



# Landscape Review of Sustainable Seafood Precompetitive Collaborations

Created by CEA Consulting on behalf of the Sustainable Seafood Funders Group

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**CEA** CONSULTING

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## Glossary of Terms

Term	Description	Term	Description
AIP	Aquaculture improvement project	IUU	Illegal, unreported, and unregulated
ASC	Aquaculture Stewardship Council	MBAq	Monterey Bay Aquarium
EDF	Environmental Defense Fund	MSC	Marine Stewardship Council
EJF	Environmental Justice Foundation	NOAA	National Oceanic and Atmospheric Administration
FAO	Food and Agriculture Organization	NFI	National Fisheries Institute
FOA	Friends of Ocean Action	NGO	Non-governmental organization
FIP	Fishery improvement project	PCC	Pre-competitive collaboration
GSA	Global Seafood Alliance	RFMO	Regional Fishery Management Organization
GDST	Global Dialogue on Seafood Traceability	SEA Alliance	Seafood Ethics Action Alliance
GlobalG.A.P	Global Good Agriculture Practices	SeaBOS	Seafood Business for Ocean Stewardship
GGGI	Global Ghost Gear Initiative	SFP	Sustainable Fisheries Partnership
GSI	Global Salmon Initiative	SNP	Seafood Nutrition Partnership
GSSI	Global Sustainable Seafood Initiative	SSC	Sustainable Seafood Coalition
GTA	Global Tuna Alliance	SSCI	Sustainable Supply Chain Initiative
HKSSC	Hong Kong Sustainable Seafood Coalition	SSP	Sustainable Shrimp Partnership
HLP	High Level Panel for a Sustainable Ocean Economy	STF	Seafood Task Force
ICC	International Coastal Cleanup	SHRimp	Shrimp health resources improvement project
IDH	The Sustainable Trade Initiative	UNGC	United Nations Global Compact
ISSF	International Seafood Sustainability Foundation	WWF	World Wildlife Fund

## Section 1

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# Context and Methodology

# Purpose, Methodology, and Funding Support

## PURPOSE

- Build on CEA Consulting's [2018 landscape review](#) of 12 sustainable seafood precompetitive collaborations.
- Update the seafood markets community's understanding of the evolution of the precompetitive collaboration landscape, highlighting key data trends and emerging insights.

## METHODOLOGY

- Identified 16 sustainable seafood precompetitive collaborations for the report in collaboration with the Sustainable Seafood Funders Group (SSFG).
- Reviewed publicly available website materials for all precompetitive collaborations to inform individual platform profiles.
- Conducted key informant interviews with 14 of the 16 precompetitive collaboration leaders<sup>1</sup> to supplement publicly available information relating to platform mission and operations and fill in gaps from desktop research.

## FUNDING SUPPORT

- SSFG commissioned CEA Consulting to conduct this analysis in the summer and fall of 2021. SSFG is comprised of the following global seafood markets funders: the Gordon and Betty Moore Foundation (Moore Foundation), David and Lucile Packard Foundation (Packard Foundation), and Walton Family Foundation.

<sup>1</sup> Two precompetitive collaboration leaders were unavailable for interviews.

# Platforms Reviewed and Research Focus

## PLATFORMS REVIEWED

FMI Seafood Strategy Committee

Food Service Roundtable

Global Dialogue on Seafood Traceability

Global Salmon Initiative

Global Sustainable Seafood Initiative

Global Tuna Alliance

Hong Kong Sustainable Seafood Coalition

International Seafood Sustainability Foundation

NFI Crab Council

Seafood Ethics Action Alliance

Sea Pact

Seafood Business for Ocean Stewardship

Seafood Task Force

Sustainable Fisheries Partnership Supply Chain Roundtables

Sustainable Seafood Coalition

Sustainable Shrimp Partnership

## RESEARCH FOCUS

- Highlight best practices, key data insights, and emerging trends across the field
- Focus areas:
  - Platform commitments, goals, and program areas
  - Monitoring and public reporting systems
  - Financial contributions and business model
  - Government advocacy activities
  - Collaboration and partnership with NGOs and other precompetitive platforms

## Section 2

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# Overview and Data Insights

## The sustainable seafood precompetitive collaboration landscape expands in number and scope since CEA's 2018 review

The sustainable seafood precompetitive collaboration landscape continues to evolve and grow, with four new platforms launched since CEA's 2018 review.



Platforms engage companies across the supply chain, including retailers, hotel chains, suppliers, distributors, producers, and processors.



The following platforms have joined the landscape since 2018: the Global Tuna Alliance, Hong Kong Sustainable Seafood Coalition, SEA Alliance, and Sustainable Shrimp Partnership.



Markets supporting precompetitive collaborations also continue to grow, with companies across the Americas, Europe, Asia, and Oceania participating in 16 platforms.



To date, almost 400 companies are engaged in 16 precompetitive collaborations, up from about 250 engaged in 12 platforms in 2018.<sup>1</sup>

Four types of platforms archetypes have emerged and reflect differing priorities, types of members, and levels of supply chain engagement:<sup>2</sup>

Typical models include:

- **Knowledge-sharing entities** that emphasize education, advising, and thought-partnership
- **Commitment-oriented platforms** that are time-bound and not time-bound in nature
- **Scientific research bodies** that collect data and produce outputs for the platform and broader community
- **Project funders** that prioritize progressing FIPs and AIPs and other projects on the water

While some platforms use time-bound commitments to hold members accountable for progress publicly, the most common platform structure is open-ended without targets for completion. 80% of the platforms (n=13) are structured around some type of time-bound or open-ended commitment for members to reach.

<sup>1</sup> CEA limited its review to only 16 platforms.

<sup>2</sup> Platform archetypes are not mutually exclusive.



## Platforms seek engagement and accountability, although only half report progress publicly; most platforms receive some philanthropic funding

**Half of the platforms (n=8) surveyed report progress publicly.**

Models for reporting include:<sup>1</sup>

- Public reporting of individual member and/or aggregated 3<sup>rd</sup> party audits (n=5)
- Public reporting of general progress and activities (n=7)
- Confidential internal reporting on 3<sup>rd</sup> party audits (n=3)
- Confidential internal reporting on general progress and activities (n=2)

**Platforms use a variety of strategies to promote individual and collective accountability towards goals and enforce member compliance.**

Some platforms face challenges in holding individual companies accountable for progress and incentivizing engagement toward platform goals. Platforms that struggle to hold participating companies accountable, or incentivize consistent engagement, have found value in external scrutiny (e.g., media attention) to encourage action and promote accountability.

**Precompetitive collaborations have several different funding models, the most common of which is receiving both philanthropic and industry financial support.** The majority of platforms (n=11) receive some type of philanthropic support.

Funding models include:

- Annual fee based on volumes sold (in some cases, in addition to a base fee)
- Annual flat fee per member
- Tiered membership structure

Several platforms identified challenges covering secretariat and technical support costs in the near-term.

**Platform funding models**



<sup>1</sup> Models for reporting are not mutually exclusive. Several platforms publicly report on both individual/aggregated audits and general platform progress.

## Almost all platforms participate in government advocacy, cross-collaborate with other platforms, and receive formal or informal NGO support

**15 platforms engage in some type of collective government advocacy.**

**Still, explicit outcomes from platform advocacy are impossible to directly identify** due to other political and economic factors.

Examples of platform advocacy, primarily achieved through sub-groups (e.g., Task Forces, Working Groups), include:

- Publishing position statements engaging in letter-writing campaigns
- Evaluating RFMOs' progress in implementing best practice recommendations
- Providing data and/or recommendations directly to government officials

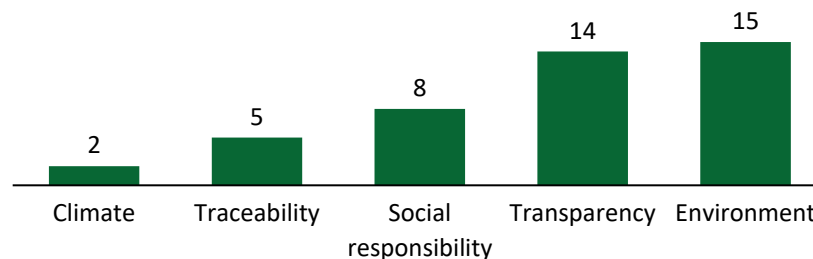
**Effective platform cross-collaboration occurs in different ways, from informal calls and connections to formal engagements, MOUs, and membership.**

On average, a platform informally or formally collaborates with 4 other platforms reviewed in this study. A key outcome of successful cross-collaboration and engagement is joint government advocacy statements such as the [February 2021 Statement on Traceability and Port State Measures](#) supported by GTA, ISSF, SeaBOS, GDST, and GSSI.

### Other identified trends:

- Over 50 NGOs advise and support platforms formally and informally.
- 5 platforms use industry chairs to promote industry direction-setting and engagement on platform goals, activities, and progress.
- Several platforms affirm the importance of the initial 'Code' drafting process, as it helps members co-develop priorities and align with each other.
- The following chart plots platforms' engagement by issue area: environmental sustainability, transparency, social responsibility, traceability, and climate change.
- Across all 16 platforms, membership skews toward North American and European-based companies.

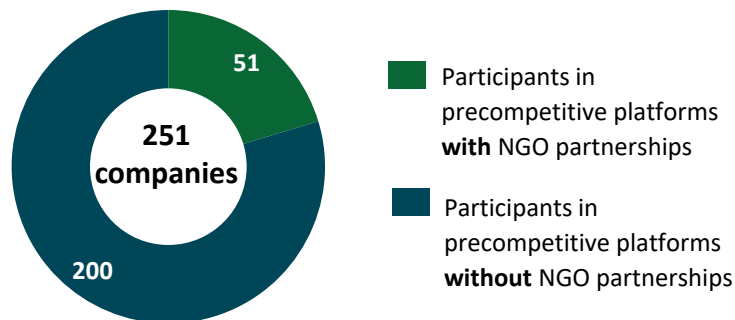
Platform-recognized focus areas



## Only 15% of participants in precompetitive collaborations also have 1:1 partnerships with Conservation Alliance NGOs

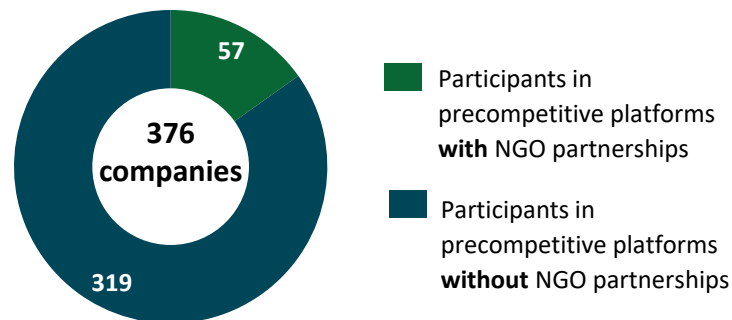
### 2018 High-Level Findings

251 companies engaged in 12 precompetitive platforms in 2018



### 2021 High-Level Findings

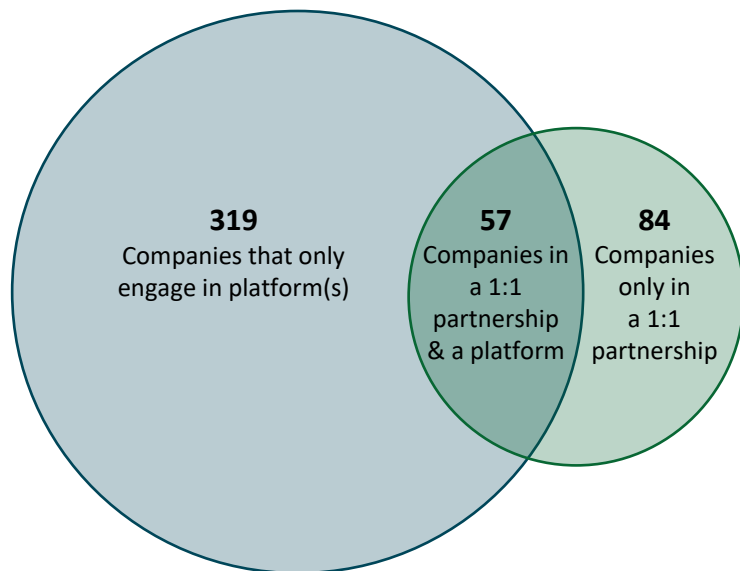
376 companies engaged in 15 precompetitive platforms in 2021<sup>1</sup>



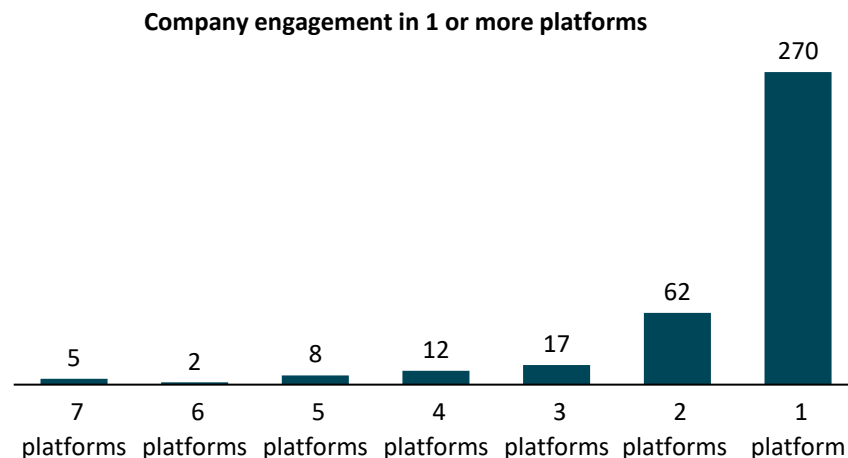
<sup>1</sup> Food Service Roundtable membership is private and was excluded from this analysis.  
Note: this analysis considered subsidiaries and parent companies as separate entities.

## 28% of companies participate in more than one platform, and 40% of companies with 1:1 NGO partnerships still engage with platforms

CEA tracks 141 1-on-1 NGO-company partnerships biannually, as reported in [Progress Toward Sustainable Seafood – By the Numbers \(June 2020\)](#). Of all the companies that have NGO partnerships, 40% (57 of 141) of companies also participate in precompetitive collaborations.

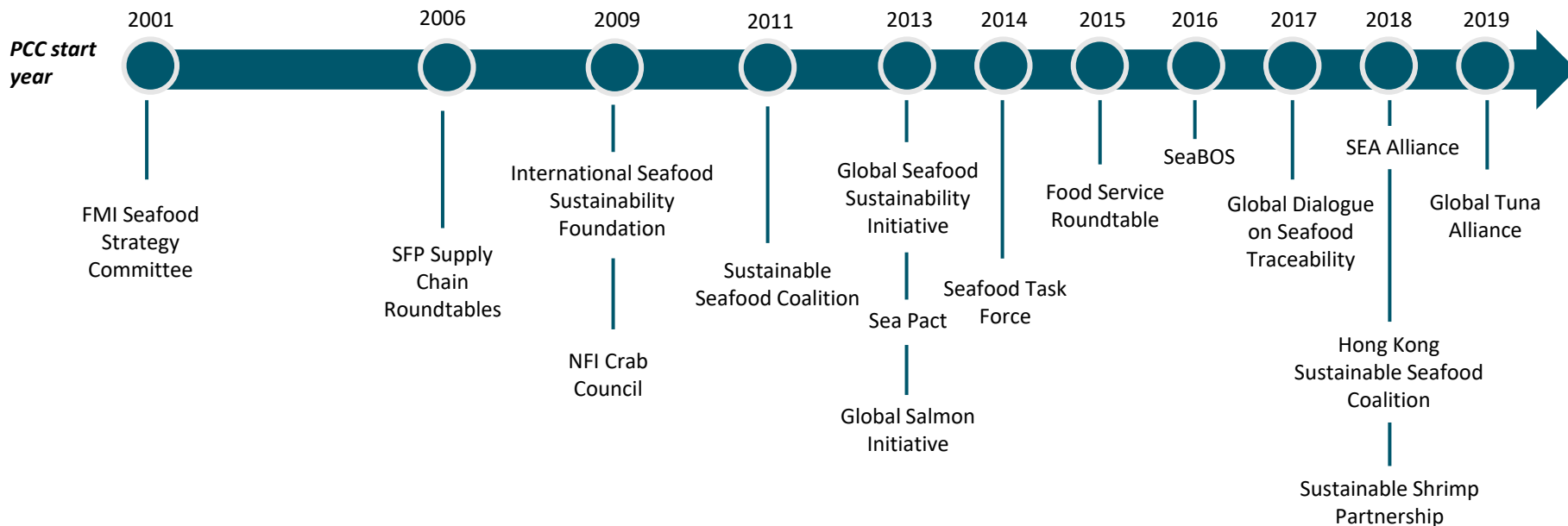


**28% (106 of 376) of companies engaged in the 16 precompetitive platforms CEA analyzed are engaged in more than one platform.**<sup>1</sup> This indicates a 6% increase from the 2018 report (22% of engaged companies were engaged in more than 1 platform).



<sup>1</sup> Food Service Roundtable membership is private and was excluded from this analysis.  
Note: this analysis considered subsidiaries and parent companies as separate entities.

## Precompetitive collaborations established from 2001-2019<sup>1</sup>



<sup>1</sup> This timeline only includes the 16 platforms CEA reviewed in this report.

## Platforms at a glance

Precompetitive Collaboration	Start Year	# of Participating Companies	Funding Model	Supply Chain Segment(s)
FMI Seafood Strategy Committee	2001	22	Member supported	Retailers, suppliers
Food Service Roundtable <sup>1</sup>	2015	N/A	Philanthropically supported	Foodservice, hospitality, restaurants, suppliers
Global Dialogue on Seafood Traceability	2017	85	Philanthropically supported	Distributors, retailers, suppliers
Global Salmon Initiative	2013	13	Member supported	Feed and pharmaceutical companies, producers
Global Sustainable Seafood Initiative	2013	75	Member supported	Foodservice, hospitality, producers, retailers, suppliers
Global Tuna Alliance	2019	27	Member and philanthropically supported	Retailers, suppliers
Hong Kong Sustainable Seafood Coalition	2018	15	Philanthropically supported	Hotels, retailers, suppliers
International Seafood Sustainability Foundation	2009	26	Member supported	Marketers, processors, traders
NFI Crab Council	2009	36	Member supported	Distributors, retailers, suppliers
Seafood Ethics Action Alliance	2018	26	Philanthropically supported	Processors, retailers, suppliers
Sea Pact	2013	10	Member and philanthropically supported	Distributors, suppliers
Seafood Business for Ocean Stewardship	2016	10	Member and philanthropically supported	Producers
Seafood Task Force	2014	29	Member and philanthropically supported	Processors, producers, retailers, suppliers
Sustainable Fisheries Partnership Supply Chain Roundtables <sup>2</sup>	2006	104	Member and philanthropically supported	Processors, producers, retailers, suppliers
Sustainable Seafood Coalition	2011	45	Member and philanthropically supported	Foodservice, retailers, suppliers
Sustainable Shrimp Partnership	2018	7	Member and philanthropically supported	Producers

<sup>1</sup> Food Service Roundtable membership is private.

<sup>2</sup> The Sustainable Fisheries Partnership Supply Chain Roundtables have 104 *unique* members and 154 *total* members across nine roundtables.

## Platforms at a glance (continued)

Precompetitive Collaboration	Corporate Location <sup>1</sup>	Focus Area(s)	Commodities
FMI Seafood Strategy Committee	North America	Environment, transparency	All seafood
Food Service Roundtable	North America	Environment, transparency	All seafood
Global Dialogue on Seafood Traceability	Global	Traceability, transparency	All seafood
Global Salmon Initiative	Global	Climate, environment, social responsibility, transparency	Farmed salmon
Global Sustainable Seafood Initiative	Global	Environment, social responsibility, transparency	All seafood
Global Tuna Alliance	Global	Environment, social responsibility, traceability, transparency	Tuna
Hong Kong Sustainable Seafood Coalition	Asia-Pacific	Environment, transparency	All seafood
International Seafood Sustainability Foundation	Global	Environment, social responsibility, transparency	Tuna
NFI Crab Council	U.S.	Environment, transparency	Blue Swimming Crab
Seafood Ethics Action Alliance	U.K.	Social responsibility	All seafood
Sea Pact	North America	Environment, social responsibility, transparency	All seafood
Seafood Business for Ocean Stewardship	Global	Climate, environment, social responsibility, transparency	All seafood
Seafood Task Force	Global	Environment, social responsibility, transparency	All seafood
Sustainable Fisheries Partnership Supply Chain Roundtables	Global	Environment	Octopus, farmed shrimp, fresh shrimp, snapper/grouper, mahi, squid, tuna
Sustainable Seafood Coalition	U.K.	Environment, transparency	All seafood
Sustainable Shrimp Partnership	Ecuador	Environment, traceability, transparency	Farmed shrimp

<sup>1</sup> Corporate location refers to where the engaged companies are located/headquartered, *not* where they seek to influence.

## Four non-exclusive platform archetypes emerge from the landscape

		Description	Example Platform(s)
Platform Type	Knowledge-sharing entities <sup>1</sup>	<ul style="list-style-type: none"> <li>Emphasize education, advising, and thought-partnership</li> <li>Inform engaged companies of upcoming initiatives/research in the sustainable seafood space</li> <li>Provide individual and group consultations for engaged companies to form and revise sustainable sourcing policies</li> </ul>	<ul style="list-style-type: none"> <li>FMI Seafood Strategy Committee</li> <li>Food Service Roundtable</li> <li>SEA Alliance</li> </ul>
	Commitment-oriented platforms	<ul style="list-style-type: none"> <li>Set time-bound and/or open-ended commitments</li> <li>Evaluate the progress of engaged companies individually or in aggregate against the commitments</li> <li>Provide resources and support to help engaged members meet their commitments</li> <li>Use accountability mechanisms to support/enforce compliance with commitments</li> </ul>	<ul style="list-style-type: none"> <li>GDST</li> <li>GTA</li> <li>GSI</li> <li>HKSSC</li> <li>ISSF</li> <li>Seafood Task Force</li> <li>SSC</li> <li>SSP</li> </ul>
	Scientific research bodies	<ul style="list-style-type: none"> <li>Collect data and produce outputs for the platform and wider community</li> <li>Collaborate with NGOs and academic institutions to conduct and disseminate research</li> </ul>	<ul style="list-style-type: none"> <li>ISSF</li> <li>SeaBOS</li> </ul>
	Project funders	<ul style="list-style-type: none"> <li>Fund projects on the water to improve sustainable seafood practices (e.g., AIPs, FIPs)</li> </ul>	<ul style="list-style-type: none"> <li>NFI Crab Council</li> <li>Sea Pact</li> <li>SFP SRs</li> </ul>

<sup>1</sup> To some degree, all surveyed platforms serve as a knowledge-sharing hub.

<sup>2</sup> Platform archetypes are not mutually exclusive; it is common for platforms to exhibit more than one type of archetype.



## 55 NGOs advise and support platforms<sup>1</sup>

		Selected NGOs									
Platforms		ASC	FishChoice	FishWise	GAA	IDH	MBAq Seafood Watch	MSC	Ocean Outcomes	SFP	WWF
	FMI Seafood Strategy Committee	X		X	X			X		X	
	Food Service Roundtable						X				
	GDST										X
	GSI	X			X						X
	GSSI		X			X	X		X		X
	ISSF			X			X	X		X	X
	NFI Crab Council									X	X
	SEA Alliance		X	X				X		X	X
	Sea Pact								X	X	
	SeaBOS			X						X	
	Seafood Task Force	X		X	X	X		X		X	X
	SFP Supply Chain Roundtable									X	
	Sustainable Shrimp Partnership					X					X

<sup>1</sup> 85 non-industry organizations are engaged in precompetitive collaborations, of which 53 are NGOs. In this table, NGOs are identified that engage as informal advisors to full members with more than one platform. GTA, HKSSC, and SSC are not included because they do not formally engage with the selected NGOs.

## Section 3

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# Platform Overviews

FMI Seafood Strategy Committee (p. 19)

Food Service Roundtable (p. 21)

Global Dialogue on Seafood Traceability (p. 23)

Global Salmon Initiative (p. 25)

Global Sustainable Seafood Initiative (p. 27)

Global Tuna Alliance (p. 29)

Hong Kong Sustainable Seafood Coalition (p. 31)

International Seafood Sustainability Foundation (p. 33)

NFI Crab Council (p. 35)

Seafood Ethics Action Alliance (p. 37)

Sea Pact (p. 39)

Seafood Business for Ocean Stewardship (p. 41)

Seafood Task Force (p. 43)

Sustainable Fisheries Partnership Supply Chain Roundtables (p. 45)

Sustainable Seafood Coalition (p. 48)

Sustainable Shrimp Partnership (p. 50)

## FMI Seafood Strategy Committee

### Mission and Objective

**Launched in 2001, the FMI Seafood Strategy Committee is an industry-led platform of retailers and wholesalers that aims to promote sustainable seafood supply chains through knowledge-sharing and education.** The Seafood Strategy Leadership Council is a larger group of actors in the seafood sector, including suppliers, partners, and third-party providers, in addition to retailers and wholesalers.

### Platform Commitments, Focus Areas, and Workplan

**The Committee hosts monthly discussions on a variety of topics in the sustainable seafood sector.** Past topics have included:

- Social responsibility
- Aquaculture
- Traceability
- Transparency
- Health and wellbeing

The Committee also provides members with educational materials and information to guide more sustainable seafood sourcing decisions. FMI also has a broader Sustainability Committee that addresses climate issues, energy, food waste, and packaging across commodities.

### Platform at a Glance

Start year	2001
Number of participating companies	22
Supply chain segment	Retailers, suppliers
Non-industry partners	ASC, BBRSDA, FishStandard, FishWise, GSA, GLOBALG.A.P, MSC, NFI, NOAA, SFP, SNP
Corporate location	North America
Commodities covered	All seafood
Platform focus areas	Environment, social responsibility, transparency
Engagement with other PCCs	ISSF
Platform leader & website	Rick Stein, VP of Fresh Foods; <a href="#">Committee: Seafood Strategy</a> <a href="#">Committee: FMI</a>

## FMI Seafood Strategy Committee

### Recent Results and Impact

FMI recently published its [2021 Power of Seafood](#) report which details consumer behavior and attitudes towards the seafood industry. Key sustainability findings include:

- 41% of seafood consumers say sustainable seafood certifications affect their purchasing decisions
- 71% of seafood consumers want to be more knowledgeable about seafood sustainability

### Financial Contributions and Business Model

FMI uses a four-tiered membership structure, partially based on sales volume, to determine members' annual contributions.

Members of the Seafood Strategy Leadership Council are required to join the 'Associate' level or above.

### Monitoring and Reporting

FMI does not currently publish public updates on progress monitoring and reporting.

### Government Advocacy

FMI's government advocacy efforts focus on advancing policy across the food retail sector. The platform has a government relations team with registered lobbyists to lobby federal policymakers. In parallel, FMI also uses state food associations to drive food policy at the state and local levels. The Seafood Strategy Leadership Council does not lobby.

### A Platform Highlight: Preventing Seafood Fraud in New York

In 2017, FMI released a whitepaper entitled, "[Best Practices on How to Mitigate the Risk of Seafood Fraud](#)" to mitigate the risk of seafood fraud through product specification and verification practices. The paper names several best practices for retailers and buyers, including requiring traceability through the supply chain, developing product specifications, and using third-party audits to verify product labelling.

The paper was later cited in the New York State Attorney's 2018 report, "[Fishy Business: Seafood Fraud and Mislabeling in New York State Supermarkets](#)," which found that two-thirds of the supermarket brands under review had at least one instance of suspected mislabeling.

## Food Service Roundtable

### Mission and Objective

**Established in 2015, the Food Service Roundtable is a precompetitive platform that leverages the collective influence of the foodservice industry to promote fisheries policy and management improvements.** The platform primarily supports knowledge sharing and operates privately.

### Platform Commitments, Focus Areas, and Workplan

**The intent of the platform is to connect aligned members to other initiatives where available, or to develop workstreams to help achieve goals identified as applicable among certain participants.**

Participating companies are not required to publicly commit to specific actions identified during the roundtable.

Primary areas of focus include:

- Supporting environment performance of key commodities (shrimp, tuna, salmon)
- Improving supply chain transparency
- Improving commitments to incorporate social responsibility
- Educating on topics such as plastics and antibiotic use in aquaculture

### Platform at a Glance

Start year	2015
Number of participating companies	N/A <sup>1</sup>
Supply chain segment	Foodservice, hospitality, restaurants, suppliers
Non-industry partners	Monterey Bay Aquarium Seafood Watch
Corporate location	North America
Commodities covered	All seafood (emphasis on tuna, shrimp, and farmed salmon)
Platform focus areas	Environment, transparency
Engagement with other PCCs	GDST, GSSI, ISSF, NFI Crab Council, Sea Pact, SFP Supply Chain Roundtable
Platform leader & website	Shawn Cronin, Manager of Market Engagement, MBAq; N/A

## Food Service Roundtable

### Recent Results and Impact

As primarily a knowledge sharing platform, the Food Service Roundtable has helped launch community initiatives. It helped catalyze the [NGO Tuna Forum](#), which brings together organizations that work comprehensively on global tuna sustainability. In 2018, the Roundtable also helped launch the [Seafood Slavery Risk Tool](#), a risk indicator tool that provides knowledge based on professional assessments from the fishing industry, civil society, and the anti-modern slavery community.

### Financial Contributions and Business Model

**Food Service Roundtable participating companies are not required to financially contribute to the platform.**

### Monitoring and Reporting

**The platform does not currently report on progress publicly.**

### Government Advocacy

**The platform does not collectively engage in government advocacy to improve fisheries but does advise and activate participating companies to do so, where applicable (e.g., RFMO-level engagement).**

### A Platform Highlight: Partnership Assurance Model

Food Service Roundtable Participating Companies engaged in the development of the Partnership Assurance Model. Developed initiatives are structured using [Partnership Assurance Model](#), which aims to accelerate sustainable improvement and sourcing. Projects bring together the entire supply chain, including: local and national governments and NGOs, technology providers, fishers, and farmers in a specific production region, and committed end buyers to co-design, implement, and verify environment improvements throughout the production process. Currently, projects take place in Chile, India, the Philippines, and Vietnam.

The Partnership Assurance Model includes four key elements:

1. Committed multi-stakeholder involvement
2. Global sustainability goals localized to an area
3. Credible and fit-for-purpose verification
4. Supported area-based improvement

# Global Dialogue on Seafood Traceability (GDST)

## Mission and Objective

Borne from seafood traceability workshops across Asia, Europe, and North America, GDST is a business-to-business platform that brings together a broad spectrum of seafood stakeholders to develop and promote a unified framework for interoperable seafood traceability. The Dialogue receives operational and technical support from WWF.

## Platform Commitments, Focus Areas, and Workplan

Upon joining, GDST members adopt the GDST 1.0, [a public statement](#) announcing that GDST 1.0 should be accepted as the global industry standard for seafood traceability.

The Dialogue is based on four key pillars of global seafood traceability:

- Tracking agreed upon key data elements throughout the supply chain
- Setting specifications for traceability systems and information exchanges
- Implementing benchmarks for verifying data validity
- Aligning national regulations to reduce compliance costs

The [GDST Core Normative Standards](#) outline the requirements supply chains and businesses must satisfy in order to be considered GDST-compliant.

## Platform at a Glance

Start year	2017
Number of participating companies	85
Supply chain segment	Distributors, retailers, suppliers
Non-industry partners	Institute of Food Technologists (Global Food Traceability Center), WWF
Corporate location	Global
Commodities covered	All seafood
Platform focus areas	Traceability, transparency
Engagement with other PCCs	ISSF, GTA, GSSI, SEA Alliance, SeaBOS, Sea Pact, SSC
Platform leader & website	David Schorr, Co-Chair; <a href="https://traceability-dialogue.org">https://traceability-dialogue.org</a>

# Global Dialogue on Seafood Traceability (GDST)

## Recent Results and Impact

**Released in March 2020, the GDST Standards and Guidelines for Interoperable Seafood Traceability Systems (v1.0) comprises two main principles:**

1. Standards identifying the key data elements that need to be documented and transmitted within GDST-compliant seafood supply chains
2. Standards that govern the norms and infrastructure for sharing data between interoperable traceability systems

In collaboration with GS1 US and other GDST 1.0 adopters, the Dialogue recently released [a seafood industry traceability pilot study](#) on interoperable seafood traceability systems. In March 2020, the Dialogue hosted [an interoperability implementation exercise](#) for traceability solution providers.

## Financial Contributions and Business Model

**Most past and current costs incurred by GDST-related activities have been covered by philanthropic support.**

## Government Advocacy

**GDST collaborates with other precompetitive collaborations to produce and release joint position statements, including the February 2021 [Statement on Traceability and Port State Measures](#).**

## Monitoring and Reporting

**The Dialogue does not currently have a mechanism to independently verify the validity of claims made about GDST 1.0 implementation or compliance.** In addition, GDST does not currently publish an annual impact report.

## A Platform Highlight: Piloting GDST 1.0

Shortly after unveiling the GDST 1.0 Standards, the Dialogue released resources to facilitate the implementation of interoperable seafood traceability systems. [The Implementation Roadmap and Toolkit](#) informs companies of the benefits and challenges associated with adopting the 1.0 standards. The [Implementation Metrics Rubric](#) offers adopters a quantitative framework to assess their progress against GDST 1.0 standards.

The GDST has also executed several pilot programs to accomplish interoperable sharing, including in the following supply chains:

- [CP Foods Aquaculture Shrimp](#)
- [Giant Tiger Prawn \(from Vietnam to the UK\)](#)
- [Farmed Chinook Salmon](#)
- [178 Degrees Mt. Cook Alpine Salmon](#)



## Global Salmon Initiative (GSI)

### Mission and Objective

Established in 2013, GSI aims to provide a knowledge-sharing platform and foster the development of advanced farming approaches to drive sustainability progress in the global farmed salmon industry. As of 2021, the GSI comprises 21 member companies representing approximately 40% of the global farmed salmon sector.

### Platform Commitments, Focus Areas, and Workplan

All GSI members commit to working towards [100% ASC certification](#), providing audited data for the [GSI Annual Sustainability Report](#), and playing an active role in the taskforce working areas to improve farming practices. Other activities include the development of an industry-wide climate reporting framework, mitigation efforts with WWF, and the refinement of social indicators for salmon farming through ASC.

### Platform at a Glance

Start year	2013
Number of participating companies	13 (8 associate members)
Supply chain segment	Producers, feed and pharmaceutical companies
Non-industry partners	ASC, AQS, Friends of Ocean Action, FAO-UN, GAA, IFFO, Ocean Panel, UN Food Systems Summit, WWF
Corporate location	Global
Commodities covered	Farmed salmon
Platform focus areas	Climate, environment, social responsibility, transparency
Engagement with other PCCs	SeaBOS, SSP
Platform leader & website	Sophie Ryan, CEO; <a href="https://globalsalmoninitiative.org/en/">https://globalsalmoninitiative.org/en/</a>

# Global Salmon Initiative (GSI)

## Recent Results and Impact

As of July 2021, **65% of total GSI members' production** is at 100% ASC Certification. The Initiative's CEO, Sophie Ryan, also noted a high level of membership engagement – it is usual to have ~90-95% attendance in GSI meetings in the past year.

The public dashboard also reported:

- 219 GSI farms have achieved ASC certification
- 60 GSI farms are currently in assessment
- An estimated 622,204 tonnes of salmon produced by GSI members has been ASC certified in the last 12 months
- A 60% reduction on average in the use of antibiotics since 2013;
- A 50% reduction on average in medicinal use
- An 11% decrease of marine ingredients in fish oil and 40% in fish meal since 2013

## Financial Contributions and Business Model

GSI is funded by industry and associate members. Industry members pay an annual base fee and a % share based on volume, with the largest company paying ~\$234,100 (€200,000). Associate members (feed and pharmaceutical companies) pay a lower set base fee.

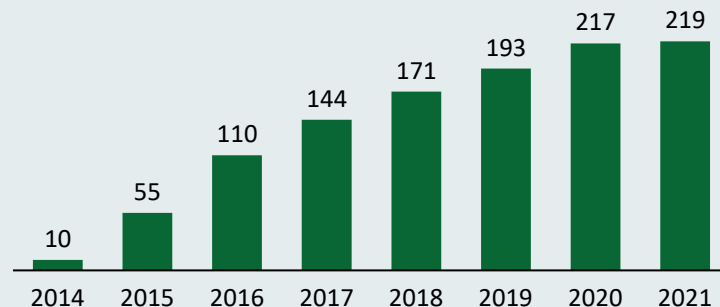
## Government Advocacy

While GSI does not have a formal government advocacy program, it does engage on key opportunities and has held briefings with the Chilean and Norwegian fisheries ministries.

## Monitoring and Reporting

Individual members are encouraged to set targets and showcase their progress. GSI gathers audited data from members and releases an annual public dashboard (the "[Sustainability Report](#)") that monitors membership progress.

## A Platform Highlight: Number of GSI farms ASC certified



## Global Sustainable Seafood Initiative (GSSI)

### Mission and Objective

**Founded in 2013, the GSSI is a global, pre-competitive collaboration that aims to align global efforts and resources to promote a more sustainable seafood industry.** As part of its mission GSSI has developed the [Global Benchmark Tool](#), which seeks to provide confidence in certified seafood and promote improvement in certification schemes.

### Platform Commitments, Focus Areas, and Workplan

**GSSI Funding Partners sign the [GSSI Code of Conduct](#) to directly participate in the development and promotion of the Global Benchmark Tool.** Partners also commit to abide by the rules of governance and policies within the GSSI Charter.

**As part of its 2022-2024 strategic planning, GSSI aims to:**

- Continue delivering confidence and clarity on certification models via a refined version 2.0 of its Global Benchmark Tool
- Promote the implementation of the [Social Compliance Benchmark tool](#), jointly developed with the Sustainable Supply Chain Initiative
- Develop [Seafood MAP](#), a globally inclusive platform to compile and accelerate sustainable fisheries and aquaculture efforts
- Mobilize the GSSI Global Partnership to accelerate efforts that contribute to implementation of Agenda 2030 and the SDGs

### Platform at a Glance

Start year	2013
Number of participating companies	75
Supply chain segment	Foodservice, hospitality, producers, retailers, suppliers
Non-industry partners	ASIC, CAPPMA, CeDePesca, China Blue Sustainability Institute, Ethic Ocean, FAO, FishChoice, GIZ, IDH, Monterey Bay Aquarium, New England Aquarium, Ocean Outcomes, Thunen, WWF
Corporate location	Global
Commodities covered	All seafood
Platform focus areas	Environment, social responsibility, transparency
Engagement with other PCCs	GDST, GTA, ISSF, SeaBOS
Platform leader & website	Herman Wisse, Executive Director; <a href="https://www.ourgssi.org">https://www.ourgssi.org</a>

# Global Sustainable Seafood Initiative (GSSI)

## Recent Results and Impact

As of 2021, GSSI has recognized [nine seafood certification schemes](#), an increase from two recognized schemes in 2016. GSSI also has finalized the [Global Benchmark Tool Framework v2.0](#) with a launch of Global Benchmark Tool v2.0 planned for Q4 2020. In 2021 GSSI, together with SSCI, launched the [seafood specific Social Compliance Benchmark Tool](#) and, in partnership with IDH, create a [Seafood MAP Task Force](#) in 2021, to develop the Seafood MAP platform to help non-certified fishers and aquaculture meet the growing demand for sustainable seafood.

## Financial Contributions and Business Model

**GSSI is funded through Partners' financial contributions; all Funding Partners are required to pay an annual fee.** Though, some have helped fund GSSI projects, Affiliated Partners are not required to financially contribute.

## Monitoring and Reporting

The GSSI Steering Board discusses and approves the platform's goals; the GSSI Secretariat reports progress on these goals directly to the Steering Board. **Progress summaries are published in the [GSSI Annual Report](#), most recently in 2019.** GSSI also produces regular [Monitoring of Continued Alignment \(MOCA\) reports](#) for each individual certification scheme that has achieved formal GSSI Recognition.

## Government Advocacy

**GSSI conducts government advocacy efforts in the following ways:**

- Participating and intervening on behalf of its partners [at FAO Committee on Fisheries meetings](#)
- Mobilizing its Partners to support collaborative advocacy efforts such as the [WCPO Tuna Call to Action](#)
- Collaborating with other precompetitive platforms through joint position statements such as the [Statement on Traceability and Port State Measures](#)
- Offering guidance to governments who are developing national or regional ecolabels

## A Platform Highlight: GSSI's partnership with the FAO

GSSI collaborates with the FAO to operationalize its Codes and Guidelines and provide a common language for the seafood sector to help accelerate and amplify its efforts to meet the growing demand for more sustainable seafood. For example, the Global Benchmark Tool is underpinned by the FAO's [Code of Conduct for Responsible Fisheries](#) and [Ecolabelling Guidelines](#) and for its seafood specific social-compliance benchmark tool, GSSI has drawn on ILO Conventions and Recommendations, UN Guiding Principles, and the FAO's guidance on socially responsible seafood supply chains.

## Global Tuna Alliance (GTA)

### Mission and Objective

**GTA is an independent group of retailers and supply-chain companies that work to improve the environment performance and social responsibility of global tuna fisheries.** Members work collaboratively to support harvest strategies, engage on illegal, unreported, and unregulated products, improve traceability and environment sustainability, and advance work on human rights in tuna fisheries.

### Platform Commitments, Focus Areas, and Workplan

**GTA Partners commit to [the 5-Year Strategy](#) through 2025 and engage in work programs through either direct country engagement or supply chain improvements.** The former is achieved collectively and through complete individual actions. GTA is co-convening the [2025 Pledge Towards Sustainable Tuna \(25PST\)](#) with the World Economic Forum and Friends of Ocean Action.

### Platform at a Glance

Start year	2019
Number of participating companies	27
Supply chain segment	Retailers, suppliers
Non-industry partners	NGO Tuna Forum
Corporate location	Global
Commodities covered	Tuna
Platform focus areas	Environment, social responsibility, traceability, transparency
Engagement with other PCCs	GDST, GSSI, ISSF, SEA Alliance
Platform leader & website	Tom Pickerell, Executive Director; <a href="https://www.globaltunaalliance.com">https://www.globaltunaalliance.com</a>

## Global Tuna Alliance (GTA)

### Recent Results and Impact

During 2019-20 and through a collaborative agreement with the World Economic Forum, the GTA implemented the objectives laid out in the Forum's Tuna 2020 Traceability Declaration.

### Financial Contributions and Business Model

GTA was originally funded by the World Economic Forum's Friends of Ocean Action Program. Currently, members are required to financially contribute ~\$8,780 (€7,500) annually. GTA also receives funding from the Walton Family Foundation.

### Government Advocacy

**GTA members commit to working with governments to ensure the implementation of effective harvest strategies and to establish systems to identify and restrict IUU seafood.** GTA members will:

1. Identify strategic engagement opportunities in relation to key RFMO member countries
2. Develop common position statements that can be used to communicate with governments, RFMOs, and supply chain stakeholders
3. Advocate for the ratification and implementation of Port State Measures Agreement, the ratification and implementation of ILO Work in Fishing Convention, and the implementation of the Global Record of Fishing Vessels

### Monitoring and Reporting

**Annual assessments of partners will be in line with the 5-Year Strategy; both partner dashboards and annual reports will be made public. Partner self-assessments will take place in 2021, 2022, 2024, with third-party audits in 2023 and 2025.**

GTA also currently collaborates with GDST and SEA Alliance by sharing key performance indicators.

### A Platform Highlight: Indian Ocean yellowfin tuna advocacy

In response to overfished yellowfin tuna stocks in the Indian Ocean, GTA commissioned a March 2021 [report](#) to inform and motivate Indian Ocean Tuna Commission (IOTC) decision-makers to reduce juvenile yellowfin tuna catch. The Alliance also published a June 2020 [Management Advice Report](#), which offered recommendations for yellowfin catch reduction. Individual members (i.e., Tesco, Princes, Co-Op, M&S) released social media and press announcements pledging to reduce or eliminate yellowfin sourcing. As a collective, GTA members (among other supply chain companies) issued a [joint position statement](#) in May 2021 calling on the IOTC to rebuild the yellowfin tuna stock. In June, the IOTC reached an agreement to limit yellowfin tuna catch in 2022 to 401,011 mt. The success of this agreement was likely due to members across the supply chain asking for adoption of stricter catch regulations.

## Hong Kong Sustainable Seafood Coalition (HKSSC)

### Mission and Objective

**Launched in 2018, the HKSSC promotes responsible sourcing and consumption with the goal of enhancing the sustainability of the Hong Kong seafood industry.** The platform aims to ensure that all seafood imports into Hong Kong are legal, traceable, and sustainable.

### Platform Commitments, Focus Areas, and Workplan

**In addition to [Voluntary Codes of Conduct](#), HKSSC members sign a Letter of Commitment which pledges them to (within the first 24 months of membership) outline the scope of a risk assessment of own-brand or private label seafood.** Members are also encouraged to make their responsible sourcing policies public.

The HKSSC Steering Group determines the goals and working group areas annually, in consultation with the members. Currently, the Coalition has three main working groups:

- Marketplace
- Sustainability Risk Assessments
- Outreach and Communications

### Platform at a Glance

Start year	2018
Number of participating companies	15
Supply chain segment	Hotels, retailers, suppliers
Non-industry partners	ADM Capital Foundation, Teng Hoi Conservation Organization
Corporate location	Asia-Pacific
Commodities covered	All seafood
Platform focus areas	Environment, traceability, transparency
Engagement with other PCCs	SSC
Platform leader & website	Aaron Sloan, Elevate Ltd. Secretariat Jacqui Dixon, Technical Advisor; <a href="https://hksustainableseafoodcoalition.org">https://hksustainableseafoodcoalition.org</a>

## Hong Kong Sustainable Seafood Coalition (HKSSC)

### Recent Results and Impact

**HKSSC has developed programs to share knowledge on sustainable seafood supply chains.** In 2019, the HKSSC produced a data collection tool for members to collect, combine, and review supply chain risk assessment data. More recently, the Coalition has run a [series of public webinars](#) to help advance members' knowledge of social issues in seafood supply chains.

### Financial Contributions and Business Model

**Members are not required to financially contribute to the Coalition.** The Coalition has secured funding from the ADM Capital Foundation with support from Swire Trust through 2022. Member fees will likely be introduced in the 2022 calendar year.

### Monitoring and Reporting

**The HKSSC does not conduct public reporting. The Steering Committee reviews member progress towards the Letter of Commitment to determine general progress toward individual member goals.** While there is no public annual report, the HKSSC publishes meeting minutes from member meetings, Steering Committee Meetings, and Working Group Meetings. The Coalition also provides quarterly and annual reporting to ADM Capital Foundation.

### Government Advocacy

**The HKSSC is developing a relationship with the Hong Kong Aquaculture, Fisheries, and Conservation Department (AFCD) with the goals of sharing best practices and longer-term policy change.** Aside from supporting the Coalition in the Seafood Risk Assessment peer review process, the AFCD has also expressed an interest in supporting the Coalition to reach out to local farmers in Hong Kong for research into feed and seed and an educational capacity-building project. The HKSSC has plans to present trade flow research to other government departments to advise on seafood import policy.

### A Platform Highlight: The HKSSC's Seafood Risk Assessment

Launched in 2020, the HKSSC's [Seafood Risk Assessment](#) (SRA) project engaged with the Hong Kong Agriculture, Fisheries, and AFCD to build a sustainability profile on local farmed fish. This engagement has enabled the Coalition to refine and develop the AFCD's understanding of good aquaculture practices, specifically around concerns for seed and feed. In addition, the SRA serves as an open-source platform for Hong Kong-based companies to understand the key risk areas in the seafood sector and inform their sustainable sourcing decisions. The HKSSC is currently working on refining the SRA's methodology and capacity in collaboration with local academic institutions.



# International Seafood Sustainability Foundation (ISSF)

## Mission and Objective

**The ISSF is a 501(c)(3) non-profit environmental organization, in which tuna companies may participate by joining the affiliated trade association, International Seafood Sustainability Association (ISSA).** Participating companies advocate for improved fishery management, fund scientific advancements, and promote the adoption of responsible fishing practices with the long-term vision of healthy global tuna fisheries. ISSF's mission is to undertake and facilitate science initiatives for the long-term conservation and sustainable use of global tuna stocks, reducing bycatch, and promoting marine ecosystem health. ISSF supports RFMOs through advocacy for science-based management and scientific initiatives.

## Platform Commitments, Focus Areas, and Workplan

**Participating companies are required to comply with [ISSF Conservation Measures](#), and their compliance results are [publicly reported by ISSF](#).**

The platform's [2018-2022 Strategic Plan](#) focuses on three main areas:

1. Science: advancing the sustainability of tuna stocks and their ecosystem
2. Influence: leveraging the authority of stakeholders to promote healthy tuna stocks
3. Verification: credibly and transparently demonstrating compliance of participating companies and vessels

## Platform at a Glance

Start year	2009
Number of participating companies	26
Supply chain segment	Marketers, processors, traders
Non-industry partners	Azti, FAO, FishWise, IDR, MSC, Seafood Watch, RFMO science bodies, SFP, WWF, and other scientific research partners
Corporate location	Global
Commodities covered	Tuna
Platform focus areas	Environment, transparency
Engagement with other PCCs <sup>1</sup>	GDST, GSSI, GTA, Seafood Task Force
Platform leader & website	Susan Jackson, President; <a href="https://iss-foundation.org">https://iss-foundation.org</a>

Source: Desktop research; interview with Susan Jackson, July 21, 2021

<sup>1</sup> As a participant of the NGO Tuna Forum, ISSF serves on the Market Engagement and RFMO Advocacy Working Groups.

# International Seafood Sustainability Foundation (ISSF)

## Recent Results and Impact

ISSF produces [scientific publications and technical reports](#) to guide stakeholder engagement and data standardization. In collaboration with MSC and Fishery Progress, in 2020, ISSF launched the [Vessels in Other Sustainability Initiatives \(VOSI\)](#), a verified, public vessel list that enables users to identify vessels fishing in an MSC-fishery, participating in a tuna FIP, or both.

## Financial Contributions and Business Model

Tuna companies may participate in ISSF as either [Full Participating Companies](#) or [Associate Participating Companies](#).

- Full participating companies pay a one-time \$50,000 application fee and an annual dues between \$100,000 and \$600,000 depending on tuna revenue
- Associate participating companies pay a \$25,000 application fee and an annual flat dues of \$25,000
- [ISSF Data Check Companies](#) pay an annual due of \$6,000

Philanthropic contributions range yearly, from 20 – 40% of revenue.

## Government Advocacy

ISSF produces technical reports and [“snapshots” of RFMO progress](#) in adopting best practices of various elements of tuna fisheries management and compliance. For each RFMO Annual Meeting, the ISSF Board adopts [a position statement](#) and shares it with the wider tuna community.

## Monitoring and Reporting

Participating companies are subject to annual third-party audits to ensure compliance with ISSF’s Conservation Measures and Commitments. [Individual company audits](#) are available on the ISSF website.

ISSF released its [2021 Annual Conservation Measures & Commitments Compliance Report](#), which offers a high-level overview on member compliance. [ISSF’s annual report](#) provides a broader review of the organization’s work. The ISSF also publishes a [Status of the World Fisheries for Tuna report](#) and several [MSC benchmarking reviews](#), among other scientific reports.

## A Platform Highlight: ISSF-RFMO Engagement

In 2020, ISSF Participating Companies sent 660 letters to RFMO delegates across countries where the Companies have a presence.

- The average ISSF Participating Company sent 51 letters
- Inter-American Tropical Tuna Commission: 21 countries received a letter, representing 90% of Participating companies
- Ocean Tuna Commission: 31 countries received a letter, representing 61% of Participating Companies
- Western and Central Pacific Fisheries Commission: 26 countries received a letter, representing 85% of members

## NFI Crab Council

### Mission and Objective

**The NFI Crab Council is a group of U.S. seafood companies focused on blue swimming crab (BSC) sustainability.** By way of a self-imposed tax on imported BSC, Council members fund overseas crab sustainability projects with the goal of improving crab fisheries through scientific, economic, and social channels.

The ultimate objectives of the Council are to implement beneficial sourcing standards throughout the industry and improve the health of BSC fisheries globally.

### Platform Commitments, Focus Areas, and Workplans

**Members co-develop and agree to a set of sourcing policies for BSC, including: 10 cm minimum size, 3g jumbo lump minimum weight, no take of berried females, and no trawl-caught crabs.**

Members also commit to funding **BSC FIPs** currently operating in India, Indonesia, Philippines, Thailand, Vietnam, and Sri Lanka.

### Platform at a Glance

Start year	2009
Number of participating companies	36
Supply chain segment	Distributors, retailers, suppliers
Non-industry partners	50 in 10, SFP, The World Bank, WWF
Corporate location	U.S.
Commodities covered	Blue Swimming Crab
Platform focus areas	Environment, transparency
Engagement with other PCCs	Sea Pact, SFP Supply Chain Roundtable
Platform leader & website	Gavin Gibbons, Vice President, Communications at NFI; <a href="https://committedtocrab.org">https://committedtocrab.org</a>

## NFI Crab Council

### Recent Results and Impact

Currently, all 5 of the active BSC FIPs the Council funds have an “A” progress rating on Fishery Progress. The Council recently launched [a new BSC FIP in India](#) and expanded funding into a research project on BSC stock enhancement.

### Financial Contributions and Business Model

**The NFI Crab Council is funded entirely through a self-imposed tax on imported crab.** For BSC, members pay 3 cents quarterly per pound. These funds are used to support BSC FIPs in the five source countries.

### Monitoring and Reporting

**The Council does internal auditing of member companies to ensure compliance with the sourcing policies; third party auditors weigh the members’ canned products and identifies violations with minimum weight policies.** If a violation is found, the Council requests members to self-audit and address any variations in the weight of their cans. The Council also regularly reports on its FIPs on Fishery Progress.

### Government Advocacy

**NFI Crab Council does not have a formal government advocacy program. The Council utilizes in-country partners and FIP implementers to interface and engage with the government by sharing data and resources.** For example, the Council has shared its spawning potential ratio (SPR) data with the Indonesian Fisheries Authority. Additionally, the Philippine Association of Crab Processors (which manages the Philippines FIP), is working with the Philippine government to demonstrate the efficacy and cost-effectiveness of SPR as a stock assessment method.

### A Platform Highlight: The NFI Red Swimming Crab Council

Recently, the NFI Crab Council developed a Red Swimming Crab (RSC)-specific Council to develop sourcing guidelines and policies governing RSC. With some overlap in BSC-membership, the new RSC Crab Council hosts 10 member companies. Like its BSC counterpart, the RSC Crab Council is funded through a tax on RSC-imported crab; members pay 2 cents quarterly per pound. The Council plans to develop RSC-specific sourcing guidelines out of current research and data collection efforts.

In 2018, the Council launched the [Chinese RSC FIP](#) which supports the sustainable management of Chinese haanii crab, a fishery within the Fujian Province.

## Seafood Ethics Action Alliance (SEA Alliance)

### Mission and Objective

The SEA Alliance was recently established as a knowledge and resource-sharing platform for industry to respond to human and labor rights issues in UK and Ireland seafood supply chains and agree to best practice solutions. Through industry alignment and multi-stakeholder engagement with governments and RFMOs, the SEA Alliance aims to improve working environments for seafood workers throughout seafood supply chains.

### Platform Commitments, Focus Areas, and Workplans

The [SEA Alliance Workplan](#) has a high-level time frame (2030) with six priority workstreams:

1. Establishing SEA Alliance as the precompetitive collaboration focused on human rights in seafood supply chains
2. Aligning industry with human rights standards and due diligence processes
3. Co-developing tools to increase industry alignment and address human rights risks
4. Enabling industry members to identify and manage risks in fisheries they source from
5. Influencing through multistakeholder engagement
6. Facilitating collaboration to address risks at the fishery level

### Platform at a Glance

Start year	2018
Number of companies engaged	26
Supply chain segment	Processors, retailers, suppliers
Non-industry partners	EJF, ETI, FAO, FishChoice, FishWise, FNET, FWA, Human Rights at Sea, MSC, Oxfam, Pew Trusts, SFP, Stronger Together, WWF
Corporate location	U.K.
Commodities covered	All seafood
Platform focus areas	Social responsibility
Engagement with other PCCs	GDST, GTA, SSC
Platform leader & website	Karen Green, Seafish Secretariat; <a href="#">Seafood Ethics Action Alliance — Seafish</a>

## Seafood Ethics Action Alliance (SEA Alliance)

### Recent Results and Impact

**The SEA Alliance plans to convene a Strategic Advisory Group to identify the most effective governance model.** The Alliance also will develop and implement due diligence principles and produce collaborative guidance and risk assessment tools. Currently, the Alliance is developing a small-scale fund to pilot a collaborative model for addressing human rights issues in fisheries (“Change on the Water Fund”).

### Financial Contributions and Business Model

**Currently, members are not required to financially contribute to the platform.** In May 2021, the SEA Alliance received funding from the Packard Foundation which will enable the Alliance to develop and expand operations. In addition, the Alliance benefits from in-kind contributions from members.

### Monitoring and Reporting

**The SEA Alliance plans to publish an annual impact report, including an outline of the SEA Alliance governance structure.** The Alliance also plans to conduct an independent evaluation of impact and release recommendations to facilitate industry alignment. There are also plans to conduct and release annual SEA Alliance participant surveys.

### Government Advocacy

**As part of its workplan, the SEA Alliance engages with key stakeholders such as governments and RFMOs on issues affecting human rights in the seafood industry supply chain.** Some examples of multi-stakeholder engagement initiatives include:

- Submitting a multi-stakeholder request to the EU to make labor rights a precondition of resuming Thai trade negotiations (October 2020)
- Signing a joint letter to urge the Thai government to ratify the ILO Work in Fishing Convention C188 (August 2018)

### A Platform Highlight: Letter to the Taiwanese Fishery Agency

The US Department of Labor listed fish caught by the Taiwanese-flagged Distant Water Fleet (DWF) as “goods produced by forced labor.” In March 2021, the SEA Alliance sent a letter to the Taiwanese Fisheries Agency to request the uptake of good governance and transparency measures in their DWF. The following month, the Alliance received a reply from the General Director of the Fisheries Agency in which the Agency reaffirmed its commitment to sustainable and socially responsible fishery management.

## Sea Pact

### Mission and Objective

**Sea Pact is a group of ten leading North American seafood companies dedicated to improving social, economic, and environmental responsibility throughout the global seafood supply chain.** Sea Pact's vision is a vibrant and resilient industry in which all seafood is produced, traded, and consumed responsibly.

### Platform Commitments, Focus Areas, and Workplan

**All Sea Pact member companies have a responsible sourcing commitment, as required by the member criteria, and commit to [eight collective agreements](#).** Sea Pact selects and funds projects across broad [project categories](#) with the goal of advancing sustainable fisheries and responsible aquaculture practices and driving improvements across the seafood industry. To date, Sea Pact has provided 33 grants to 26 projects in 13 countries, over \$650K USD in direct support, and has helped generate over \$1.25M additional project funds.

#### Sea Pact has four core strategic areas:

1. Sea Pact Responsible Sourcing Action Plan
2. Industry engagement in SFP supply chain roundtables and building awareness and support for the Target 75 initiative
3. Aquaculture: Education and North American aquaculture advocacy
4. Accelerating work on social responsibility integration across the seafood supply chain

### Platform at a Glance

Start year	2013
Number of participating companies	10
Supply chain segment	Distributors, suppliers
Non-industry partners	FishWise, Multiplier, Ocean Outcomes, SFP
Corporate location	North America
Commodities covered	All seafood
Platform focus areas	Environment, social responsibility, traceability, transparency
Engagement with other PCCs	FMI Seafood Strategy Committee, GDST, GSSI, GTA, SEA Alliance, SeaBOS, SFP Supply Chain Roundtables, SSC
Platform leader & website	Rob Johnson, Managing Director; <a href="#">SEA PACT - Sea Pact   Sustainable Seafood   United for a Sustainable Future</a>

## Sea Pact

### Monitoring and Reporting

**The platform's MEL process is based on internal quarterly progress reports and the annual workplan review.** Currently, Sea Pact relies on more qualitative data and thought partnership with Seafood2030 to guide its monitoring efforts. Sea Pact will publish its first annual impact report in 2022.

### Financial Contributions and Business Model

**All Sea Pact members are required to pay flat annual membership dues.** The platform also received donations for FIPs through its Retail Sponsorship program. Sea Pact also receives philanthropic support from the Packard Foundation and Walton Family Foundation.

### Government Advocacy

**Sea Pact drives both collective and individual-member government advocacy for effective fisheries and aquaculture policies.** Recent examples of Sea Pact advocacy engagement include:

- Publishing [a joint statement](#) with GDST on seafood traceability
- Submitting [comments to the USDA](#) regarding supply chains
- Producing a stronger America Through Seafood commissioned report entitled, "[Marine Aquaculture as a Tool for Climate Mitigation](#)"
- Drafting a [Multi-stakeholder letter](#) of request to President Biden to include aquaculture in climate and employment policy priorities
- Signing onto letters to tuna RFMOs advocating for policy change
- Supporting National Science Foundation traceability proposals

### Recent Results and Impact

**Sea Pact publishes an annual [infographic](#) of all selected projects and receives a final report and presentation from each project.** The platform has awarded over \$550,000 in 28 grants to 22 projects in 13 countries. Some of the funded projects include:

- Helping fisheries lower the risk of whale entanglement;
- Improving wild caught shrimp broodstock supply for aquaculture;
- Developing a rapid assessment protocol for socially responsible seafood

In addition, Sea Pact presented on industry-led precompetitive collaborations at a Japanese business workshop in partnership with Seafood Legacy, and at the first Latin American Seafood Sustainability Forum, in partnership with Comepesca.

### A Platform Highlight: The Sea Pact-GDST Joint Work Program

In September 2020, Sea Pact and GDST announced a [joint work program](#) to support the implementation of the GDST 1.0 Standards in Sea Pact's member practices. As part of the collaboration, the GDST secretariat works with Sea Pact members to provide technical guidance on implementing GDST standards. Sea Pact members have vowed to use their collective voice to encourage industry-wide adoption of GDST 1.0 standards and collection of key data elements to facilitate a traceable seafood supply chain.



## Seafood Business for Ocean Stewardship (SeaBOS)

### Mission and Objective

**Launched in 2016, SeaBOS aims to shape sustainable seafood production by facilitating collaboration between seafood companies across the wild capture, aquaculture, and feed production sectors in partnership with the Stockholm Resilience Centre, University of Lancaster, and the Stanford Center for Ocean Solutions.** The platform incorporates 10 of the world's largest seafood businesses, with over 600 subsidiary companies, and represents over 10% of the world's seafood production.

### Platform Commitments, Focus Areas, and Workplan

**SeaBOS members [released a workplan for 2021](#), which aims to eliminate IUU fishing and forced labor in member operations, extend collaboration with the [Global Ghost Gear Initiative](#), co-develop a strategy to reduce business impacts on endangered species, and set CO2 emissions reduction goals and reporting standards.**

**In addition, SeaBOS has six Task Forces to operationalize the following priority areas:**

1. IUU, endangered species, and forced labor
2. Global seafood traceability communications
3. Government and regulatory affairs
4. Transparency and governance of SeaBOS
5. Ocean plastics mitigation
6. Climate resilience

### Platform at a Glance

Start year	2016
Number of companies engaged	10
Supply chain segment	Producers
Non-industry partners	Beijer Institute of Ecological Economics, EDF, GGGI, HLP, ICC, SFP, Stanford Center for Ocean Solutions, Stockholm Resilience Centre, University of Lancaster, UNGC
Corporate location	Global
Commodities covered	All seafood and aquaculture feed
Platform focus areas	Climate, environment, social responsibility, transparency
Engagement with other PCCs	GDST, GSI, GSSI, GTA, ISSF, Sea Pact
Platform leader & website	Martin Exel, Managing Director; <a href="https://seabos.org">https://seabos.org</a>

## Seafood Business for Ocean Stewardship (SeaBOS)

### Recent Results and Impact

Since its launch, SeaBOS science teams have produced a series of [scientific background briefs](#) (“Keystone Dialogues”) to guide **multilateral discussions towards science-based decisions**. The platform published [an article](#) in the Financial Times to raise awareness and combat IUU fishing. In April 2021, SeaBOS released a [joint position statement](#) with ISSF and GTA to congratulate the Japanese government on its new fisheries laws.

### Financial Contributions and Business Model

SeaBOS members pay a flat fee to cover the administration and operation expenses of the Secretariat. Additionally, SeaBOS science agencies receive philanthropic support from the Moore, Packard, and Walton Family Foundations to fund research and scientific work.

### Monitoring and Reporting

SeaBOS provides updates on key platform outcomes each year through an annual [press release](#).

### Government Advocacy

The platform’s government working group engages in advocacy in the following ways:

- Participating in briefings, workshops, and panels on key SeaBOS priority areas
- Collaborating on strategic areas of chance with the [UN Global Compact Sustainable Ocean Business Action Platform](#)
- Providing strategic guidance and thought-partnership for the [High Level Panel for a Sustainable Ocean Economy](#)
- Collaborating with other precompetitive platforms through joint position statements such as the [Statement on Traceability and Port State Measures](#)

### A Platform Highlight: Supporting boat crews and ocean workers

During the COVID-19 pandemic and ensuing restrictions on the movement of seafood vessel workers, SeaBOS called on governments to address safety and labor rights concerns. The platform urged governments to implement policies that protect the rights and movement of seafarers and fishing vessel personnel as outlined in the [United Nations Global Compact Action Platform for Sustainable Ocean Business](#) and the [IMO Circular Letter no. 4204](#).

## Seafood Task Force (STF)

### Mission and Objective

**The Seafood Task Force is a non-profit, business-led coalition established to improve transparency and oversight in seafood supply chains through addressing human rights violations and environment degradation.** The Task Force's mission is to drive seafood supply chain oversight at scale, retain value in the supply chain for members, and address issues surrounding labor and illegal fishing in seafood supply chains. The platform also operates through [Ten Guiding Principles](#).

### Platform Commitments, Focus Areas, and Workplan

**All Commercial Members of STF are expected to:**

- Formally agree to the Membership Agreement, Bylaws and Antitrust Documents
- Contribute financially by means of an annual membership fee
- Map all Thai supply chains using fishmeal and other seafood products for private label products
- Work with the Task Force to develop a plan for traceability and social audits of their supply chain
- Work internally within their companies and with their supply chain to adopt/comply with the [Task Force Code of Conduct](#)
- Contribute to at least one Sub-Group
- Attend all calls and meetings

### Platform at a Glance

Start year	2014
Number of companies engaged	29
Supply chain segment	Processors, producers, retailers, suppliers
Non-industry partners	ASC, Ethical Trading Co., FishWise, GAA, IDH, IFFO RS, MSC, SFP, Verite, WWF
Corporate location	Global
Commodities covered	Feed for farmed shrimp, tuna, and other seafood products
Platform focus areas	Environment, social responsibility, transparency
Engagement with other PCCs	ISSF
Platform leader & website	Martin Thurley, Executive Director; <a href="https://www.seafoodtaskforce.global">https://www.seafoodtaskforce.global</a>

## Seafood Task Force (STF)

### Results and Impact

The Seafood Task Force's [10 Point Action Plan 2021](#) includes time-bound milestones and progress updates towards these goals. Progress on activities is also reported more informally on the [News & Views](#) webpage.

### Financial Contributions and Business Model

**Task Force Membership is split into Commercial Members and Non-Commercial Members such as NGOs and Advisors.** Commercial Members are required to pay an annual membership fee, while Non-Commercial Members may make contributions on a case-by-case basis. The Seafood Task Force is funded through member dues and philanthropic funding.

### Monitoring and Reporting

**Results tracking formally started in January 2021 with the 10 Point Action Plan.** Additionally, membership criteria have been updated to include mandatory annual requirements that are verified by the Secretariat to drive accountability.

### Government Advocacy

**The Task Force has a dedicated sub-group that collaborates with governments, primarily the Royal Thai Government.**

### A Platform Highlight: 10 Point Action Plan 2021

1. **Increase accountability:** require commercial members to demonstrate traceability and accountability
2. **Enhance tuna supply chain oversight:** require commercial members to develop tuna audit framework
3. **Improve worker recruitment supply chain practices:** require commercial members to engage in capacity building programs for more responsible recruitment
4. **Launch innovative and scalable STF oversight program**
5. **Co-create a culture of improvement through direct vessel owner engagement:** require STF Secretariat to develop relationships with vessel owners through understanding, remediation, and continuous improvement
6. **Protect against conversion of natural habitat to shrimp farms:** require Thai shrimp manufacturer members to map and verify that their farms are not converting natural habitat
7. **Co-create a vessel behavior monitoring program with the Royal Thai Government:** require STF collaboration with the government to assist in successful investigation and prosecution of vessel fishing violations
8. **Develop and deploy a STF environment code of conduct:** require STF members to pilot, revise and adopt an environment code
9. **Expand STF oversight to level the playing field in Asia:** require STF Secretariat to co-develop expansion plan with STF retailer and brand members
10. **Strengthen government leverage for reform through international markets engagement:** require STF Secretariat to operationalize mechanisms for bilateral engagement with governments

## Sustainable Fisheries Partnership Supply Chain Roundtables (SRs)

### Mission and Objective

**Sustainable Fisheries Partnership's SRs promote collaboration on improvement efforts in fisheries and aquaculture through supporting existing FIPs and AIPs.** SRs act as forums for processors, importers, and others to work together pre-competitively to address urgent and pressing fisheries and aquaculture issues.

### Platform Commitments, Focus Areas, and Workplan

**There are currently 9 active SRs, as well as two SRs in development (the Global Whitefish SR and Marine Ingredient SR).<sup>1</sup> In addition to supporting FIPs and AIPs, SRs also address IUU, fleet formalization, and transparency.** As of 2021, SFP is in the process of formalizing SRs, which includes establishing funding mechanisms, participant requirements, monitoring of individual participant's impacts, and establishing Industry Chairs.

SFP's goal is to ensure 75% of world production in key sectors is either sustainable (i.e., MSC-certified or green-listed in SFP's Metrics tool) or making regular improvements ("[Target 75](#)" or "T75").

*Note: Several of the active SRs evolved from other inactive SRs; the Farmed Shrimp SR was the Aquaculture and Asian Farmed Shrimp SRs, the Mexican Snapper/Grouper SR was the Mexican Seafood SR, the Mexican Shrimp SR was the Gulf of California Shrimp SR, the Global Mahi SR was the Central American Mahi SR, the Global Squid SR was the Asia Pacific Squid SR and the South American Squid SR.*

### Platform at a Glance

Start year	2006 (active SRs: 2014-2017)
Number of companies engaged	104 unique companies, 152 SR participants across 9 SRs
Supply chain segment	Processors, producers, retailers, suppliers
Non-industry partners	SFP
Corporate location	Global
Commodities covered	Octopus, farmed shrimp, wild shrimp, snapper/grouper, mahi, squid, tuna
Platform focus areas	Environment
Engagement with other PCCs	GTA, NFI Crab Council, Sea Pact
Platform leader & website	Various; <a href="#">Seafood Sectors &amp; Supply Chain Roundtables</a>   <a href="#">Sustainable Fisheries Partnership</a>

## Sustainable Fisheries Partnership Supply Chain Roundtables (SRs)

Active SRs	Start Year	Active Members	Number of FIPs Supported and Monitored	Countries/Regions with FIPs Supported and Monitored
Global Octopus	2017	20	4	Mexico, Morocco
Farmed Shrimp	2014	13	7	Indonesia, Thailand, Vietnam
Gulf of Mexico Shrimp	2014	13	6	United States (Alabama, Louisiana, Mississippi, Texas)
Mexican Snapper/Grouper	2017	9	2	Mexico
Mexican Shrimp	2017	8	4	Mexico
Global Mahi	2015	17	6	Costa Rica, Ecuador, Peru, Taiwan
Indonesia Snapper/Grouper	2015	13	2	Indonesia
Global Squid	2017	27	5	China, Mexico, Peru, Japan, India
Global Longline Tuna	2016	28	19	Indonesia, Japan, Sri Lanka, Atlantic Ocean, Indian Ocean, Pacific Ocean

## Sustainable Fisheries Partnership Supply Chain Roundtables (SRs)

### Recent Results and Impact

**SRs report progress as a percentage of the improvement of the entire sector.** The [SFP T75 Overall Progress Tableau Dashboard](#) shares these updates publicly. In 2020, 41% of global production was considered sustainable or improving.

SFP piloted the “Industry Chair” designation with SRs, which encourages business-side leaders to help steer discussion and action in the SRs.

### Financial Contributions and Business Model

**The majority of SR funding support comes from philanthropy.** Individual industry funding asks range from \$1,000-\$15,000, depending on the SR, and support FIP and AIP implementation.

### Government Advocacy

**SRs engaged in a variety of government advocacy activities, including the following examples:**

- Global Squid SR: Engaging with the SPRFMO, advocating for Peru artisanal fleet formalization
- Global Octopus SR: Advocating for stronger management in Mauritania, Morocco, and Mexico
- Farmed Shrimp SR: Working to engage the Thai government to strengthen aquaculture policies in Thailand
- Global Mahi SR: Advocating for formalization of unregulated fleets

### Monitoring and Reporting

**All SRs are responsible for reporting their goals and progress quarterly on their public [Supply Chain Roundtables](#) pages.** Each SR has an annual workplan with targets specific to [Target 75](#). A visual display of [T75 Overall Progress](#) shows that, in 2020, 41% of the world’s seafood production meets sustainability standards.

### A Platform Highlight: Global Squid SR

The SFP SR Chronicles highlight quarterly updates on SR progress publicly. The 2020 [Global Squid SR Chronicles](#) showcases progress on FIPs, government advocacy, new SR members, and new external partnerships, including:

- June 2021: 22 companies signed a letter of support to the Peruvian Ministry of Tourism for the Peruvian Jumbo Flying Squid FIP, requesting proactive engagement in formalization of the Peruvian fleet.
- March 2021: The SR formed an agreement with Global Fishing Watch, establishing a technical committee and consultant to prepare a report on IUU activities by distance-water fleets.

## Sustainable Seafood Coalition (SSC)

### Mission and Objective

**The SSC is a platform of UK businesses working to establish standards for responsible sourcing by buyers of seafood and a consistent approach to environment claims made when selling that seafood.**

**The platform has four aims to help achieve this:**

1. Encourage business commitments to the SSC Codes of Conduct.
2. Continually review and update the SSC Codes of Conduct to reflect developments in sourcing and labelling practices.
3. Support members to effectively implement their commitments to the SSC Codes of Conduct within 1 year of joining.
4. Influence changes in policy relevant to seafood sustainability.

### Platform Commitments, Focus Areas, and Workplan

**The [SSC Strategic Plan](#) includes the process to achieve each of these aims as well as detailed activities for 2021-2023.** Some key current activities include:

- Growing membership
- Revising the SSC Codes of Conduct on traceability to reflect the working principles of GDST
- Developing educational webinars for members
- Updating risk assessment information
- Developing government advocacy statements

### Platform at a Glance

Start year	2011
Number of companies engaged	45
Supply chain segment	Foodservice, retailers, suppliers
Non-industry partners	ClientEarth
Corporate location	U.K.
Commodities covered	All seafood
Platform focus areas	Environment, transparency
Engagement with other PCCs	GDST, GTA, HKSSC, SEA Alliance
Platform leader & website	Oliver Tanqueray, Coordinator; <a href="https://www.sustainableseafoodcoalition.org">https://www.sustainableseafoodcoalition.org</a>



# Sustainable Seafood Coalition

## Recent Results and Impact

**SSC's most recent Implementation Report tracks member progress and accountability against the Codes of Conduct.** The platform also shared its Codes of Conduct with both the HKSSC and Plataforma por la Sostenibilidad Pesquera (in Spain) to inform these platforms' development.

## Financial Contributions and Business Model

**The SSC is almost entirely funded by membership fees.** A minority of activities (<5%) are supplemented by private foundations where there is overlap with their funding objectives. Annual membership fees are tiered and based on membership turnover and range from ~\$205 to ~\$4,115 (£150 to £3,000).

## Government Advocacy

**Following Brexit, UK fishing communities recognized the lack of policies protecting the supply of sustainably-sourced seafood.** In response, in September 2019, SSC advocated for a robust post-Brexit fisheries management system to be protected by law in the UK by writing a [public letter](#) to the Secretary of State for the Environment, calling for a) Sustainable fishing limits that are legally binding in order to prevent overfishing; b) robust monitoring and enforcement to better aid vital data collection and ensure compliance with the rules; and c) sustainable management of shared stocks.

## Monitoring and Reporting

**Members view public reporting as an opportunity to justify their sustainability claims and showcase their progress.** Every three years a 3<sup>rd</sup> party consultant reviews member implementation of the codes. The most recent [Implementation Report](#) was published in 2020 and is highlighted below.

Membership has risen from 24 in 2017 to 44, as of August 2021. Members include 39 seafood businesses (up from 19 in 2017) and four representative organizations (e.g., British Retail Consortium).

## A Platform Highlight: 2020 Implementation Report Key Findings

The most recent [2020 Implementation Report](#) found:<sup>1</sup>

- 96% of members have sourcing policies in line with the Sourcing Code, while 56% have publicly available sourcing policies;
- 88% of member risk assessments meet the Sourcing Code;
- 100% of members meet responsibility claims on their own labelled products, while 91% meet sustainability claims on their own labelled products per the Labelling Code;
- 93% of members have improvement plans for farms, while 95% have improvement plans for fisheries.

## Sustainable Shrimp Partnership (SSP)

### Mission and Objective

**Launched in 2018, SSP aims to cultivate a collaborative environment in which shrimp producers can improve their social and environmental performance by farming shrimp in a sustainable way.**

### Platform Commitments, Focus Areas, and Workplan

**To join SSP, all member farms must satisfy four [product criteria](#):**

1. Receive ASC certification
2. Pass an antibiotic-free verification test and agree to regular testing
3. Have a neutral/positive impact on water flows leaving the shrimp farms
4. Implement blockchain technology to track product movement through the supply chain

**In addition, the platform has three other action areas:**

- The [Sustainability Leadership Roundtable](#): a forum for stakeholders to discuss and drive industry-wide improvement in sustainable shrimp farming
- [Scale-up programme](#): an initiative to help small-to-mid-sized farms achieve ASC certification
- [Consumer awareness](#): working in collaboration with different organizations and the culinary community to share best practices on sustainable shrimp sourcing

### Platform at a Glance

Start year	2018
Number of companies engaged	7
Supply chain segment	Producers
Non-industry partners	ASC, Ecuador National Chamber of Aquaculture, James Beard Foundation, IBM Food Trust, IDH, SNP, University of Zaragoza, WWF
Corporate location	Ecuador
Commodities covered	Shrimp
Platform focus areas	Environment, traceability, transparency
Engagement with other PCCs	GSI
Platform leader & website	Pamela Nath, Executive Director; <a href="https://www.sustainableshrimppartnership.org/">https://www.sustainableshrimppartnership.org/</a>

## Sustainable Shrimp Partnership

### Recent Results and Impact

**Currently, SSP has several initiatives underway to share findings and best practices from research efforts.** In collaboration with the University of Zaragoza in Spain, the platform is working on collecting data on shrimp farms throughout Ecuador to understand the occurrence and spread of shrimp disease. In addition, SSP will create a health management plan for the farmed shrimp sector to reduce and eliminate antibiotic use industry-wide.

### Financial Contributions and Business Model

**SSP is funded through three different streams:**

1. Member contributions: annual dues are determined each year by the annual budget set by the Board of Directors.
2. Associate member contributions: affiliated SSP members in the feed sector support various SSP projects by an annual fee.
3. Advisory Board support: the Advisory board members provide financial support on specific projects, for example, IDH and WWF contributions to implement the Scale Up program for small producers and the blockchain traceability implementation project.

### Government Advocacy

**SSP works in collaboration with the National Chamber of Aquaculture from Ecuador to lead industry wide improvements on sustainability and innovation.**

### Monitoring and Reporting

**SSP conducts verification both prior to and during membership.**

Every production cycle, SSP takes samples and tests for water impact (every 60 days) and antibiotic use (every 120 days). If water samples are not up to standard, SSP immediately contacts the shrimp farm and provides time for correction. SSP has a zero-tolerance policy for antibiotic use, and non-compliant members will be dismissed from the platform. SSP also does annual audits on traceability and every batch of SSP shrimp that is sold is verified through blockchain platform to issue a certificate of authenticity.

SSP internally presents progress to its Advisory Board and convenes triannually with SSP member farms to discuss work updates.

### A Platform Highlight: SSP's Blockchain Traceability project

Since May 2019, the Partnership has been working with the IMB Food Trust blockchain platform to enhance the transparency and traceability of Ecuadorian farmed shrimp. Shrimp farmers record production data on the blockchain, enabling retailers to trace their products at every stage in the supply chain. More recently, the SSP developed a consumer platform that [allows users to access the traceability information of their shrimp purchases by scanning a QR code](#) on product packaging.

## Section 4

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# Appendix

## Companies engaged in precompetitive collaborations<sup>1</sup>

Company	PCC(s)	Total #	NGO Partner
178 Degrees	GDST, HKSSC	2	N/A
2 Sisters Food Group	SEA Alliance	1	N/A
3 Fish	NFI Crab Council	1	N/A
A. Espersen A/S	GDST, SEA Alliance	2	N/A
Acme Smoked Fish	FMI	1	N/A
Advanced Fresh Concepts Franchise Corporation	GSSI	1	N/A
Aeon	GSSI	1	WWF
Afritex Ventures Ltd.	GDST, SFP SR (GLT)	2	N/A
Ahold Delhaize	GDST, GSSI, GTA, STF	4	GMRI, WWF
Ajinomoto Co., Inc.	GDST	1	N/A
Alaska Seafood Marketing	FMI	1	N/A
Aldi North	GDST, GTA	2	SFP
Aldi South	GDST, GTA, STF	3	SFP, WWF
Alfa Gamma	SFP SRs (GM, MSG)	2	N/A
Altamar Foods Corp.	SFP SRs (GM, GS)	2	N/A
Amacore	SFP SR (GLT)	1	N/A
Amende & Schultz	SFP SR (MS)	1	N/A
American Seafoods Group LLC	GDST	1	N/A
Americold	FMI	1	N/A
Anova Food LLC	GDST	1	WWF
Anova Seafood	SFP SRs (GLT, ISG)	2	WWF
AP2HI	GDST	1	N/A

Company	PCC(s)	Total #	NGO Partner
Aquastar	FMI, GDST, GSSI, NFI Crab Council, SFP SRs (FS, MS)	6	WWF
AquaChile	GSI	1	N/A
Aquaco, LLC	GDST	1	N/A
Aquastar USA	SFP SR (GS)	1	N/A
Arctic Storm Management Group	GSSI	1	N/A
Arista Industries	SFP SR (GO)	1	N/A
ASDA	GTA	1	N/A
Asian	STF	1	N/A
Asian Alliance International Company	GDST	1	N/A
ASIC	GSSI	1	N/A
Associated Seafoods	SEA Alliance, SSC	2	N/A
ATI	ISSF	1	N/A
Atlantic Imports, Inc.	NFI Crab Council	1	N/A
Auchan	GSSI	1	SFP
Austral Fisheries Pty Ltd.	GDST	1	N/A
Australis Seafoods	GSI	1	N/A
Bakkafrost	GSI	1	N/A
Bama Sea Products	SFP SR (GS)	1	N/A
Bayou Shrimp Processors	SFP SR (GS)	1	N/A
Beacon Fisheries	SFP SRs (GM, MSG)	2	N/A

<sup>1</sup> For clarity and brevity, FMI Seafood Strategy Committee is referred hereafter as FMI. CEA noted the individual roundtables for companies engaged with the SFP Supply Chain Roundtables model. Hereafter abbreviated as follows: (FS = farmed shrimp, GLT = Global Longline Tuna, GM = Global Mahi, GO = Global Octopus, GS = Global Squid, GoMS = Gulf of Mexico Shrimp, MSG = Mexican Snapper/Grouper, ISG = Indonesian Snapper/Grouper)

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Beaver Street Fisheries, Inc.	SFP SRs (FS, GM, GLT, GS, ISG)	5	SFP, WWF
Benchmark Holdings plc	GSI	1	N/A
BidFood	SFP SRs (GoMS), SSC	2	N/A
Big Easy Foods	SFP SR (GoMS)	1	N/A
Biloxi Freezing & Processing	SFP SR (GoMS)	1	N/A
BioMar	GSI, SSP	2	N/A
BJs	GSSI	1	N/A
Blue Earth Foods	SFP SR (GS)	1	N/A
BluGlacier	GSSI	1	N/A
Blumar	GSI, SFP SR (GS)	2	N/A
Bolton Food	GDST, ISSF	2	N/A
Bomar	GDST	1	N/A
Booths the Good Grocers	SSC	1	N/A
BRC	SSC	1	N/A
Brim	GSSI	1	N/A
British Retail Consortium	SEA Alliance	1	N/A
BSF	STF	1	N/A
Bumble Bee Foods, LLC.	NFI Crab Council, GSSI	2	N/A
Bumble Bee Seafoods	FMI, GDST, ISSF, STF	4	N/A
Byrd International	NFI Crab Council	1	N/A
Cabomar Congelados SAU	GSSI, SFP SR (GS)	2	N/A
Camanchaca	GSI	1	N/A

Company	PCC(s)	Total #	NGO Partner
Cannon Fish Company	SFP SR (GLT)	1	N/A
CAPPMA	GDST, GSSI	2	N/A
Cargill	GSSI, SeaBOS, STF	3	WWF
Carrington Foods	NFI Crab Council	1	N/A
Caterers Choice	GTA	1	N/A
Censea	GSSI	1	N/A
Cermaq	GSI, GSSI	2	N/A
CGC Group	GSSI	1	N/A
Channel Seafoods International	SFP SR (ISG)	1	N/A
Charoen Pokphand Foods	GDST, GSSI	2	N/A
Chefs Trading	SFP SRs (GLT, GM, MSG)	3	N/A
Chicken of the Sea	SFP SR (FS)	1	MBAq, WWF
Chicken of the Sea Frozen Foods	NFI Crab Council	1	N/A
China Blue Sustainability Initiative	GSSI	1	N/A
Citra Mina Group of Companies	GDST	1	N/A
Clearwater	FMI	1	N/A
CMC	ISSF	1	N/A
Compass Group plc	GSSI	1	MBAq

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Compass Group UK & Ireland	SSC	1	N/A
Congalsa SL	GSSI, SFP SR (GS)	2	SFP
Conxemar	GSSI	1	N/A
Co-op UK	GTA, SSC	2	SFP
Co-op Group	GSSI	1	WWF
Cornelis Vrolijk	GSSI	1	N/A
Corporacion Lanec	SSP	1	N/A
Costco Wholesale	STF	1	N/A
Cox's Wholesale Seafoods	SFP SR (GoMS)	1	N/A
CPF	SeaBOS, STF	2	N/A
Crocker & Winsor Seafoods	SFP SR (GS)	1	N/A
Crustacea Seafood Company Inc.	NFI Crab Council	1	N/A
Culinary Collaborations LLC	GDST, GTA, SFP SR (GLT)	3	N/A
D&A Seafood Solutions	SSC	1	N/A
D&E Import LLC	SFP SR (GLT, GM)	2	WWF
Darden Corporation	GSSI	1	N/A
Deep Sea Shrimp Importing Co.	SFP SR (MS)	1	N/A
Del Pacifico Seafoods	SFP SR (MS)	1	N/A

Company	PCC(s)	Total #	NGO Partner
Delta Blue Aquaculture	SFP SR (MS)	1	N/A
Devi Fisheries Limited	GSSI	1	N/A
Direct Ocean	SFP SR (GLT)	1	WWF
Direct Seafoods	SSC	1	N/A
Direct Seafoods London	SEA Alliance	1	N/A
Discefa/Ditusa	SFP SR (GO)	1	N/A
Diversity Seafoods	GDST	1	N/A
Dominick's Seafood Inc.	SFP SR (GoMS)	1	N/A
Dongwon	SeaBOS	1	N/A
DoRan Seafood	SFP SR (GoMS)	1	N/A
E. Frank Hopkins Seafood	NFI Crab Council	1	N/A
Eastern Fish Company	FMI, SFP SRs (FS, MS)	3	N/A
Eat the Kiwi	HKSSC	1	N/A
Eciens	GDST	1	N/A
Envisible LLC	GDST	1	N/A
Euclid Fish Company	GDST, Sea Pact	2	N/A
Everwin	ISSF	1	N/A
Evonik	SSP	1	N/A
Export Packers Company Ltd.	SFP SR (GS)	1	N/A
Fair Seas Ltd.	SEA Alliance	1	N/A
FCF	SEA Alliance	1	N/A
Fesba SL	SFP SR (GS)	1	N/A

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Fish is Life	SFP SR (GLT)	1	N/A
Fisherman's Choice	NFI Crab Council	1	N/A
Foncasal	SFP SR (GO)	1	N/A
Food Origin at the Source	HKSSC	1	N/A
FoodTech	ISSF	1	N/A
Fortune Fish & Gourmet	FMI, GSSI, HKSSC, NFI Crab Council, SFP SR (GLT)	5	SFP
Fortune International	GDST, SFP SRs (GO, FS, GM, GS)	5	N/A
Fowey Shellfish Co.	SSC	1	N/A
Fresco Fisheries	NFI Crab Council	1	N/A
Frinsa	ISSF	1	SFP
Fuller's	SSC	1	N/A
General Tuna Corporation	GDST, ISSF	2	N/A
Gilpin and Company, Inc.	NFI Crab Council	1	N/A
Glacier Fish	GSSI	1	N/A
Global Pez	SFP SR (GS)	1	N/A
Globest Seafood Global	FMI	1	N/A
Gorton's Inc.	GSSI	1	NEAQ
Grieg Seafood	GSI	1	N/A
Grobest	GSSI, STF	2	N/A

Company	PCC(s)	Total #	NGO Partner
Grupo Alfrio	SFP SRs (GO, GS)	2	N/A
Grupo Camaronero	SSP	1	N/A
Champmar			
Grupo Nueva Pescanova	GSSI, SSP	2	N/A
Grupo Profand	SFP SRs (GO, GS)	2	N/A
Gulf Pride Enterprises	SFP SR (GoMS)	1	N/A
Handy International	NFI Crab Council	1	N/A
Harbor Seafood	NFI Crab Council, SFP SR (ISG)	2	N/A
Harrods	GTA, SSC	2	N/A
Hello Fresh	SSC	1	MBAq
Heron Point Seafood	NFI Crab Council	1	N/A
High Liner Foods, Inc.	GSSI, STF, SFP SRs (FS, GS)	4	SFP
Hilo Fish Company	SFP SR (GLT, ISG)	2	WWF
Hilton Seafood UK	GDST, SEA Alliance, SFP SR (FS), SSC	4	WWF
Hong Kong Exhibition Centre	GDST	1	N/A
Hong Kong Personal Chef	HKSSC	1	N/A
IBERCONSA	GDST	1	N/A
Iberostar Group	GSSI, SFP SRs (GM, MS)	3	FishWise
Iberostar Hotels & Resort	GDST	1	WWF
Iceland	SSC	1	N/A



## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Iceland Seafood Barraclough Ltd	SEA Alliance	1	N/A
Iceland Seafood UK	GTA	1	N/A
IG International	SFP SR (GS)	1	N/A
Incredible Fish	SFP SRs (GM, MSG)	2	WWF
Indoguna Singapore	HKSSC	1	N/A
Inland Seafood Corporation	FMI, GDST, Sea Pact, SFP SRs (GM, MSG))	5	WWF
Inteqc	STF	1	N/A
Intercity Packers Meat & Seafood	GDST	1	N/A
International Seafood Ventures	GDST	1	N/A
Ipswich Shellfish Group	GDST, Sea Pact	2	N/A
Isabel	ISSF	1	N/A
Itsu eat beautiful	SSC	1	N/A
J.J. McDonnell	GDST, Sea Pact	2	N/A
Jackson & Partners	NFI Crab Council	1	N/A
JBS Packing, Inc.	SFP SR (GoMS)	1	N/A
Jealsa Rianxeira	ISSF	1	SFP
Kelly Deli	GTA	1	N/A

Company	PCC(s)	Total #	NGO Partner
King and Prince	GSSI	1	N/A
Kingfish Zeeland	SSC	1	N/A
Kyokuyo	SeaBOS	1	N/A
La Doria Ltd.	GDST, GTA	2	N/A
Labeyrie Fine Foods	GDST	1	N/A
Legit Fish	FMI	1	N/A
Lerøy Seafood Group	FMI, GSSI	2	N/A
Libra Seafoods	SSC	1	N/A
Lidl GB	SEA Alliance	1	N/A
LIDL Stiftung & Co. KG	GDST, SSC	2	SFP, WWF
Limson Trading Inc.	GSSI	1	N/A
Little River Seafood	NFI Crab Council	1	N/A
Loblaws Inc.	GSSI	1	N/A
Lovering Foods	GTA, GSSI, ISSF, SEA Alliance	4	N/A
Luen Thai Fishing Venture	GDST, SFP SR (GLT)	2	N/A
Lund Fisheries	SFP SR (GS)	1	N/A
Lusamerica	SFP SR (GLT)	1	N/A
Lynx Purchasing	SSC	1	N/A
Lyons Seafoods Limited	SEA Alliance, SFP SRs (FS, GS), SSC	4	N/A
M&C Responsible Food	HKSSC	1	N/A
M&S	GSSI, GTA, SEA Alliance, SSC	4	WWF

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Mandarin Oriental Hotel Group	HKSSC	1	N/A
Maria Aquacon	GTA	1	N/A
Mark Foods, Inc.	GSSI, NFI Crab Council	2	N/A
Marpefish	SFP SR (GO)	1	N/A
Marpesca	SFP SR (GS)	1	N/A
Mars Petcare	STF	1	MBAq, WWF
Maruha Nichiro	SeaBOS	1	N/A
Mazzetta Company LLC	GSSI, STF	2	N/A
Meijer	FMI	1	SFP
Meridian Products	SFP SR (MS)	1	N/A
Meridian Sea	SSC	1	N/A
Metro AG	GDST, GSSI, GTA	3	N/A
Mitsui Foods/D&E/MarGalicia	SFP SR (GO)	1	N/A
Moalia Sashimi Tuna	GTA	1	N/A
Morrisons	GSSI, GTA,SSC	3	SFP
Mowi	GSSI, SeaBOS	2	N/A
MRG	STF	1	N/A
MSD Animal Health	GSI	1	N/A
Mt. Cook Alpine Salmon Ltd.	GDST	1	N/A
Multiexport Foods	GSI, GSSI	2	N/A

Company	PCC(s)	Total #	NGO Partner
NAFCO Wholesale	GSSI	1	N/A
Natural Holland	HKSSC	1	N/A
Nestle Purina	STF	1	SFP
Netuno USA	GDST, SFP SRs (GO, GS, ISG, MSG)	5	N/A
New England Seafood International Ltd.	GDST, GTA, SEA Alliance, SFP SR (GLT), SSC	5	N/A
New Zealand King Salmon	GSI	1	N/A
Newport International	NFI Crab Council	1	N/A
NIRSA	ISSF	1	N/A
Nissui	GDST, GSSI, ISSF, SeaBOS	4	N/A
Nissui Flatfish	SSC	1	N/A
Nordic Seafood	GSSI	1	N/A
Norebo	GSSI	1	N/A
Norpac Fisheries Export	SFP SRs (GLT, ISG)	2	N/A
North Atlantic, Inc.	GDST, Sea Pact, SFP SRs (GLT, ISG)	4	FishWise
Northcoast Seafoods	SFP SR (GS)	1	N/A
Nova Sea	GSI	1	N/A
Nueva Pescanova S.L.	GDST, SFP SR (GS)	2	SFP
Oasis ATA	HKSSC	1	N/A
Ocean Brands	STF	1	N/A

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Ocean Canning Corporation	ISSF	1	N/A
Ocean Choice International	SFP SR (GS)	1	N/A
Ocean Garden	SFP SR (MS)	1	N/A
Ocean Strategies	FMI	1	N/A
Oceanic Seafoods	SSC	1	N/A
Offshore Shellfish	SSC	1	N/A
Omarsa	SSP	1	N/A
Orca Bay Foods	GDST, SFP SRs (GLT, GM)	3	N/A
Organic Ocean	SFP SR (GLT)	1	N/A
Overseas	SFP SR (GO)	1	N/A
Pacific Coral Seafood Co., Inc.	SFP SRs (GM, IGS)	2	N/A
Pacific Rich Resources	HKSSC	1	N/A
Pacific Seafood Group	GSSI	1	N/A
Pacific Wild Tuna	GDST, GTA	2	N/A
Panapesca Int.	GDST	1	N/A
Panapesca USA	SFP SRs (GO, GS)	2	N/A
Pataya	ISSF	1	N/A
Paul Piazza & Son, Inc.	FMI, SFP SR (GoMS)	2	N/A
Pesca Azteva SA de CV	GDST	1	N/A

Company	PCC(s)	Total #	NGO Partner
Pesfasa	SFP SR (GO)	1	N/A
Pharmaq	GSI	1	N/A
Phillips Foods	NFI Crab Council	1	N/A
Phillips Seafoods	FMI	1	N/A
Philly Seafood	SFP SR (GoMS)	1	N/A
Poseidon Food	NFI Crab Council	1	N/A
Princes Group	GTA, ISSF	2	N/A
Princes Ltd.	SEA Alliance	1	N/A
Produmar	SSP	1	N/A
Promarisco	SSP	1	N/A
PT Bumi Menara Internusa	GDST	1	N/A
PT Segara Makmur Indonesia	GDST	1	N/A
Publix	FMI, GDST, GSSI	3	SFP
Quirch Foods	NFI Crab Council, SFP SRs (GM, GO, GS, ISG, MSG)	6	N/A
QWEHLI	HKSSC	1	WWF
Ramus Luxury Seafood	SSC	1	N/A
Raw Seafoods	GSSI, SFP SR (GLT)	2	N/A
RD Foods	GTA	1	N/A
Red Lobster	GSSI	1	MBAq, WWF
Regal Springs Trading Co.	GSSI	1	N/A
Relish	HKSSC	1	N/A

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Rema Foods	GSSI, SFP SR (GLT)	2	N/A
RGE Agridev Corp.	NFI Crab Council	1	N/A
Rich Products Corporation	NFI Crab Council	1	N/A
Royal Greenland	GSSI	1	N/A
RS Cannery	ISSF	1	N/A
Ruggiero Seafood	SFP SR (GS)	1	N/A
Sainsbury's Supermarkets	GDST, GSSI, GTA, SEA Alliance, SSC	5	SFP
Salica	ISSF	1	N/A
SalmoFood	GSI	1	N/A
Salmones Austral	GSI	1	N/A
Salties, Inc.	GDST	1	N/A
Samuels and Son Seafood Co., Inc.	GDST	1	N/A
Sands China Ltd.	HKSSC	1	N/A
Santa Monica Seafood	GDST, GSSI, Sea Pact, SFP SRs (GLT, GO, GS, ISG)	7	FishWise
Sapmer	ISSF	1	N/A
Schnucks Markets	GSSI	1	N/A
Sea Delight	GDST, GSSI, NFI Crab Council, SFP SRs (GLT, GM, ISG, MSG)	7	FishWise, WWF
Seaborn	GSSI	1	N/A

Company	PCC(s)	Total #	NGO Partner
Seachill Hilton Food Group	GDST, SFP SR (GS)	2	N/A
Seacore Seafood Inc.	GDST, Sea Pact	2	N/A
Seafood America	NFI Crab Council	1	N/A
Seafood Imports, Inc.	SFP SRs (GLT, ISG)	2	N/A
Seafresh Group	GDST, SEA Alliance, SFP SR (FS), SSC, STF	5	N/A
SeaPak	GSSI, STF	2	N/A
Seattle Fish Co.	GDST, Sea Pact, SFP SRs (GLT, GS)	4	N/A
Seattle Shrimp & Seafood	GSSI	1	N/A
SeaValue	ISSF	1	N/A
Sherrill International	NFI Crab Council	1	N/A
Silver Coast Foods LLP	GDST	1	N/A
Skretting	GSI, SeaBOS, SSP	3	N/A
Slade Gorton & Company, Inc.	GSSI, SFP SR (GS)	2	N/A
Smucker's	STF	1	N/A
Socksargen Federation of Fish and Allied Industries, Inc.	GDST	1	N/A
Sodexo	GSSI, STF	2	WWF
Songa	SSP	1	N/A

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
South Seas Tuna	ISSF	1	N/A
Southeast Asian Packaging and Canning	GDST	1	N/A
Southwind Foods	GSSI	1	N/A
StarKist	ISSF, STF	2	N/A
Stavis Seafoods	GDST, NFI Crab Council, Sea Pact, SFP SRs (GLT, GM)	5	N/A
Sunnyvale Seafood	SFP SR (FS, GoMS)	2	N/A
Sunwoo Corporation	GDST	1	N/A
Supreme Crab & Seafood	GDST	1	N/A
Sysco Corp.	GDST	1	WWF
Sysco France	SFP SR (GS)	1	N/A
Tampa Maid Foods	GSSI	1	N/A
Target	GDST, STF	2	FishWise
Tassal	GSI	1	N/A
Taylor Shellfish	GDST	1	N/A
Tesco	GDST, GTA, SEA Alliance, SSC	4	SFP, WWF
Thai Union	GDST, GSSI, ISSF, SEA Alliance, SeaBOS, STF	6	WWF
Thai Union Manufacturing Co.	SFP SR (FS)	1	WWF
The Big Prawn	SSC	1	N/A

Company	PCC(s)	Total #	NGO Partner
The Esperson Group	GSSI	1	N/A
The Fishin' Company	FMI, GDST, STF, SFP SRs (FS, GLT, GM), SSC	7	WWF
The Happy Prawn	SSC	1	N/A
The Hong Kong and Shanghai Hotels Ltd.	HKSSC	1	N/A
The Kroger Co.	GSSI	1	WWF
The Town Dock	SFP SR (GS)	1	N/A
The Tuna Store	GDST	1	N/A
Thistle Seafoods	SSC	1	N/A
TOG	ISSF	1	N/A
Trace Register	FMI	1	N/A
Transglobal Products	NFI Crab Council	1	N/A
Trapananda	GSSI	1	N/A
TRF	STF	1	N/A
Tri Marine	GDST, ISSF, STF	3	N/A
Trident Seafoods Corporation	FMI, GSSI	2	N/A
Tropic Sri Lanka	GTA	1	N/A
Tropical	ISSF	1	N/A
True Worlds Group	SFP SR (GLT)	1	N/A
Twin Tails	NFI Crab Council	1	N/A
ULTCO	GSSI	1	N/A

## Companies engaged in precompetitive collaborations

Company	PCC(s)	Total #	NGO Partner
Unibond Seafood International	GDST	1	N/A
Unión Martín	SFP SR (GO)	1	N/A
Unisea	GSSI	1	N/A
US Foods	GSSI, SFP SR (GM)	2	SFP
Ventisqueros	GSI	1	N/A
Veramaris	FMI	1	N/A
Viveros Merimar/Angulas Aguinaga	SFP SR (GO)	1	N/A
Waitrose	GTA, SEA Alliance, SSC	3	N/A
Walmart	STF	1	SFP
Wegmans	GDST	1	N/A
Whitby Seafoods Ltd.	SEA Alliance, SSC	2	N/A
Whole Foods Market	GDST	1	MBAq
Wild Fish Direct	SFP SR (GM)	1	N/A
Wing Sang Seafood Holding	HKSSC	1	N/A
Wm Morrisons Supermarkets	GDST, SEA Alliance	2	N/A
WOFCO	SFP SR (GS)	1	N/A
Wood's Fisheries	SFP SR (GoMS)	1	N/A
Woolworths Group	GDST, GTA	2	N/A
World Wise Foods	GTA, SEA Alliance, SSC	3	N/A
XianNing Seafood	STF	1	N/A

Company	PCC(s)	Total #	NGO Partner
YO!	SSC	1	N/A
Youngs Seafood Limited	GDST, SEA Alliance, SFP SR (GS), SSC	4	N/A