion Capital. With major players now making strong sustainability commitments, the pressure is mounting on Clover Leaf to stop sourcing tuna from highly destructive purse seine FAD fisheries and traditional longline fishing in favour of sustainable alternatives and to support the creation of the Pacific Commons marine reserves.

**Image** A fish aggregating device (FAD) and a Greenpeace diver in the background.








# Progress in New Zealand and Australia





Change is also taking place in New Zealand. In May 2011, leading retailer Foodstuffs committed to introduce a pole-and-line range to its Pam's brand tinned tuna products. Just a month later, recognising the seriousness of the issues around purse seine FAD use, the company announced that it would be shifting the majority of its canned tuna range (around 85%) to exclusively FAD-free tuna.

A close-up photograph of a fisherman's arm and hand, wearing a tan long-sleeved shirt and a grey glove, holding a large, silver fish. The fish is being held up, and water is splashing around it. In the background, the blue ocean and a cloudy sky are visible. The fisherman is holding a wooden pole or handle.

‘We have been  
working towards  
securing a long-  
term supply of  
canned tuna that  
can be sourced  
sustainably. ’

Dave McAteer, General Manager,  
Foodstuffs Own Brands Ltd



Image With almost no bycatch, well managed pole-and-line fisheries represent a sustainable alternative to FADs used with purse seines.



In Australia, the Safcol brand is now committed to 100% pole-and-line caught skipjack. Smaller brand Fish4Ever, now available in an increasing number of markets including Australia, New Zealand and the UK, continues to source only from 100% pole and line, handline or trolled tuna fishing operations.

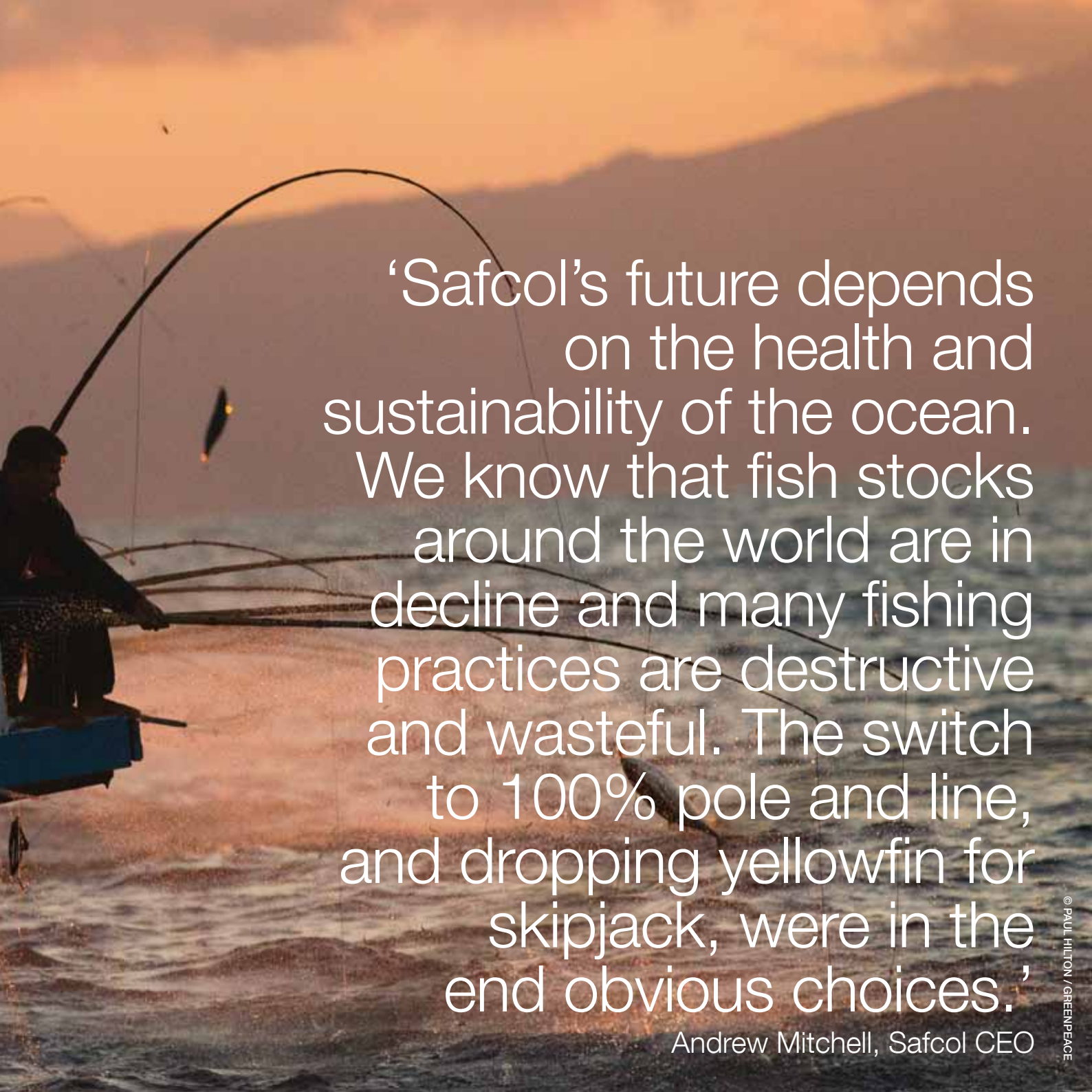
Indicative of the progress being made elsewhere, other major brands and retailers in Australia are also making changes to their product lines. Major retailers Coles and Woolworths have now each introduced a line of own-brand pole-and-line skipjack and albacore respectively. Aldi and IGA also now sell a line of own-brand pole-and-line caught skipjack.

Greenseas brand, owned by Heinz, has also committed to shift to 100% FAD-free by 2015. The company gives generously to the Secretariat of the Pacific Community's Oceanic Fisheries Programme, and publicly advocates Pacific marine reserves for the conservation of tuna stocks.

**Image** The waters between Indonesia and Australia in the east Indian Ocean are known to be an important spawning ground for yellowfin, bigeye, and bluefin tuna. Fishing practices such as pole-and-line contribute to the long-term sustainability and evolution of the stock.





A fisherman is silhouetted against a vibrant sunset sky, reeling in a large fish. The fishing rod is bent into a dramatic arc, and the fish is visible in the air. The water is dark and choppy. The text is overlaid on the right side of the image.

‘Safcol’s future depends on the health and sustainability of the ocean. We know that fish stocks around the world are in decline and many fishing practices are destructive and wasteful. The switch to 100% pole and line, and dropping yellowfin for skipjack, were in the end obvious choices.’

Andrew Mitchell, Safcol CEO

# Moving European markets



In Italy, the third-largest tinned tuna brand and ISSF member Mareblu – part of MW Brands and owned by the world's largest seafood processor, Thai Union – has committed to selling only pole-and-line caught or FAD-free purse seined tuna by 2016. The company also supports the Pacific Commons Marine Reserves and has committed not to source from these areas.

Bolton will remain a key focus of the Greenpeace campaign in Italy. Bolton tuna is supplied by Tri Marine, who also now supply Safeway US with sustainable FAD-free purse seined tuna. If Tri Marine can deliver sustainable tuna to its customers in the US, why can't it deliver these products to its customers elsewhere?

Another of Italy's leading tinned tuna brands has also made changes. AsdoMar has now shifted 50% of its skipjack supplies to pole-and-line. The company has also committed to supporting marine reserves, and has introduced significantly improved product labelling, which now includes common and scientific names of species, catch areas and fishing methods.





**Image** Skipjack tuna caught by pole-and-line are offloaded in Larantuka, Flores, Indonesia.





# An industry on the move

market leaders  
and market losers





As the global industry responds to the need to source tuna sustainably, it is increasingly clear that some businesses are rising to the challenges this presents and demonstrating their ability to operate innovatively, ambitiously and decisively, while others are stalling and risk competitive advantage by losing access to sustainable supplies.

### **The ISSF resisting change**

Though the ISSF was established with the remit of promoting sustainability and science, its increasingly resistant stance to the huge changes taking place in the global market cast doubt on its genuine ambitions. Prominent members are breaking rank from agreed ISSF policy, which currently supports the use of destructive FADs despite mounting scientific evidence that urgent action is needed and possible. ISSF is opposed to supporting specific marine reserve sites such as the Pacific Commons, and is increasingly isolated and unwilling to keep up with industry trends and consumer demand.

**Image** Fishermen use the pole-and-line method to catch skipjack tuna off Flores, Indonesia.



Recent announcements by the ISSF, such as prohibiting shark finning on board ISSF member vessels and in their supply chains, fall so far short of addressing this widespread and serious issue that they serve to further undermine ISSF's stated goals of taking on the sustainability challenges facing the industry. Given the increasing Asian membership of the ISSF and the involvement of Asian tuna longline vessels in ISSF supply chains, statements of this nature without the necessary action to back them up do more to protect the status quo than to drive necessary reform.

Many of the companies making commitments to phase out FADs or support the Pacific Commons are ISSF members – such as Princes, John West and Mareblu. ISSF members hoping that membership might protect them from having to make changes to their supply chains must now be wondering which other competitors are about to secure themselves market advantage by committing to sustainable pole-and-line, responsible longline or FAD-free purse seine tuna supplies.

Image Shark fins drying on the upper deck of a longline pirate vessel.







Progressive  
politics.

Progressive  
business.

Individual  
action.





Visionary business leaders and politicians are recognising the simple fact that running tuna fishing sustainably today is the only way to secure supplies for tomorrow and beyond. Sustainable sourcing is an investment in the future – protecting local food supplies, jobs and economies and also delivering a business model that keeps the industry viable for the long-term. You can join the forward-thinking business managers who are already delivering change by developing a sustainable seafood procurement policy that:

- Ensures you do not sell tuna that comes from poorly managed and overfished stocks. All bluefin, bigeye and some yellowfin and albacore tuna are experiencing overfishing and should not be traded by responsible operators until management improves and stocks recover;
- Makes a clear commitment that your company will not source tuna (or other fish) from the Pacific Commons areas (more information on the Pacific Commons Marine Reserves can be found at [www.greenpeace.org/international/pacificcommons](http://www.greenpeace.org/international/pacificcommons);

Image Workers  
sort processed  
tuna at a cannery.



**Image** A yellowfin tuna takes the hook during a pole-and-line fishing trip in the waters off Larantuka, Flores.





- Always gives priority to supporting small-scale fishing operations that take place in coastal states' where tuna fisheries can provide much needed employment and income. If well managed and controlled, then pole-and-line, hand-line and trolling are all tuna fishing methods that can deliver sustainable and equitable fisheries;
- Sources from well managed and controlled FAD-free purse seine fisheries or from well managed longline fisheries where other options are not available. These must be fisheries where state-of-the-art bycatch mitigation methods are used and no transshipments take place at sea;
- Insists on fully independent, 100% observer coverage for all industrial-scale purse seine and longline vessels to ensure compliance with oceans management measures;
- Ensures a full and transparent chain of custody for all your tuna products that is third party verified and publically traceable;
- Meets the demands of consumers around the globe for sustainable tuna products that are fairly priced and clearly labelled with details about capture methods, fishing grounds and species.
- Commits your business to proactively ensuring the demand for sustainable fishing is heard by decision makers and that policy changes such as those promoted by the Pacific Island Countries to transform their fisheries are supported.

[www.greenpeace.org/  
international/en/campaigns/  
oceans/tuna/](http://www.greenpeace.org/international/en/campaigns/oceans/tuna/)



**Image** Crew on a pole-and-line vessel stand on watch for schools of tuna on the surface in the waters off Larantuka, Flores.







© PAUL HILTON / GREENPEACE

‘We are keen to see a positive measurable impact from the creation of Pacific Commons Marine Reserves on tuna populations and a beneficial contribution to local island people.’

Princes, major UK tinned tuna brand and ISSF member

‘The scale of moving all of our tinned tuna to 100% pole-and-line caught was a massive investment, but we were convinced it was the most sustainable alternative.

We did not pass the cost of doing this on to our customers as they expect us to do the right thing.’

Ally Dingwall, Agriculture and Fisheries Manager, Sainsbury’s.



Greenpeace is an independent global campaigning organisation that acts to change attitudes and behaviour, to protect and conserve the environment and to promote peace.

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