Sustainable seafood and small-scale fisheries

Improving retail procurement

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The Shaping Sustainable Markets group works to make sure that local and global markets are fair and can help poor people and nature thrive. Our research focuses on the mechanisms, structures and policies that lead to sustainable and inclusive economies. Our strength is in finding locally appropriate solutions to complex global and national problems.

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Sustainable Development Goal 14.b (SDG14.b) calls for providing 'access for small-scale fishers to marine resources and markets' by 2030. Small-scale fisheries directly support approximately 7% of the global population and make up 47% of the value generated by the seafood industry. International seafood markets and big retail chains are increasingly important for small-scale fisheries, providing these fisheries with opportunities that can contribute to long-term socioeconomic stability. Through seafood sourcing policies that explicitly commit to supporting small-scale fishers, retailers can make positive contributions to healthier oceans, sustainable fisheries and the well-being of coastal communities. This report explores retailers' procurement of small-scale fisheries' produce, the challenges faced and the opportunities available.

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Summary

Context

Small-scale fisheries have great potential to deliver positive sustainable development impacts but remain marginalised and disadvantaged in the ocean economy. The underlying principle of the United Nations (UN) Sustainable Development Goals (SDGs) is one of equity – that 'no one is left behind'. To achieve this in the context of small-scale fisheries and the seafood industry, SDG14.b specifically calls for providing 'access for small-scale fishers to marine resources and markets' by 2030.

Small-scale fisheries catch 40% of the total 92 million tonnes of seafood captured annually and has an estimated first sale value of US$77 billion (47% of the total value generated worldwide). Most of this catch is sold domestically, but an important share of the marine small-scale fisheries catch (26%) also enters international trade, being exported mostly to the largest seafood markets worldwide.

Big retail chains dominate the seafood market in developed nations. They are under increasing pressure from consumers and the sustainable seafood movement to guarantee the environmental and socioeconomic sustainability of their produce and traditionally have relied on third-party certification schemes to secure environmentally sustainable seafood. This has resulted in positive knock-on effects for many of the world's largest industrial fisheries but has impacted negatively on small-scale fisheries.

Little is known about small-scale fisheries' access to markets and even less is known about retailers' procurement of products from these fisheries. Small-scale fisheries are fundamental for sustainable aquatic food systems, the future prosperity of retailers and the millions of people who rely on them both for livelihoods and for safe, sustainable and nutritious food. The UN SDGs are the framework for setting a course to a sustainable future and most big food retail companies proclaim to align with the SDGs. In addition, the world's attention has been focused on small-scale fisheries as the UN designated 2022 as the International Year of Artisanal Fisheries and Aquaculture (IYAFA 2022),[1] designed to catalyse the integration of small-scale fisheries into the configuration of future sustainable economies. As such, and in light of the opportunities small-scale fisheries offer and the call by SDG14.b for small-scale fisheries' access to markets, this report aims to:

- Provide insights into the current retailers' procurement of small-scale fisheries' products and what challenges retailers face in their capacity to source seafood from small-scale fisheries, and
- Provide a series of recommendations to retailers seeking to achieve the SDGs.

The results and discussion in the report are premised on the policy analysis of 35 retailers, 17 survey responses and seven interviews.

How retailers procure from small-scale fisheries and challenges they face

Most retailers surveyed source from small-scale fisheries, and several have policies explicitly outlining a commitment to source wild-capture seafood from small-scale fisheries. Still, the vast majority identified that sourcing from these fisheries poses many challenges. Challenges to sourcing from small-scale fisheries include the:

- Low number of certified small-scale fisheries, as the low revenue streams make the high costs of traditional certification inaccessible,
- Lack of or poor data, which makes evidencing the sustainability and origins of the product complicated,
- Low volumes and lack of consistency in supply, which mismatch with demand from large buyers,
- Lack of actors and agency in seafood value chains, which precludes retailers and producers from building relationships and engaging directly, and
- Poor infrastructure and logistics, which results in reduced quality and increases the likelihood of food loss and waste.

Taking action

A synthesis of trends identified in this report are presented, together with relevant **recommendations** for retailers seeking to increase engagement with and sourcing from sustainable small-scale fisheries and achieving the SDGs, namely SDG14.b.

1. Securing product from sustainable small-scale fisheries

Trend

Retailers are looking for new and alternative sources of seafood to match growing demand for more diverse and sustainable seafood. However, most retailers do not provide assistance in the establishment of value chains that would permit produce from small-scale fisheries to access their markets. In some cases, this seems to be due to a reliance on existing ecolabels; this is potentially problematic as current seafood ecolabels do not have adequate socioeconomic standards, which appears to be a growing priority for consumers.

Recommendations

- **Invest in seafood assurance sustainability frameworks** that focus on small-scale fisheries. Depending on the retailer's profile this can either be through an **internally developed self-assurance scheme** premised on transparency and accessibility by all stakeholders, or by investing in and contributing to the development of a **certification scheme** designed specifically for small-scale fisheries, based on SDG14.b and the Food and Agriculture Organization of the United Nations (FAO) small-scale fisheries (SSF) Guidelines.
- **Consult the SSF Guidelines** when developing procurement policies for seafood for guidance on human rights issues, appropriate language and important issues which may otherwise be neglected.

2. Improving public disclosure around small-scale fisheries' sustainable seafood

Trend

Retailers may engage and participate in sustainable activities benefiting small-scale fisheries but are not always effective at communicating these activities to the public. There is little indication in-store to allow consumers to understand the sustainable attributes of products, as all products are stocked together. Equally, retailers' websites are often either overly complex or provide too little information on policy and programmes.

Recommendations

- **Make reference to products in-store** originating from small-scale fisheries and **publicly commit to source** from small-scale fisheries over the medium to long term.
- **Explore the use of digital tools** for highlighting the sustainable attributes of small-scale fisheries' products in-store to help customers make informed decisions and consume responsibly.
- **Improve consumers' knowledge and awareness** of small-scale fisheries' supply of products to the market and the associated community benefits, and **improve consumer access to information** about and understanding of the company's policy and programmes that focus on small-scale fisheries.

3. Tackling food loss and waste

Trend

The majority of retailers' strategies to reduce food loss and waste are focused on the post-retail phase of a product's lifespan, whereas a focus on reducing loss and waste at the origin of a product's lifespan is rarely considered.

Recommendations

- **Invest in initiatives** to develop infrastructural and practical support for quality-improvement processes for small-scale fisheries.
- **Develop new product pathways** for seafood by-products by engaging and collaborating with companies developing and producing such products.

4. Taking a stance on IUU fisheries and harmful subsidies

Trend

Most retailers have policies on eliminating illegal, unreported and unregulated (IUU) sourced seafood from their supply chains and a few retailers claim to have programmes to selectively avoid seafood sourced from fisheries benefitting from harmful subsidies. Retailers are often part of national or regional retail consortiums that engage with government agencies and could exert pressure.

Recommendations

- **Consult, invest in and endorse** fisheries and organisations working to eliminate IUU fisheries' products and harmful subsidies. These systemic challenges are a major barrier to a sustainable ocean economy on numerous fronts including the fair and equitable management of small-scale fisheries.
- **Use political leverage** through consortium membership to collectively advocate governments and intergovernmental bodies for the timely, transparent and effective implementation of the World Trade Organization (WTO) Agreement on Fisheries Subsidies, while equally requesting improved policy on IUU fisheries and harmful subsidies.
- **Advocate for small-scale fisheries' tenure rights,** which are important for the legitimacy of small-scale fisheries' operations.
- **Phase out from large-scale fisheries that benefit from harmful subsidies** by adapting seafood procurement policy to include **a due diligence step** that mandates comprehensive investigations into the subsidies fisheries receive to reduce the potential of sourcing seafood benefiting from harmful subsidies.

Supply and demand for small-scale fisheries

1

1.1 The importance of small-scale fisheries for a sustainable future

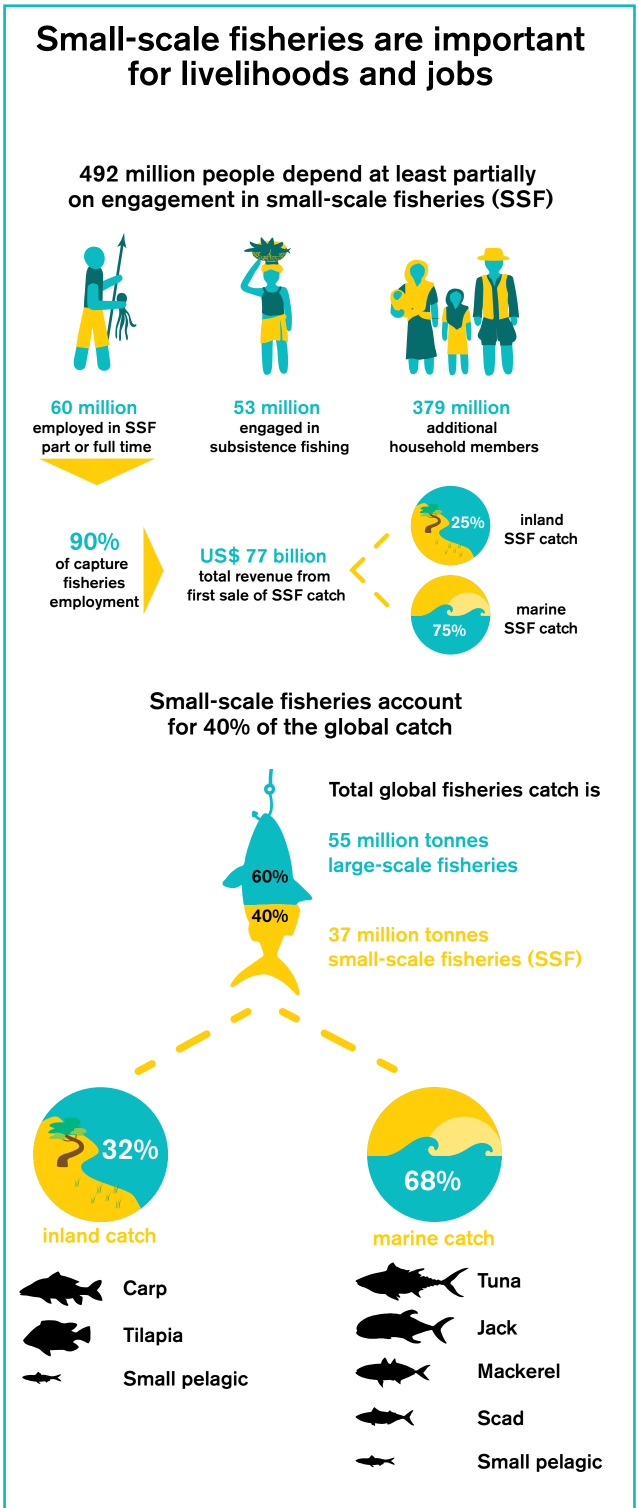
Small-scale fisheries have great potential to deliver positive sustainable development impacts but remain marginalised and disadvantaged in the ocean economy.[2] The underlying principle of the Sustainable Development Goals (SDGs) is one of equity – that 'no one is left behind'. To achieve this in the context of small-scale fisheries and the seafood industry, SDG14.b specifically calls for providing 'access for small-scale fishers to marine resources and markets' by 2030.

This focus on small-scale fisheries (SSF) is justified given that the sector is responsible for 40% of the global catch, with an estimated value of US$77 billion (€71billion). The sector directly employs 60 million people and supports the livelihoods of approximately 379 million people (7% of the global population) (see Figure 1).[3]

Small-scale fisheries' products circulate in markets at various scales and have traditionally been an important component of the local economy, with products often remaining locally and/or regionally. Although there is limited knowledge about the contribution of small-scale fisheries to international trade, the forthcoming Food and Agriculture Organization of the United Nations (FAO) report *Illuminating Hidden Harvests* (IHH) notes that on average 26% of marine small-scale fisheries' catch is exported.[4] Small-scale fisheries in developed nations are mostly dependent on domestic high-end markets, while many of their counterparts in developing countries, especially those exploiting high-quality ('luxury') seafood are dependent on exports to China, Europe, Japan and the USA: the largest seafood markets worldwide.[5 6]

The FAO's Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (the SSF Guidelines),[7] is the main United Nations policy instrument used to guide stakeholders in the achievement of SDG14.b.[8] The principles in the SSF Guidelines address policies, strategies and legal frameworks concerning small-scale fisheries, but also other matters affecting lives and livelihoods in fishing communities. The SSF Guidelines have a clear human rights-based approach and put people – rather than fish – in focus. They are global in scope and guide dialogue, policy processes and actions at national, regional and international levels.[3] Although the full realisation of SDG14.b requires a holistic approach relating to all the thematic chapters of the SSF Guidelines, Chapters 5 and 7 are identified as containing the recommendations most pertinent to SDG14.b.[8] Box 1 provides a summary.

Figure 1. A snapshot of the importance of small-scale fisheries (SSFs)



Notes: Adapted from the forthcoming FAO *Illuminating Hidden Harvests* (IHH) report on the contributions of small-scale fisheries to supporting livelihoods and employment (available via CC BY-NCSA 3.0 IGO).[3]

In recognition of the importance and to raise the profile of small-scale fisheries, the UN declared 2022 as the International Year of Artisanal Fisheries and Aquaculture (IYAFA 2022),[1] which provides an opportunity for all stakeholders to catalyse the integration of small-scale fisheries into the configuration of a sustainable future.

BOX 1. CHAPTERS 5 AND 7 OF SMALL-SCALE FISHERIES (SSF) GUIDELINES

Chapter 5 (Governance of tenure in small-scale fisheries and resource management) recognises the need for responsible and sustainable use of aquatic biodiversity and natural resources. It stresses that the right to use a resource and the responsibility to manage it come together. Key to this is the responsible governance of tenure that should have the support of all who have a stake in using the resource, including small-scale fisheries, industrial fisheries, civil society organisations (CSOs), environmental organisations and government.

Chapter 7 (Value chains, post-harvest and trade) calls for all parts of the value chain to be recognised as important and emphasises the need to include all who work in pre- and post-harvest activities in relevant decision-making processes. It also encourages states to invest in infrastructure, organisational structures and capacity development to make sure that safe, good-quality fish products reach consumers. Furthermore, it requires trade to be carried out in a fair and honest way that benefits everybody equally. Importantly, fish exports must not mean that local people lose out when it comes to making a living or eating fish as part of a nutritious and healthy diet. States and other actors should also make sure that trade does not harm the environment, culture, or people's ways of living or well-being.

1.2 Retailers and the sustainable seafood movement

The seafood retail sector in Europe and in other developed markets has changed substantially over the last two decades. Nowadays, big retail chains dominate the seafood market[9, 10] and are under increasing pressure to guarantee the sustainability of their produce.

Claims have been made that a major achievement of the 'sustainable seafood movement' (Box 2) has been the introduction of ecolabels into European and other Western societies' retail sectors.[11] However, concerns have been raised about the effect of ecolabels on poverty alleviation in developing countries.[12, 13]

BOX 2. THE SUSTAINABLE SEAFOOD MOVEMENT

The sustainable seafood movement finds its roots in the early 1990s, when fishery collapses around the world evidenced that fisheries resources were not inexhaustible, thereby prompting a global response to introduce environmental management measures throughout the seafood landscape.

The movement is driven by social marketing, through ecolabels and awareness campaigns, and populated by retailers, non-governmental organisations (NGOs), philanthropic foundations and institutions working together to leverage market trends that might induce sustainable practices. Over the past 30 years, these organisations and networks have come to define 'sustainable' seafood.[25]

Seafood ecolabels have also been perceived by some as undermining efforts to brand and market fish originating from small-scale fisheries.[14]

Although environmental sustainability is not guaranteed with ecolabelled seafood,[15] it is now common practice in many developed markets for retailers to request that suppliers provide environmental quality assurances in return for market access.[16] This has resulted in positive knock-on effects for many of the world's largest industrial fisheries[17] – but it has impacted negatively on small-scale fisheries, with the prohibitive costs of eco-certification resulting in few being able to afford it.[18, 19, 20, 21]

Demand for sustainably caught fish, paralleled with intense global fishing pressure, has been increasing over the past decade.[22] This is putting pressure on retailers to source seafood that meets policy commitments. This scenario is fraught with risks as retailers and other private enterprises in the seafood industry base their sustainability policies on corporate social responsibility (CSR) strategies. One of the biggest shortfalls of CSR frameworks is the lack of robust and consistent accounting of impacts, with many companies expressing commitments without clear structures in place to ensure implementation.[23, 24] Retailers perceive the need to remain flexible in order to match demand, which may jeopardise the long-term sustainability of wild-capture fisheries. The future of sustainable seafood depends greatly on retailers' future sourcing choices.

Considering the socioeconomic importance of small-scale fisheries, the contribution they make to the seafood industry and the fact that the SDG14.b specifically calls for providing access for small-scale fishers to markets by 2030, this report aims to improve the current knowledge of small-scale fisheries' access to retailer markets. The report results from an analysis of information provided by retailers about their seafood procurement and human rights policies found on their corporate websites, as well as data collected from an online survey and interviews with retailers (Box 3). The report also draws on a case study from the small-scale tuna sector (Box 4). The objective of the report is to provide insights into the alignment between retailers' seafood procurement strategies and SDG14.b, as well as recommendations to retailers seeking to achieve the SDGs.

BOX 3. DATA COLLECTION AND ANALYSIS

The initial phase of the research consisted of an analysis of the publicly available information on 41 retailers' and brands' corporate websites (36 retailers and five brands). This examination takes place against the background of Chapters 5 and 7 of the SSF Guidelines (see Box 1). The information collected was categorised as either 'policy' and/or 'programme', the former referring to regulations corporations have set for themselves, and the latter referring to an activity of some kind the corporation is undertaking.

Following this, retailers and seafood brands were contacted and invited to take part in an online survey. Data was collected from 17 respondents who took part in the survey (15 retailers and 2 brands), between 25 February 2022 and 25 March 2022. More detailed data was collected from eight of these retailers and brands that also took part in semi-structured interviews (see Appendix 1, Table A1).

The retailers and brands considered for the study and for which seafood procurement policies were analysed and those who took part in the survey and interviews are shown in Figure 2.

Only data from retailers was used in this report. Although seafood brands play a prominent role on the supply of seafood, data on brands was excluded from the final analysis. This decision was taken because out of the five brands contacted only two responded. This resulted in insufficient information for an in-depth analysis on brands' role in provisioning sustainable seafood and in the decision to exclude brands from the analysis.

The International Pole and Line Foundation (IPNLF) was consulted for the small-scale tuna fishery case.

BOX 4. SMALL-SCALE TUNA FISHERIES

A core objective of this study is to provide concrete information about a commodity that has an **international presence** and is sourced from both small- and large-scale fisheries. In this context, tuna provides a good example to explore retailers' procurement of seafood. Plus, due to its importance in global markets, many retailers have a **tuna procurement policy**.

Tuna is globally traded and sold by industrial and small-scale fisheries. Small-scale fisheries (pole-and-line, handline and trolling) have an unusually high 12% market share of commercially caught tuna.[26]

Tuna fisheries have an extremely **high potential for enabling SDG-aligned economic development**. The majority of tuna fisheries are found in tropical nations and mostly in developing states, where there is a high reliance on the tuna sector for livelihoods, income generation and food security. However, in practice, coastal states and impoverished coastal communities see very little benefit from the global tuna sector as a large amount of the resource is captured by industrial fisheries and a select group of companies.

Several **market trends undermine efforts towards achieving SDG14.b**. The market is steering increasingly towards industrial sources of tuna. This is driven by cost and industrial fisheries have an upper hand as they can operate at an economical scale that makes the returns on raw materials significantly lower per volume of tuna produced. To illustrate this point, between 2012 and 2018, total landings by small-scale pole-and-line vessels dropped from 9.5% to 5.6%. During the same time period the growth in market share of industrial tuna fisheries grew exponentially.[26]

Harmful subsidies further undermine the security of small-scale tuna fisheries. Harmful subsidies give an advantage to industrial fisheries in terms of mitigating the otherwise economically unsustainable cost of distant-water fishing trips. In almost all cases, harmful subsidies are integrated into the economic model of these fisheries that would otherwise not be financially viable.

The tuna industry also provides an example of how the sustainable seafood movement can contribute to a paradigm shift to sourcing practices that is directly undermining SDG14.b.

Figure 2. The 41 retailers and brands considered for the study

Retailers and brands analysed

Retailers and brands analysed

policy/programme analysis
survey/interviews

Notes: Retailers and brands that only had their policies and programmes analysed (yellow); the 17 retailers who also took part in the survey and interviews (blue).

How retailers procure products from small-scale fisheries

2

2.1 Challenges of sourcing from small-scale fisheries

As Figure 1 illustrates, small-scale fisheries could contribute enormously to the sustainable seafood industry's objective to secure future volumes sustainably, as the sector is responsible for 40% of total global catches. However, 94% of retailers report challenges in sourcing seafood from small-scale fisheries (see Figure 3) that the sustainable seafood movement has yet to tackle.

Figure 3. Retailers' perceptions of challenges of sourcing seafood from small-scale fisheries

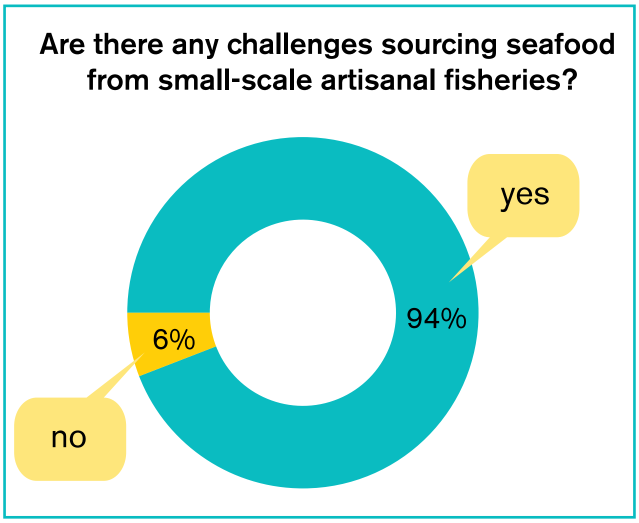


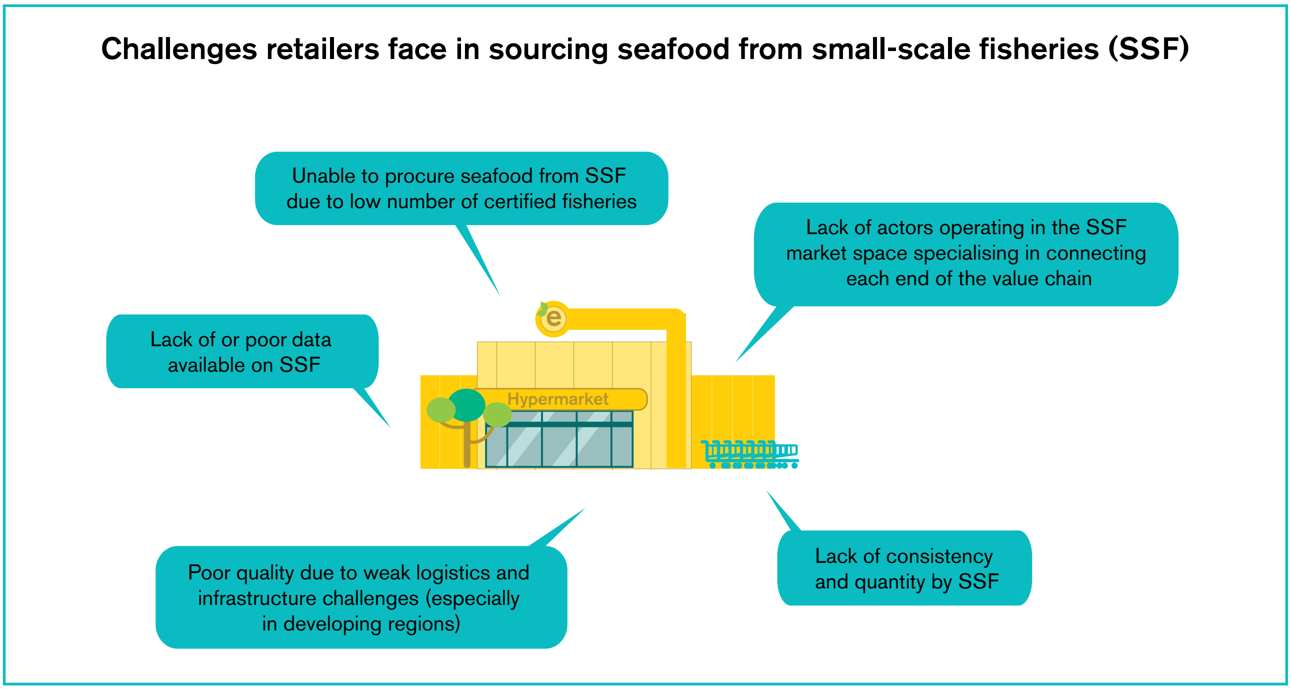
Figure 4 shows the major barriers preventing retailers from sourcing seafood from small-scale fisheries, according to the retailers interviewed for this report. These barriers are also discussed in more depth later in this sectin.

As a result of seafood procurement policies, retailers are frequently unable to procure seafood from small-scale fisheries because **few small-scale fisheries can afford certification costs.** Cost-associated barriers to market access are often experienced by small-scale fisheries.[18 19 20] The cost of eco-certification schemes can range from approximately €1,850 to €18,500 for pre-assessment and €9,250 to €462,000 for a full assessment.[20]

Costs are not the only issue for small-scale fisheries' market access. The small-scale fisheries sector is frequently characterised by domestic dynamics where family members play full-time roles in the fishery, drastically reducing opportunities to engage in decision-making processes, due to lack of time.[27] Retailers identified the **lack of actors specialising in connecting each end of the value chain** as a constraint in being able to source specifically from small-scale fisheries. Hence both producers and retailers are interested in working together, but the lack of appropriate intermediaries hinders this evolution.

A further issue identified by retailers is the **consistency and quantity of supply**. Small-scale fisheries often only target seasonal species and cannot guarantee a consistent supply.[28] Moreover, in regions where **logistics and infrastructure are poor**, adequate essential services are not available (such as cold

Figure 4. Main challenges retailers identified in sourcing seafood from small-scale fisheries



storage, refrigerated transportation, hygienic landing centres or appropriate processing and storage facilities) thereby resulting in **high post-harvest losses**[6] as well as greatly **decreasing the quality of products** and increasing the vulnerability of coastal communities.[29]

Finally, retailers pointed to the **lack of or poor data available from small-scale fisheries**. Retailers are increasingly expected to ensure transparency which is guaranteed by data availability. Small-scale fisheries are characterised by being data poor[30] and face a heavy burden in terms of collecting and reporting fisheries data because, unlike industrial fisheries, there are a far greater number of vessels landing catches at numerous locations[31] and market-based schemes do not adequately account for this. In addition, the lack of effective data available on small-scale fisheries in developing countries is often due to the fact that data are not collected or analysed by the state.

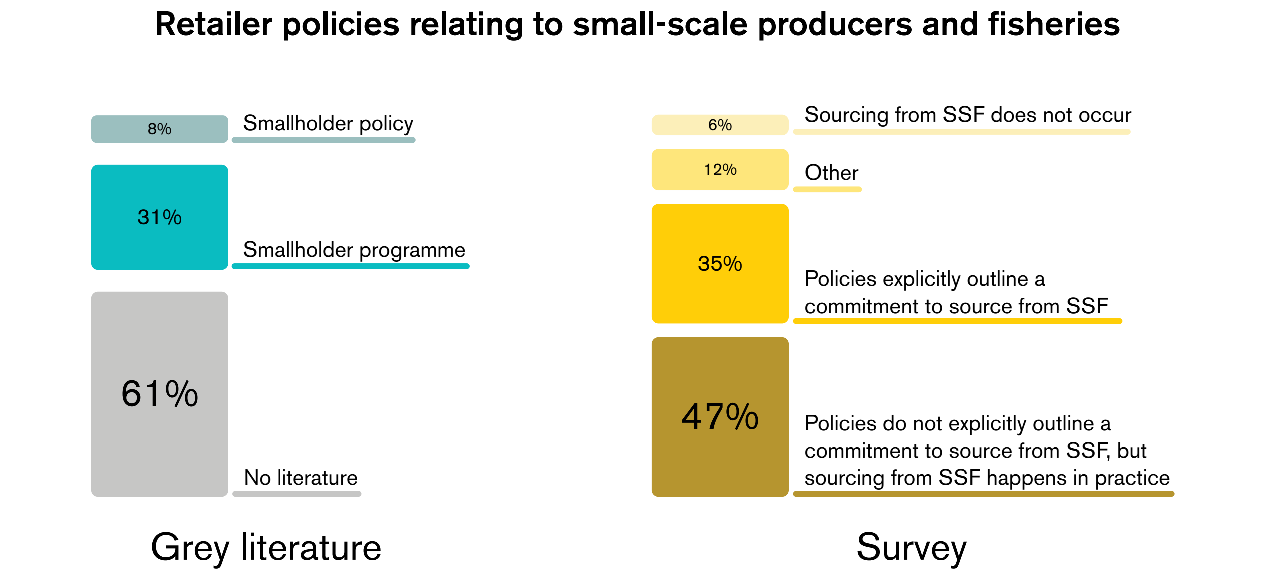
2.2 Current procurement policies for small-scale fisheries

Explicitly recognising and facilitating the needs of small-scale producers is a critical indicator of a retailer's capacity to work with small-scale fisheries. Of the 36 retailers analysed, only 31% had a 'programme' (an activity undertaken by the retailer) listed on their websites relating to smallholders in general (not specific to small-scale fisheries) (see Figure 5 left).

Despite the several challenges faced when sourcing seafood from small-scale fisheries identified in the previous section, 35% of retailers surveyed reported having specific policies to preferentially source wild-capture seafood from small-scale artisanal fisheries, while another 47% reported sourcing from small-scale fisheries despite not having policies explicitly outlining this commitment (see Figure 5 right).

This disparity can possibly be explained by the fact that many retailers justified their commitment to small-scale fisheries through the company's seafood sourcing standards. For example, one retailer responded, 'we promote sustainable fishing by ensuring certified fishing methods, avoiding damage to our oceans and preserving the health of marine species'. This commitment resonates with SDG14 to 'conserve and sustainably use the oceans, seas and marine resources for sustainable development' (especially targets SDG14.2 and SDG14.4). However, this statement alone does not constitute an explicit commitment to SDG14.b. Similarly, another retailer provided a link to company guidelines on fish and seafood sourcing; the guidelines commit to cooperating with the International Labour Organization (ILO) on labour standards, which again echoes targets under SDG8 on decent work and economic growth, but does not provide explicit provisions for small-scale fisheries' access to markets or resources, and therefore was not counted as a policy to support small-scale fisheries.

Figure 5. Retailers' procurement strategies for produce originating from smallholders and small-scale fisheries



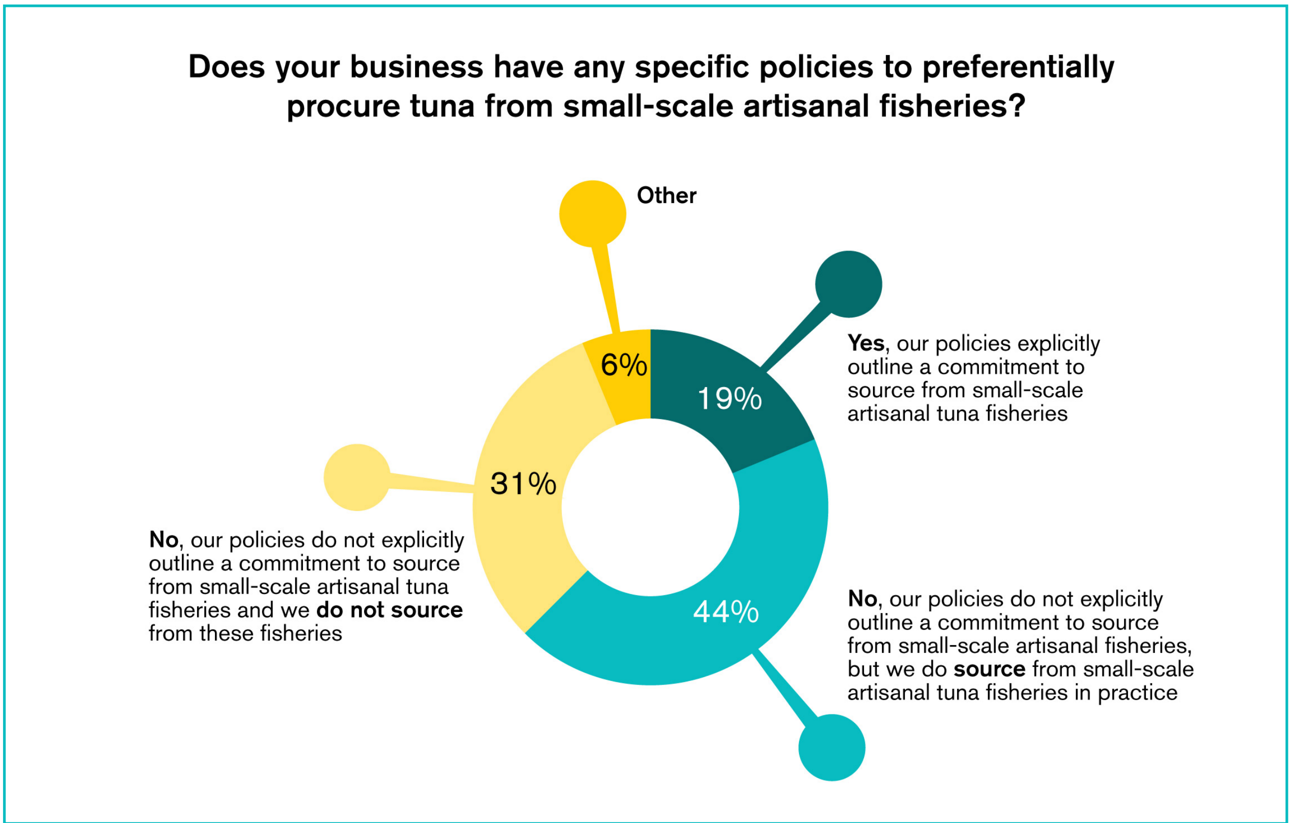
Notes: Data for smallholders was obtained from the policy analysis of grey literature (left); data for small-scale fisheries obtained from the survey (right).

On the other hand, several retailers explained that the granularity of their policy does not extend to specific fisheries, but that 'we are happy to source from fisheries which meet our comprehensive seafood sourcing policy'. Developing specific policies for small-scale fisheries is risky due largely to the challenges previously identified. If a retailer failed to comply with its own policy, it would run the risk of exposure and reputational damage. However, to publicly communicate an alignment with the SDGs (which by extension includes SGD 14.b) without procuring from small-scale fisheries represents a direct contradiction.

Tuna is a special case in seafood procurement, and most retailers in the survey have a responsible tuna sourcing policy (81%). However, only 18% have policies which explicitly outline a commitment to source from small-scale tuna fisheries (see Figure 6). Box 5 provides some detailed explanations of retailers' tuna procurement policies.

To understand how well retailers work with smallholders, we analysed their publicly available (grey) literature to identify each retailer's stance towards other small-scale sectors (as measures for sustainable management are frequently replicated across different food-production sectors as the needs are similar). This is evidenced by the FAO policy instrument, Voluntary Guidelines on the Responsible Governance of Tenure of Land, Fisheries and Forests in the Context of National Food Security (VGGT),[34] which speaks to small-scale fisheries, forestry and agricultural production. Consequently, retailers frequently have 'policies' or 'programmes' that apply to small-scale aquatic food producers, but perhaps do not explicitly acknowledge or tailor these policies to small-scale fisheries. This is problematic as small-scale fisheries come with unique challenges that require specialised knowledge to address. Dedicated plans should be written by retailers seeking to source from small-scale fisheries rather than replicating strategies designed for terrestrial sectors as these sectors operate completely differently.

Figure 6. Retailers' responses regarding policies to preferentially procure tuna from small-scale fisheries



BOX 5. TUNA PROCUREMENT POLICIES

Respondents noted that tuna procurement policy is guided by organisations including the Global Tuna Alliance (GTA), the World Wide Fund for Nature (WWF), the Marine Stewardship Council (MSC), and the Global Sustainable Seafood Initiative (GSSI), all of which are organisations either without explicit commitment to supporting small-scale fisheries or without a robust framework for small-scale fishery participation. These organisations are hugely influential in the sustainable seafood movement but lack specialised knowledge on small-scale tuna fisheries and are therefore not in the best position to advise retailers on the procurement of sustainable tuna from small-scale fisheries.

Some interviewees suggested the need for an intermediary specialising in global tuna trade to inform their tuna sourcing policies – and specifically, an agent able to advise companies on where to source tuna from small-scale fisheries. The International Pole and Line Foundation (IPNLF) is perhaps the organisation that most closely resembles this type of entity in the context of tuna, specialising in 'connecting small-scale fishers with the industry and helping them to reduce their environmental impact' and aims to 'make tuna more readily available, protect ecosystems and safeguard the livelihoods of local fishers.'[32]

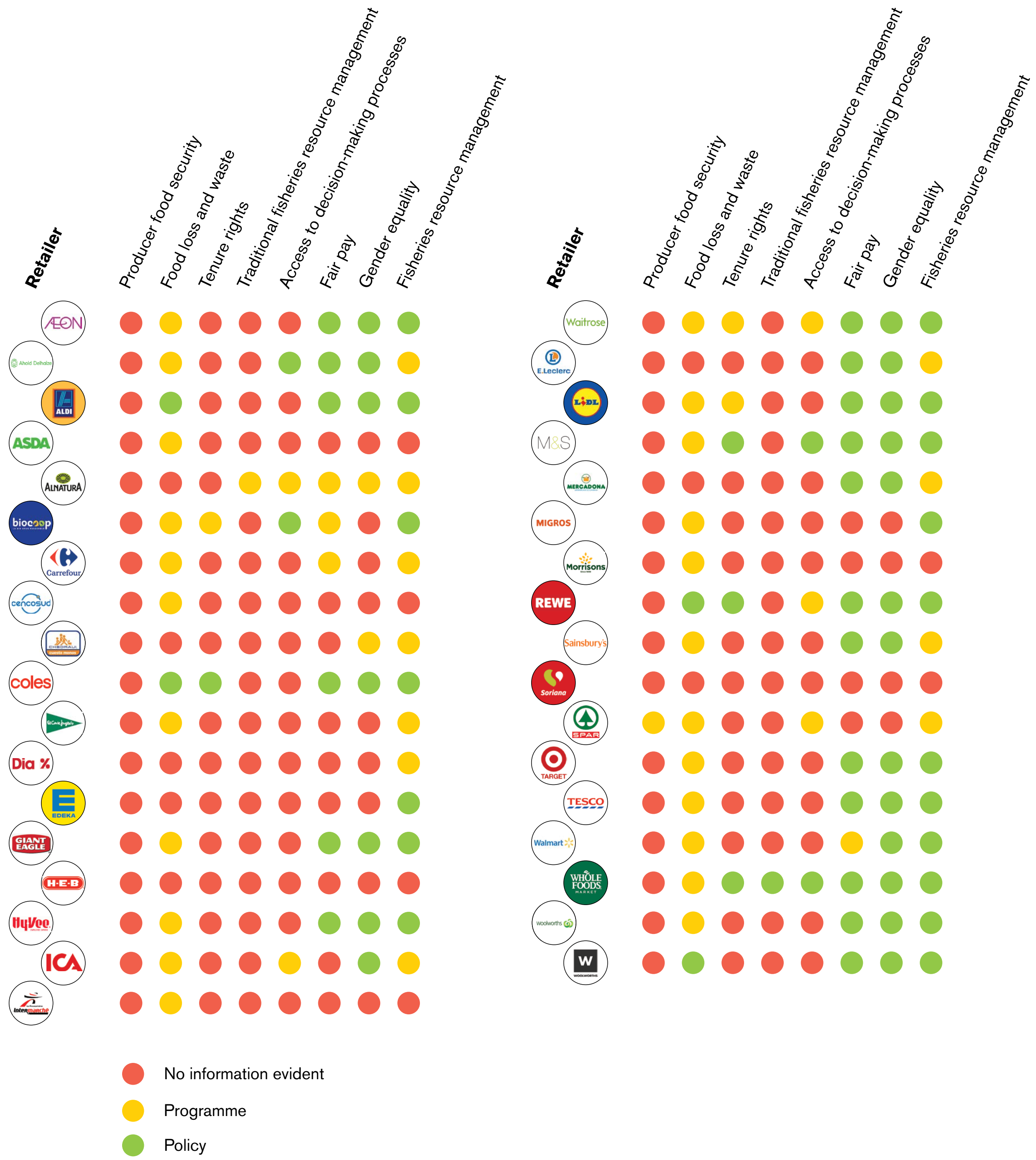
Although not specific to tuna, more broadly there are a number of other organisations who specialise in supporting small-scale fisheries in the marketplace. Blue Ventures specialise in developing small-scale fisheries such as octopus fisheries in Madagascar and Indonesia, to improve their management and increase their presence in the marketplace. The Environmental Defense Fund (EDF) is also an organisation that has specialist expertise in advising on small-scale fisheries, having recently launched the SSF Hub[33] with resources that assist efforts to support people working along small-scale fishery value chains and to learn about specific challenges associated with small-scale fishery value chains, post-harvest and trade.

Figure 7 provides instances of where retailers have developed grey literature that appear to support SDG14.b. Grey literature evidencing preferential treatment of smallholders is common across many retailers and often resonates deeply with the requirements of both SDG14.b and the SSF Guidelines. However, the explicit specification of small-scale fisheries was not observed anywhere, whereas other sectors such as bananas, coffee and textiles were mentioned. Some of the major benefits retailers provide to producers in other sectors include:

- Adequate arrangements to ensure rights are upheld
- Long-term trading relationships, and
- Preferential protection from market volatility.

The inconsistency across sectors may largely be related to the challenges retailers face in seeking to source from small-scale fisheries identified previously.

Figure 7. Retailers' alignment with core components of SDG14.b



Notes: Data were obtained from the policy analysis of grey literature. Each column reflects a component part of Chapters 5 and 7 of the SSF Guidelines, the principal instrument for guiding the implementation of SDG14.b. 'Policy' is interpreted as regulations the retailer has set themselves on a specific component (not necessarily in consideration of the SSF Guidelines); 'Programme' indicates where a retailer is committed to some form of action on the component.

3 Solutions for increasing sourcing from small-scale fisheries

Seafood retailers are aware that the sustainable seafood movement needs to evolve. Section 2.2 of this report has highlighted the disparity between retailers' approaches to agricultural sectors and fisheries and this is perhaps because industry initiatives such as the Global Coffee Forum, World Banana Forum and Better Cotton Initiative have more comprehensively addressed alignment with the SDGs. One retailer interviewed for this report even expressed frustration by the missed business opportunities the sustainable seafood movement has cost the sustainable seafood market. The same retailer argued that the sustainable seafood movement focuses too intently on the environmental dimension of fisheries, while sidelining the socioeconomic dimension.[35]

SDG14.b sits squarely within this call for greater integration of the socioeconomic dimension of fisheries, with its accompanying instrument – the SSF Guidelines – supporting 'social and economic development for the benefit of current and future generations, with an emphasis on small-scale fishers and fish workers and related activities and including vulnerable and marginalised people, promoting a human rights-based approach'.[2] The following sections examine how retailers could adapt procurement strategies to be more consistent with SDG14.b.

3.1 Profiling small-scale fisheries to work with

For retailers to identify small-scale fisheries to work with, small-scale fisheries need to present a profile that matches the logistical and administrative requirements of the retailer. This is a sensitive issue that requires prudence as small-scale fisheries, especially in developing regions, often lack the capacity to overcome complex administrative barriers.[36] Nevertheless, proponents of the sustainable seafood movement have been investing in dismantling these barriers to trade for small-scale fisheries.[37] Box 6 provides an in-depth case study of the presence of small-scale tuna fisheries in international markets, detailing the structural changes that have occurred in some fisheries that have enabled an increase in market access for small-scale tuna fisheries.

Retailers interviewed concurred that when searching for small-scale fisheries to work with, the following criteria were deemed important:

- **Organisation:** A fisher association or similar structure is encouraging for retailers as it demonstrates a level of administrative capacity in the fishery. Organisation of a fishery is closely associated with SDG14.b and with Paragraph 7.4 of the SSF Guidelines stating the importance of 'adequate organizational and capacity development in all stages of the value chain in order to enhance [fishers' and fishworkers'] income and livelihood security in accordance with national legislation'.[2]
- **Trusted intermediaries and partners:** As an extension to a fishery's organisation, retailers could benefit from a trusted intermediary and/or partner to be able to maintain a bridge of communication between the small-scale fishery and the retailer and allow the retailer to access the fishery to ensure that sustainability criteria are being met. These intermediaries (which could be an assortment of different entities such as NGOs, trade coalitions and bodies, and private consultancies) should be specialised in supporting small-scale fisheries and able to advise and guide retailers in procuring seafood from them. This ties in closely with Paragraph 7.4 of the SSF Guidelines, which calls for the development of necessary market mechanisms that would allow small-scale fisheries to access markets.[2]
- **Infrastructure:** Especially for retailers operating short value chains, it is important that there is infrastructure available to be able to assess and inspect the fishery in accordance with procurement policies. As one retailer pointed out, this is more easily achieved in developed regions where infrastructure is extensive. However, some retailers concurred that challenging conditions in remote areas of the world was not a 'make or break' factor in choosing a fishery._ Again, there is a close link with the SSF Guidelines. Paragraph 7.3 states a need for 'investments in appropriate infrastructures […] to support the small-scale fisheries' post-harvest subsector in producing good quality and safe fish and fishery products, for both export and domestic markets.'[2]
- **Local fisheries:** Where possible, retailers are interested in sourcing produce locally as testified by British and French retailers operating fresh fish counters. In the case of one UK retailer, although the fresh fish counter does not generate large profit margins, it does permit the retailer to provide seasonal and alternative options to seafood that is more commonly sought by British consumers. In France, one retailer has recently developed a product line that assures that the seafood product originates from a vessel of <16m, that was at sea for less than 24 hours and fished in French coastal waters (within 12 nautical miles), which are all considerable factors when classifying small-scale fishing activities.[38]

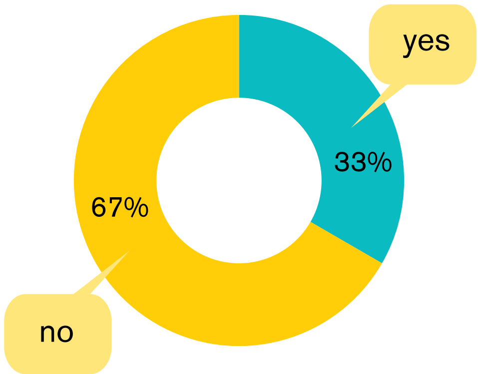
Sourcing from local fisheries does not correspond directly with SDG14.b and there is no explicit recommendation for developing local value chains in the SSF Guidelines, as both the SDG target and the guidelines address all scales of seafood trade rather than exclusively local scales. Indeed, short and local supply chain schemes for small-scale fisheries have increased in popularity over the past 10 years, especially in the USA, Canada and Europe, and this concept is prominent in the current discourse around small-scale fisheries' markets and marketing.[39 40]

- **Improvement investments:** Importantly, the fishery (if not already operating at the highest standards) should be able to provide evidence of an improvement plan of some sort, hence the increase in the number of fisheries in fishery improvement projects (FIPs). A British retailer stated that this may require financial investment on the retailer's behalf but conceded that managing this improvement is not within their realm of expertise. Having NGOs or fisheries experts to guide this process is often key to contributing to the 'trusted intermediary' component of identifying small-scale fisheries to work with.

Despite identifying these criteria as important, only 30% of retailers who participated in the survey currently engage in activities aimed at assisting small-scale fisheries to improve their capacity (see Figure 8).

Figure 8. Retailers' responses regarding help for small-scale fisheries to improve the capacity for sustainable fisheries management

Does your business engage in any activities aimed at assisting small-scale artisanal fisheries to improve their capacity to manage their fisheries sustainably?



To date, the sustainable seafood movement has been defined by partnerships between retailers and NGOs, with the former making public commitments to source seafood meeting specific standards, and the latter sourcing funding from philanthropic foundations to directly implement change within the fishery.[25] However, this direction has resulted in a bottleneck as retailers have committed to sourcing from third-party certification schemes such as the Marine Stewardship Council (MSC), which, as previously illustrated, is beyond the financial reach of most small-scale fisheries. In light of the marginalisation of small-scale fisheries, Gutiérrez and Morgan (2015) recommend that 'if the goal of the sustainable seafood movement […] is to ensure that markets carry only sustainable product it will become an economic necessity for actors in the supply chain, and particularly at the upper end of the supply chain, to share in the cost of sustainability'.[25]

One Mexican retailer with a small-scale fisheries sourcing policy stated that 'we do not help directly [engage in activities aimed at assisting], however by buying sustainable products we help [fishers] have a better quality of life with fair payment'. This echoes findings by Méndez *et al.* (2010) relating to third-party certification for small-scale coffee production through Fairtrade. By itself, Fairtrade certification does not improve aspects of sustainable livelihoods (such as education or healthcare) but it does deliver increased renumeration for the producer, which in turn contributes to supporting capacity building and leveraging global development funding.[41]

BOX 6. SMALL-SCALE FISHERIES' TUNA IN INTERNATIONAL TRADE

The Maldives is the third-largest producer of pole-and-line tuna in the world, behind Japan and Indonesia. The fishery can land over 68,000 tonnes of skipjack per year, representing over one-fifth of the total global supply of pole-and-line caught tuna and 18–20% of the total catch of skipjack from the Indian Ocean.[42] Crucially for the domestic market, the pole-and-line fishery currently accounts for 60–70% of all tuna caught in the Maldives.

Due to the connection of the fishery to high-value markets, the pole-and-line skipjack tuna fishery has continued to play an important economic role in the Maldives, both in terms of the export earnings it generates and its contribution to the incomes of those working in the sector. The fishery generates an approximate annual value of €98 million in exports, over half of the total export of fishery products by weight (51%) and representing 38% of the total value of fishery exports in the country, second only to yellowfin tuna.

There are approximately 677 licensed commercial pole-and-line vessels employing 7,981 registered fishers in the Maldives. However, using average crew number estimates from Miller *et al.* (2017) and the total number of vessels registered in the country (including licensed commercial vessels and vessels fishing for subsistence), the number of fishers could be as high as 10,832.[43] Roughly 8% of the local population work in the primary fishery sector in the Maldives. In total, the fishery is a key source of income for many people, both directly and indirectly supporting around 30,000 livelihoods.[44] Pole-and-line fishers are extremely well paid compared to other professions in the Maldives, earning an average monthly income at least twice as high as the national per capita average. However, the fishery is seasonal, and therefore their income can fluctuate per month throughout the year.[45]

3.2 Increasing the responsibility of retailers to source sustainably

High-end food retailers targeting affluent consumers have evolved to be perceived as the most reliable and trusted retailers in the countries where they operate. Retailers such as BioCoop in France, Marks & Spencer in the UK, and Woolworths in South Africa have spent decades building consumer trust. Common characteristics of retailers targeting affluent consumers include:

- **Not setting deadlines** about when their seafood will be '100% sustainable'. Instead, they aim to guarantee the assurance of quality. These retailers will commit resources and time to thoroughly ensuring that every dimension of the sustainability paradigm is properly accounted for.
- **Operating a more centralised seafood sourcing strategy and logistical operation**, with shorter supply chains and a majority of produce that is own brand. This enables them to retain tight control over the origin of their produce, with fewer degrees of separation between the retailer and fisher/producer.
- **Investing more in improvement projects for small-scale fisheries** because there is greater certainty that they will benefit from the results. Some retailers are investing in cold chain services for the small-scale fisheries they source from, leading to less food loss and waste (FLW).

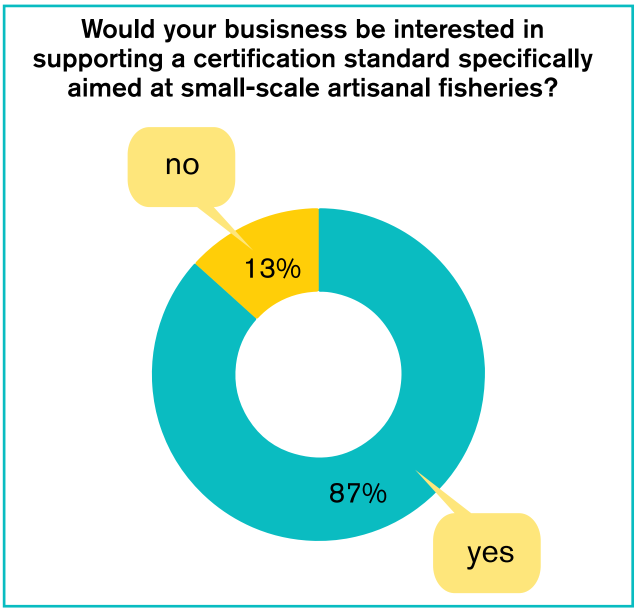
In the context of achieving SDG14.b, the business model of retailers targeting more affluent consumers is theoretically the most effective way of securing produce from small-scale fisheries in a sustainable manner. Shorter value chains, greater investments and digital transparency resonate with several recommendations in the SSF Guidelines. However, it is a model that is not broadly applicable to the majority of retailers as it requires a great deal of resource investment.

3.3 Supporting a certification standard for small-scale fisheries

All retailers explained that despite the costs and complexity of seafood certification schemes, it was fundamentally easier for the retailer to secure sustainable seafood from a certification scheme, especially if the scheme was well recognised by consumers.

But for small-scale fisheries, no viable certification scheme currently exists. Interviewees posited that this is because for such a scheme to work, a robust and comprehensive framework for assessing the socioeconomic dimension of fisheries would need to exist. Still, 87% of respondents expressed an interest in supporting and investing in such a scheme (see Figure 9).

Figure 9. Retailers' responses regarding willingness to support a certification standard specifically for SSFs



The reasons for the interest in a third-party certification scheme for small-scale fisheries included:

- **Retailers are aware of the growing need to assure the socioeconomic dimension of small-scale fisheries.** Retailers argued that in the context of sustainable development, the traditional focus on the environmental dimension of fisheries is greatly limiting, both in terms of business opportunities and in terms of achieving sustainable development more broadly.
- **Retailers are interested in increasing the diversity of available seafood products**, which is currently limited either by their commitment to existing third-party certification schemes or by the complexity of sourcing from small-scale fisheries. Some retailers expressed frustration with the monopoly the MSC holds over the seafood sector and felt it would be 'healthier' for the industry to have other certification schemes available, thereby enabling them to expand their sourcing options for sustainability-assured seafood.[46]

Concern around a certification scheme for small-scale fisheries revolved around the potential trade-off with the environmental dimension of sustainability. The analysis of retailers' publicly available literature revealed that 82% of them endorse natural resource management for fisheries (see Figure 10). The majority of these were expressed through alignment with modern forms of resource management, such as MSC certification or FIPs. Conversely, only one retailer had a 'programme' recognising the role of traditional ecological knowledge (TEK) systems[47] and only Whole Foods USA had a 'policy' recognising the role of TEK.

Retailers should consider the overwhelming stewardship efforts of Indigenous peoples and local communities (IPLCs) in sustainably managing natural resources. A project by the University of British Columbia suggests that lands managed by IPLCs have equal or higher biodiversity than protected areas, and that partnerships with IPLCs can ameliorate shortfalls in habitat protection for biodiversity conservation.[48] Furthermore, a joint project by the FAO and Saint Mary's University (SSF Stewardship)[49] provides a comprehensive and in-depth perspective into specific small-scale fishing communities around the world actively engaged in resource management and conservation. Furthermore, in the context of the SDGs, Parties at the 2021 United Nations Climate Change Conference (COP26) pledged €10 billion to restoring degraded terrestrial ecosystems, tackling natural disasters and supporting the rights of Indigenous communities in recognition of their key role in protecting ecosystems.[50]

Whole Foods USA's policy on 'traditional resource management' stipulates that:

> *We recognize that small-scale producers and decentralized production processes (e.g., homeworkers) may have alternative, non-traditional mechanisms to implement these requirements. Where implemented, such systems must track and document the environmental impact, including the use of energy, air emissions, waste, water, pollution, hazardous materials, and recycling.*[51]

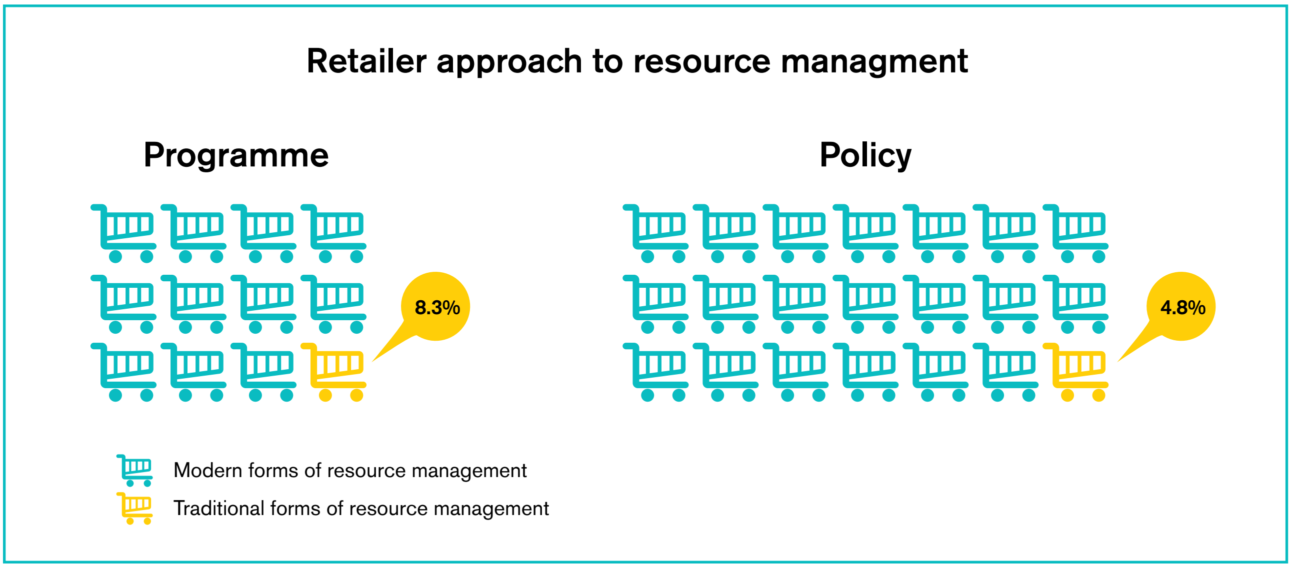
This is a progressive policy as it remains committed to empirical science, but respects the results of recent research demonstrating the important role Indigenous and local communities play in conserving local ecosystems.

In the context of achieving SDG14.b, a certification scheme for small-scale fisheries would not allow a retailer the same degree of control over the sustainability of a fishery as retailers operating more centralised procurement operations. However, it would assure the retailer that the fishery had adopted 'policies and procedures, including environmental, social and other relevant assessments, [that ensure] that adverse impacts by international trade on the environment, small-scale fisheries culture, livelihoods and special needs related to food security are equitably addressed' (Paragraph 7.9 of the SSF Guidelines).

All interviewees conceded that any certification for small-scale fisheries would have to undergo a rigorous design process that met both the needs of retailers and recommendations of both SDG14.b and the SSF Guidelines assiduously. In response to the survey, many retailers made suggestions as to what they would expect from such a scheme:

- Regardless of the scientific plausibility of a certification scheme, its success would depend on the **endorsement of the sustainable seafood movement**.
- Such a scheme should **prioritise the social and human aspects** which so far are lacking in existing seafood eco-certifications. Specifically, schemes should address labour standards, producer inclusivity, market access and business credibility.

Figure 10. Management approaches used by retailers to ensure the environmental sustainability of their seafood products



- The language around such a scheme should be **less prescriptive** and mechanistic in its composition.
- Emphasis should be placed on **authorised fishing gear and techniques**.
- Consideration should be given to whether the scheme could be made to work for **business-to-business** (B2B, a form of transaction between businesses where products, services or information are exchanged). This would be beneficial for seafood brands and mid-supply chain actors.

3.4 Going beyond certification

Plausible though a certification scheme for small-scale fisheries might be, one retailer posited that certification should be seen as a means to an end, and not an end in itself. According to the retailer, the sustainable seafood movement needs to start considering that certification itself should come to an end. Roheim *et al.* (2018) make a similar argument and propose two scenarios that would require the evolution of the sustainable seafood movement's current reliance on certification.[16]

The first scenario sees greater state intervention in the securing of sustainable seafood. The second scenario is premised on the creation of 'transparency brokers' that would expose their own market reputation by being publicly accountable for the quality of information and guidance they provide.[52] In the context of small-scale fisheries, the first scenario may be preferable as small-scale fisheries are already so marginalised from political processes around fisheries and the ocean economy. The second scenario still runs within the discourse that has defined the sustainable seafood movement from the outset, in that a 'transparency broker' is still greatly responsible for framing the seafood industry's interpretation of 'sustainable fisheries and seafood'.[25]

3.5 Improving in-store public disclosure of information about small-scale fisheries

As one retailer explained, 'from a retailers' perspective, sustainability is just as much about selling the product as it is about sourcing it'. Regardless of the sustainability of a product, **consumers need to be interested in buying it**. Therefore, where retailers commit to selling sustainable products, an effective communications strategy is required.

Many retailers concurred that communication is an area where the retail market generally falls short of what is required to promote sustainable produce. One interviewee argued that retailers need to make more effort to distinguish between the differing degrees of sustainability attributed to products in-store. However, both French and British retailers explained that highlighting the difference between 'good' and 'bad' products incited negative feedback on the retailer's reputation. In France it is seen as being 'moralistic' and in the UK consumers expect all products to meet a minimum standard, and that highlighting a 'negative' product would only result in the retailer being seen as supplying unsustainable produce. Instead, both French and British retailers tend to focus solely on the positive aspects of a product by portraying the narrative behind products that have particularly sustainable merits.

The challenges to employing effective communication methods in-store include limited space and that consumers are not primed for being educated about the origins of products. Retailers using **ecolabels** did explain that logos are particularly effective at **instantly communicating a 'seal of trust'**, such as the MSC's 'Blue Tick' or Pavillon France's 'Three Fishers' where consumers assume that the product is sustainable in some way.

Despite the influence current ecolabels have enjoyed within the seafood industry, research into consumer behaviour suggests that people are increasingly interested in the narrative behind the product. According to the NGO Waste & Resources Action Programme (WRAP),

> *A food system which is able to articulate how products have been designed to benefit all involved in the value chain has the potential to attract new consumers and increase the Customer Lifetime Value, aligning with business objectives.*[53]

Some retailers did suggest that digital transparency solutions and the increased use of infographics are important tools to **increase consumer awareness in-store**. Other retailers noted that online shopping was increasingly common with younger consumers and increased during COVID-19, resulting in an overwhelming increase in online sales. In future, retailers could take advantage of this trend to provide information that can empower consumers to make better-informed purchasing decisions, by providing links to articles on sustainable and responsible consumption.[54]

Recent research also suggests that younger consumers are increasingly in search of environmental and social sustainability attributes in seafood products and appear to be willing to pay more for products with these attributes.[55] Moreover, market research firm Mintel has demonstrated that 42% of UK adults aged 16+ say, 'I would expect food produced by smaller companies to generally be more ethical.' Mintel concludes that 'consumers have been romanced by product origin, ingredients or inspiration stories'.[53]

Looking forward, there is the need to improve in-store public disclosure of information about small-scale fisheries. Retailers are increasingly investing in **digital transparency solutions**[56] to maintain their reputation for sustainable sourcing. Solutions vary between retailers and include:

- Providing producers, experts, consumers and the retailer itself with online platforms where assessments of a product's sustainability can be made by each party,
- Ensuring that value chains are accessible and online with a full description of products' transparency, and
- Ensuring full public awareness of how the seafood product was caught and the environmental and social credentials of the fishery.

The use of digital transparency solutions has been explored and validated as a successful mechanism to effectively deliver **public disclosure of sourcing practices**. The US Food Industry Association (FMI), concludes that

> *Transparency is the currency of trust in the digital age. In an era when information moves fast, access is at our fingertips and feedback happens instantaneously, 'transparency' is emerging as a fundamental consumer demand.*[57]

3.6 Decreasing loss and waste

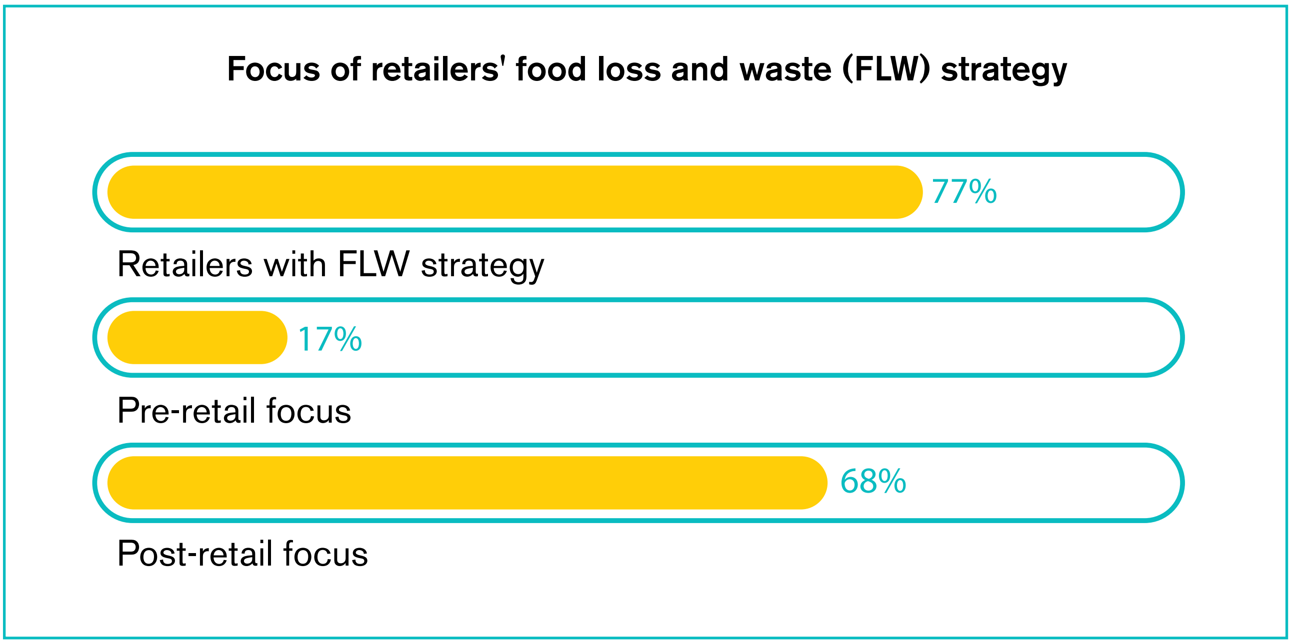
A major factor for retailers to consider in fulfilling SDG14.b are the products available for retail that can be sourced from small-scale fisheries.

The policy analysis for this report revealed that retailers' food loss and waste (FLW) strategies primarily focus on the post-retail period of a product's lifespan (see Figure 11). For example, common and commendable strategies include distribution to homelessness organisations or organic growing schemes. However, very few focused on working with the producers and other pre-retail actors to identify strategies for avoiding post-harvest loss and waste and better utilisation of a product.

Interviewees for this report posited that retailers are ultimately responsible for products available for sale. Naturally, the consumer has certain interests and demands, as laid out in the Mintel 2022 report, but the retailer operates the finer mechanisms that decide exactly which products end up on the shelves. One retailer identified the development of new products for consumer tastes as one of the most challenging obstacles for retailers trying to encourage sustainable consumption.

As part of FLW reduction strategies, retailers should consider identifying actions at the source of their products by working with small-scale fishers from developing nations to reduce post-harvest quality loss and creating new products or working with companies

Figure 11. Retailers' food loss and waste strategies



creating new products. Post-harvest quality losses can account for more than 70% of the total loss in a given value chain.[6] By working with small-scale fishers to improve post-harvest practices and investing in storage and infrastructure to reduce post-harvest quality loss this loss can be minimised. A report on preventing waste in fish-processing supply chains[58] makes a series of recommendations that align closely with SDG14.b and the SSF Guidelines:

- Build on export markets for by-products, such as fish heads, or the wider use of fish frames as flavouring where these offer economic benefits compared with fishmeal processing.
- Small processors and those in remote locations could benefit from collaborative programmes designed to optimise collection or exploit market opportunities.

A retailer interviewed explained that creating 'high-end' products that appeal to consumers' perceptions of fine food can be an effective way of selling seafood products. This aligns with Mintel's conclusions about the romanticised perception consumers have of some food products.

3.7 Committing to and supporting efforts to eliminate IUU fishing and harmful subsidies

3.7.1 IUU fishing

Concerns over **illegal, unreported and unregulated (IUU)** fishing has led to several policy, trade and surveillance measures. While much attention has been given to the impact of IUU regulation on industrial fleets, not enough attention has been given to differentiating small-scale fisheries.

Small-scale fisheries in developing regions often do not have access to the infrastructure or data-collection systems required to report catches, nor are the regulations surrounding small-scale fishing always clear or transparently governed. However, the mainstream construction of 'illegal', 'unreported' and 'unregulated' fishing, and the use of 'IUU' in an all-inclusive sense, is problematic for small-scale fisheries, as they frequently fall into the latter two categories despite mostly embodying sustainable fishing practices and many of the SDG targets.[59]

The majority of retailers reported having some kind of **policy for preventing sourcing from IUU fishing** (see Figure 12). However, explanations of how this was executed were not clear. Moreover, during interviews most retailers explained that identifying the specific origin of a certain seafood is very difficult, as suppliers (to reduce costs) amalgamate seafood from numerous sources. If retailers were to request the origin of the seafood down to the vessel level, it would incur huge logistical costs for the value chain.

3.7.2 Harmful subsidies

Harmful subsidies include subsidies that directly or indirectly contribute to overcapacity and overfishing in processes known as 'effort creep' and 'capacity creep'. Among the most harmful include fuel subsidies, vessel renewal and modernisation subsidies, and vessel and port construction subsidies. The vast majority of government subsidies to the fisheries sector fall under this category and capacity-enhancing subsidies may total in the region of US$22 billion globally.[60]

Fuel-tax subsidies have been identified as enabling industrial fishing, an activity that might otherwise be unprofitable (see also the example in Box 7).[61] This and other subsidies distort markets to the detriment of small-scale fishing companies. There is broad consensus that the conservation and sustainable use of ocean resources require a prohibition on harmful fisheries subsidies, with widespread calls for decades for the billions of Euros wasted on fisheries subsidies to be put to use in building the resilience of coastal communities and for the better protection of marine biodiversity.

It is critical to note that after two decades of negotiations, members of the World Trade Organization (WTO) concluded the Agreement on Fisheries Subsidies in June 2022. This treaty establishes the first binding set of global rules to curb harmful subsidies provided by governments to the fishing sector. A preliminary analysis by the International Institute for Sustainable Development (IISD) remarks that, 'while not as ambitious as the draft text trade officials started negotiating from at the start of the conference, this Agreement is a deeply significant policy step'.[62]

Only a few retailers claimed to have policies related to harmful subsidies (see Figure 12). Still, the subject of harmful fishing subsidies is one of the most urgent in the realm of ocean sustainability, impacting the broad diversity of stakeholders profiting from marine resources.

Harmful subsidies perpetuate and/or enable IUU activities to occur by financing the costs of distant-water fishing activities that would otherwise be unprofitable, and these types of distant-water fishing activities in turn elicit the highest risk for human rights abuses and illegal fishing activities to occur.[63 64 65 66 67]

Schuhbauer *et al.* (2020) illustrate the major imbalance in subsidy distribution, with small-scale fisheries receiving only about 19% of the total global fisheries subsidy amount of US$35.4 billion in 2018.[60] Their study demonstrates that a person engaged in large-scale fishing received around four times the amount of subsidies received by their small-scale fishery counterparts. Furthermore, 64% of the subsidies attributed to large-scale fishing are capacity-enhancing subsidies, which are known to exacerbate overfishing, thus increasing the unfair competitive advantage that large-scale fisheries already have.

No comprehensive analysis of the Agreement on Fisheries Subsidies has yet been published, but early commentary indicates that the text falls short of what is necessary to effectively curb the detrimental impacts of harmful fisheries subsidies.[62 68] Nevertheless, the agreement sets an important precedent and global framework for governing fisheries subsidies. During the research stage of this report, many retailers pointed out that there was currently no concerted international guidance on what constitutes harmful subsidies. Fortunately, due to the ratification of the Agreement on Fisheries Subsidies on 17th June 2022, all seafood retailers are now in a position to modify their procurement policies to support the landmark policy.

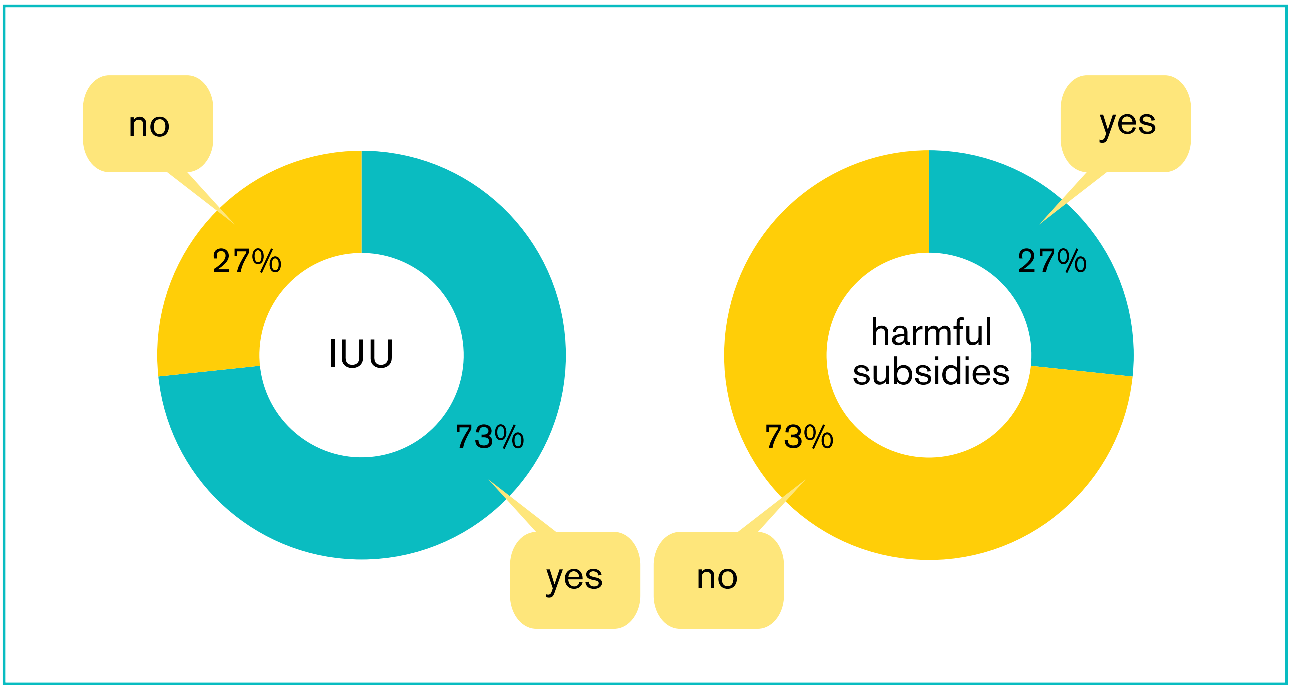
Retailers can play their part in catalysing the implementation of the Agreement on Fisheries Subsidies through numerous means:

- Firstly, **retailers can ensure that sourcing policies do not violate or stand in contradiction to the agreed text.** This is a due diligence measure that may require a specialised approach with dedicated resources, but few retailers for this report stated that examining the subsidies benefitting a potential fishery was already a key step in the design of their seafood procurement policy.
- Secondly, **retailers can directly advocate for the proper implementation and evolution of the agreement**. Directly, retailers – such as those in the UK – can use their leverage within groups such as the Global Tuna Alliance or the Sustainable Seafood Coalition to lobby governments for a quick, transparent and effective delivery of the agreement in practical terms, and for the continued evolution of the agreement's text. Ward and Phillips (2008) note that lobbying activities for sustainability by the fishing industry have often been able to translate proactive action for sustainability into legitimacy and authority in the supply chain.[69] However, lobbying for the elimination of harmful subsidies might not address the ongoing unfair competitive advantages that large industrial fisheries can create in supply chains. A more proactive approach would therefore be for retailers to address these issues within their own supply chains where possible.

In the context of small-scale fisheries, Song *et al.* (2020)[59] make a series of recommendations that retailers and retail consortiums could present to governments that would help protect small-scale fisheries from trade policy on harmful subsidies and IUU fishing, while also supporting commercial interests:

- Dedicated provisions should be made in international, regional and national IUU-related policies and regulations that **acknowledge that small-scale fisheries have an important role to play** in supporting food security and local economies. Making such provisions would constitute an important step in providing adequate access to resources and markets as stipulated by SDG14.b.

Figure 12. Retailers' policies to eliminate IUU fishery products (left) and harmful subsidies (right)



- The global community may consider **advocating for a multilateral framework** whereby IUU fishing control targets take into account differences in each country's economic status and administrative and technical capacity.

One potential pathway, for instance, could be to enhance ongoing debates on harmful subsidies at the WTO, where subsidies may be allowed in support of non-IUU-related small-scale fisheries. Such a flexible and more equitable strategy could allow for providing increased capacity-building financing to small-scale fisheries, thus allowing them to conform with many of data gaps currently preventing retailers from sourcing from small-scale fisheries.

BOX 7. SUBSIDIES IN TUNA FISHERIES

A study of tuna fishing fleets operating in the western and central Pacific Ocean found that eight developed countries, among the 29 countries operating in the region, brought in 60% of the total landed value (the monetary value of fish brought to shore) and were responsible for more than half of the government subsidies. Without these subsidies, it was estimated that fishing for tuna in these waters would have operated at a loss of $753.5 million in 2009, the last year for which data was available.[70] Furthermore, because the subsidies allow many of the foreign tuna fishing fleets to operate with lower costs, local fishers are often unable to compete for the resources in their own waters.

Looking forward

The momentum built during the International Year of Artisanal Fisheries and Aquaculture in 2022 is an opportunity for seafood retailers committed to sustainable development to ensure their seafood procurement strategy is adequately aligned with SDG14.b calling for small-scale fisheries' access to resources and markets. Aspects of seafood procurement strategies analysed in this report are progressive, but as the growing demand for sustainable seafood is paralleled with the limited supply of available sustainable seafood, the room to manoeuvre legitimately is narrowing. Retailers must be innovative, while guaranteeing the environmental and socioeconomic well-being of the fisheries they source from and that small-scale fisheries are part of this solution.

Acronyms

CSR	Corporate social responsibility
FAO	Food and Agriculture Organization of the United Nations
FIPs	Fishery improvement projects
FLW	Food loss and waste
IPLCs	Indigenous peoples and local communities
IPNLF	International Pole and Line Foundation
IHH	*Illuminating Hidden Harvests* report
IUU	Illegal, unreported and unregulated
IYAFA 2022	International Year of Artisanal Fisheries and Aquaculture 2022
MSC	Marine Stewardship Council
NGOs	Non-governmental organisations
SDGs	Sustainable Development Goals
SSF	Small-scale fisheries
SSF Guidelines	Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the context of Food Security and Poverty Eradication
TEK	Traditional ecological knowledge
WTO	World Trade Organization
UN	United Nations

Related reading

Arthur, R, Heyworth, S, Pearce, J and Sharkey, W (2019) The cost of harmful fishing subsidies. IIED Working Paper. IIED, London. http://pubs.iied.org/16654IIED

Appendix 1. About the retailers involved in this study

Table A1. Retailers and brands analysed, contacted and that participated in the survey and interviews

	COUNTRY	POLICY ANALYSED	CONTACTED	REPLIED	PARTICIPATED	
					SURVEY	INTERVIEW
RETAILERS						
Aeon	Japan	✓	✓	✗	✗	✗
Ahold Delhaize	Belgium	✓	✓	✓	✓	✗
Albert Heijn	Netherlands	✓	✓	✓	✓	✗
Aldi	Germany	✓	✓	✗	✗	✗
Asda	UK	✓	✓	✓	✓	✗
Alnatura	Germany	✓	✓	✓	✓	✗
BioCoop	France	✓	✓	✓	✓	✓
Carrefour	France	✓	✓	✓	✓	✓
Cencosud	Chile	✓	✓	✗	✗	✗
Chedraui	Mexico	✓	✓	✗	✗	✗
Coles	Australia	✓	✓	✗	✗	✗
Dia	Spain	✓	✓	✗	✗	✗
Edeka	Germany	✓	✓	✗	✗	✗
El Corte Inglés	Spain	✓	✓	✗	✗	✗
E. Leclerc	France	✓	✓	✗	✗	✗
Giant Eagle	USA	✓	✓	✗	✗	✗
HEB	Mexico	✓	✓	✓	✓	✗
Hy-Vee	USA	✓	✓	✗	✗	✗
ICA	Sweden	✓	✓	✗	✗	✗
Intermarché	France	✓	✓	✓	✓	✓
Lidl	Germany	✓	✓	✓	✓	✗
Marks & Spencer	UK	✓	✓	✓	✓	✓

					PARTICIPATED	
	COUNTRY	POLICY ANALYSED	CONTACTED	REPLIED	SURVEY	INTERVIEW
Mercadona	Spain	✓	✓	✗	✗	✗
Migros	Switzerland	✓	✓	✓	✓	✓
Morrisons	UK	✓	✓	✓	✓	✗
Rewe	Germany	✓	✓	✓	✓	✗
Sainsbury's	UK	✓	✓	✓	✓	✓
Soriana	Mexico	✓	✓	✗	✗	✗
Spar	Netherlands	✓	✓	✗	✗	✗
Target	USA	✓	✓	✗	✗	✗
Tesco	UK	✓	✓	✗	✗	✗
Walmart	USA	✓	✓	✗	✗	✗
Waitrose	UK	✓	✓	✗	✗	✗
Whole Foods	USA	✓	✓	✗	✗	✗
Woolworths Group	Australia	✓	✓	✗	✗	✗
Woolworths Holdings Limited	South Africa	✓	✓	✓	✓	✓
BRANDS*						
Princes	UK	✓	✓	✗	✗	✗
New England Seafood	UK	✓	✓	✗	✗	✗
Fish4Ever	UK	✓	✓	✓	✓	✓
Pompon-Rouge	France	✓	✓	✓	✓	✗
Wild Planet	France	✓	✓	✗	✗	✗

Notes: *A policy analysis was carried out for brands but was excluded from the analysis due to brands being excluded from the study.

Table A2. Valuation of high-end and mid-range retailers

RETAILER	COUNTRY	RANGE	NUMBER OF EMPLOYEES	REVENUE (MILLION €)	NUMBER OF STORES
Aeon	Japan	Mid-range	520,000	63,767.4	19,000
Ahold Delhaize	Belgium	Mid-range	232,000	74,400.0	6,769
Albert Heijn	Netherlands	Mid-range	110,000	76,602.0	1,122
Aldi	Germany	Mid-range	155,000	109,316.0	10,000
Asda	UK	Mid-range	145,000	27,309.17	633
Alnatura	Germany	High-end	3,500	1,080.0	107
BioCoop	France	High-end	3,200	1,380.0	623
Carrefour	France	Mid-range	321,383	80,730.0	12,225
Cencosud	Chile	Mid-range	126,530	12,637.7	602
Chedraui	Mexico	Mid-range	38,000	4,250.91	262
Coles	Australia	Mid-range	112,269	25,207.5	807
Dia	Spain	Mid-range	39,581	6,882.0	6,169
Edeka	Germany	Mid-range	381,000	59,964.0	13,646
El Corte Inglés	Spain	Mid-range	90,004	15,783.0	1,271
E. Leclerc	France	Mid-range	133,000	51,336.3	805
Giant Eagle	USA	Mid-range	37,000	8,033.98	474
HEB	Mexico	Mid-range	100,000	27,871.3	340
Hy-Vee	USA	Mid-range	88,000	10,898.7	240
ICA	Sweden	Mid-range	23,000	11,800.0	1,840
Intermarché	France	Mid-range	112,000	34,800.0	3,969
Lidl	UK	Mid-range	315,000	57,000.0	11,200
Marks & Spencer	UK	High-end	78,000	12,369.3	1,463
Mercadona	Spain	Mid-range	85,800	25,500.0	1,636
Migros	Switzerland	Mid-range	99,000	26,498.9	580
Morrisons	UK	Mid-range	110,000	20,917.15	497
Rewe	Germany	Mid-range	363,633	51,653.1	3,700
Sainsburys	UK	Mid-range	189,000	34,792.2	1,411
Soriana	Mexico	Mid-range	93,700	7,221.56	824
Spar	Netherlands	Mid-range	370,000	37,100.0	13,320
Target	USA	Mid-range	409,000	89,908.4	1,926
Tesco	UK	Mid-range	423,092	7,769.47	7,005
Waitrose	UK	High-end	80,000	12,398.5	332
Walmart	USA	Mid-range	2,300,000	504,578.0	10,566
Whole Foods	USA	High-end	91,000	14,361.8	500
Woolworths Group	Australia	Mid-range	215,000	41,525.5	3,000
Woolworths Holdings Limited	South Africa	High-end	45,000	4,850.79	711

Endnotes

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Sustainable Development Goal 14.b (SDG14.b) calls for providing 'access for small-scale fishers to marine resources and markets' by 2030. Small-scale fisheries directly support approximately 7% of the global population and make up 47% of the value generated by the seafood industry. International seafood markets and big retail chains are increasingly important for small-scale fisheries, providing these fisheries with opportunities that can contribute to long-term socioeconomic stability. Through seafood sourcing policies that explicitly commit to supporting small-scale fishers, retailers can make positive contributions to healthier oceans, sustainable fisheries and the well-being of coastal communities. This report explores retailers' procurement of small-scale fisheries' produce, the challenges faced and the opportunities available.

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