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This report includes financial information for 2019 and editorial content reflecting the period of January 1, 2019, through April 30, 2020.
The last year has felt like a tightrope balancing act for me, between making sure our existing work goes well and at the same time shaping SFP for the future. Recently, both tasks have been made even more challenging by the COVID-19 pandemic. The only silver lining to the COVID-19 cloud has been the change in pace from constantly travelling to getting to stay home for a while. That’s given me more time than expected to reflect on where SFP has been, how far we’ve come, and where we are going.

When we started SFP in 2006, our aim was (and still is) to ensure that 100 percent of seafood is produced sustainably. To achieve that global reach, we knew we had to engage the world’s seafood industry. Our thinking was that, if an industry can buy, process, and ship a highly perishable product like seafood from anywhere in the world, it can also work in reverse, delivering fisheries management solutions back to the source. And since seafood is the most traded commodity on the planet, that industry already reaches the majority of the world’s fisheries.

In the 14 years since our founding, SFP’s work with our partners and colleagues has transformed the seafood sector. We started by championing fishery improvement projects (FIPs) – to show retailers and importers that they could engage producers and influence fisheries management – and developed a diverse, global demonstration portfolio that showed what was possible. Next, we worked with those same retailers and importers to encourage them to take over these projects, and lead efforts to add new improvement projects throughout the world’s fisheries. We have also brought industry together, in pre-competitive Supply Chain Roundtables (SRs), to expand their influence, scale-up improvement efforts, and weigh-in on national and international fisheries management policies.

In 2017, we aligned all of these disparate industry efforts around a common priority list of fisheries and launched the Target 75 Initiative (T75), a first step toward 100-percent sustainable seafood production. We also added work on national policy platforms in seven major producer countries, to make the case for their governments to invest in fisheries management.
In these pages, you can read all about T75 and many of our victories and accomplishments throughout 2019 and the start of 2020. We began 2020 full of big plans to make a major push to engage new fisheries and partners, launch new FIPs and aquaculture improvement projects (AIPs), and rapidly expand improvement efforts worldwide.

And then the world stopped.

When the scale of the pandemic became apparent, my first concern was for our staff members, and our colleagues and partners, to make sure that everyone was alright and was safe. Once we determined that, we began to look at the scope of the disruption to our work, to fishing communities, and to the global seafood industry. As you’ll see in the section on COVID-19 impacts in this report, we quickly realized that it wasn’t going to be business as usual.

But we also knew that we couldn’t just put our work on hold and sit back and wait for the crisis to pass. We realized that most fisheries worldwide were continuing with little change and were likely to come under even more pressure as economies contracted and unemployment increased. If fish stocks collapsed or even declined, that would make a bad situation even worse for fishing communities and marine ecosystems. So we found new ways of working with governments and partners, created solutions to get around new and existing obstacles, and also added some new work to help small-scale fishers in developing countries get through these challenging times.

As an organization that has been working “virtually” since 2006, we were able to figure out how to get on with almost all of our work, despite the upheaval. While we hope travel restrictions will ease and we can resume crucial face-to-face meetings and trust building in 2021, we are looking to the future and how we can continue to move the world toward sustainable seafood.

Moving forward, we’re focusing on dealing with the tough challenges that stand in the way of fisheries improvements. One key challenge is helping developing countries build out their fisheries management systems, to regulate fisheries and combat illegal fishing at the source. Another is helping artisanal fishers work together with governments to co-manage small-scale coastal fisheries. And a third is protecting critically endangered species from the impacts of fishing. We will continue to encourage industry leadership, including developing the workplans for the next phase of Target 75, and we are also focusing on our own capacity to help industry deliver good consistent results on these tough issues.

Stay safe, be well, and I hope we will meet again sometime soon.

Jim Cannon
Honolulu, Hawaii
Dear Friends,

This is my first year as Chair of SFP’s Board of Directors, so I wanted to take a moment to introduce myself.

I have spent most of my career working in France for Davigel, a leading importer, producer, and distributor of frozen foods in France, Belgium, Italy, and Spain. As the company’s purchasing manager, I helped grow Davigel’s fish and seafood importing sector, which accounts now for almost one-third of the company’s total sales.

About 10 years ago, I was tasked with developing Davigel’s Fish and Seafood Responsible Sourcing policy. This is how I first encountered SFP. At that time, Davigel was part of Nestlé, which had a relationship with SFP.

When I retired in 2014, I stayed on as a consultant on responsible sourcing with Davigel. And the following year, much to my surprise, Jim Cannon asked me if I would be on the Board of Directors of SFP.

I was a little nervous about joining an English-speaking organization, but I figured that, since he asked, I should say yes. I am very passionate about fish and seafood, so now that I was retired and had some free time, I wanted to help improve the global sustainability of this sector.

I joined the Board in January 2016 and tried to participate as much as possible in SFP events — attending forums, retreats, and general meetings. As I learned more and met the staff, I realized that SFP has a different way of working than most traditional conservation organizations.
For me, the most important thing that sets SFP apart is that it is focused on partnering with all actors — industry, governmental and nongovernmental organizations, local fishing communities — working with them to help improve global fisheries sustainability and measure progress. SFP’s work is based on science. There is a lot of knowledge among the SFP staff and a lot of tools to help companies improve.

There is also a vision, as SFP is always thinking ahead, working to define new objectives (Target 75, for example) and putting in place practical action plans to achieve them.

I was very much surprised once again when Jim asked me if I would be the next Chair of SFP’s Board. Surely there’s been a mistake, I thought. But, again, he asked, so I said yes, why not?

I am very excited about the big changes in store for SFP in the next several years. We have made tremendous progress with our Target 75 Initiative, but now we have to define the next steps and what it will take to reach our goal of 100-percent sustainable seafood. We are working on expanding our efforts in new areas, such as small-scale fisheries and aquaculture; new categories of products, such as squid and octopus; and new parts of the world, such as Southeast Asia, South America, and Africa.

Having said that, it is impossible to ignore the impact that the COVID-19 crisis has had on our work and on the world. I was in close contact with Jim and SFP’s leadership from the start, and after we determined that the organization itself was not at immediate risk, we quickly began to speak with our donors, partners, industry, and governments around the world — to determine what would be the impacts and how we could best respond. I also participated as much as I could in staff “virtual water cooler” meetings, which SFP held weekly in the first months of the pandemic to check in and see how everyone was doing.

Despite being a virtual organization with staff all around the world, SFP is a very connected organization, and I appreciated the close contact and cooperation among staff members in various countries.

I look forward to the future, as SFP continues to adapt to the changing dynamics in the fish and seafood sector and in the world.

Jean-Louis Meuric
Dieppe, France
Sustainable Fisheries Partnership (SFP) is dedicated to delivering healthy marine and aquatic ecosystems and a secure seafood supply through the creation of a responsible seafood economy.

We are working toward a world where all seafood is plentiful and sustainable, and 100 percent of seafood is produced sustainably.

To achieve this goal, we engage the most significant seafood retailers, brands, and foodservice companies to catalyze their global supply chains and drive actions to rebuild depleted fish stocks, reduce the environmental impacts of fishing and fish farming, and ensure sustained economic opportunities for fishing communities worldwide.
SFP’S APPROACH TO SUSTAINABLE SEAFOOD

We take a broad, global approach to achieve the greatest impact possible, by:

- **Mobilizing improvements** in as much of the world’s production as fast as possible

- **Creating leadership on sustainability by** the seafood industry, producers, and others with a principal stake in the future of the world’s fisheries and fish farms

- **Producing many examples of improvement efforts**, even if the quality of these efforts varies, rather than a few with exceptionally good practice
Our approach has the following key advantages:

- **It reassures the world’s largest seafood buyers** that change is coming at a scale commensurate with the size of their global businesses, and gives them confidence to stay the course.

- **Success in key sectors** enables partners to make firmer and more public commitments over time.

- **Working at a global scale** has attracted more of the supply chain to participate, as the business value of doing so has been demonstrated.
HOW WE GET RESULTS

SFP utilizes a unique and proven set of methods and tools to achieve our goals.

Supplementary Chain Roundtables
SFP innovated the concept of Supply Chain Roundtables (SRs) in response to the need for enhanced industry cooperation created by the proliferation of fishery and aquaculture improvement efforts around the world and the multitude of supply chain companies engaged in sustainability initiatives.

SRs bring together major buyers and importers of seafood in a particular sector to activate and monitor fishery improvement projects (FIPs) and aquaculture improvement projects (AIPs) across species and countries. These companies work pre-competitively to scale-up their individual fishery improvement efforts and jointly advocate for better fisheries policy and management with government officials, regulators, and resource managers.
Mexican Seafood SR members sign code of conduct for Mexican shrimp

A number of companies in SFP’s Mexican Seafood Supply Chain Roundtable (SR) signed on to the Mexican Shrimp Council’s new code of conduct.

Participating companies pledge to only source legal shrimp and not buy from any fishing areas or gear that threaten protected or endangered species such as vaquita and turtles (and require their processing plants to do so as well). They also commit to conduct audits on all purchases to ensure legality and implement full traceability all the way back to the boats.

This adds to SFP’s work with the largest US importers of Mexican shrimp to use control documents and audits for processing plants, to ensure no illegal shrimp is co-mingled with legally caught shrimp.
**Fishery Improvement Projects**

SFP was a pioneer in the use of fishery improvement projects (FIPs) to address environmental challenges in a fishery. A FIP brings together players within the supply chain (retailers, processors, producers, and/or fishers) to demand and leverage better management of marine resources. The FIP identifies the environmental issues that need to be addressed, sets the priority actions that should be undertaken, and oversees the action plan adopted by the participants. FIPs are structured, collaborative multi-year initiatives with detailed workplans and regular milestones for evaluating progress.

Unlike traditional advocacy approaches that ask leading retailers and restaurants to avoid seafood from poorly managed fisheries, FIPs address the root causes of fishery depletion and create a path to long-term viability and productivity. FIPs engage and activate the supply chain, leveraging the power of the private sector to drive action to improve fisheries sustainability.

SFP has been a strong proponent of industry leadership in fishery improvement efforts. Today, more than half of the world’s FIPs are industry-led.

**Aquaculture Improvement Projects**

In recent years, SFP has begun to champion aquaculture improvement projects (AIPs), multi-stakeholder efforts to address environmental challenges in aquaculture production. Like FIPs, AIPs use the power of the private sector to incentivize positive changes toward sustainability and seek to make these changes endure through policy change.

AIPs operate at scales greater than the farm level to drive necessary change, focusing on the adoption and implementation of policies that require sustainable practices and improved performance at the farm and zonal scales.
## HOW WE GET RESULTS

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Sources: Sustainable Fisheries Partnership, CEA Consulting (2020), FishSource

1 Decrease in number of Supply Chain Roundtables reflects merging of some SRs for efficiency.
Cumulative production from stocks associated to all FIPs, current and historical

(million tonnes)

Source: Sustainable Fisheries Partnership
FIP Evaluation Program and Progress Ratings

For more than a decade, SFP has been a leader and innovator in evaluating fisheries improvement. Created by SFP, the FIP Evaluation Program defines and assesses fishery improvement projects (FIPs) against six stages of achievement, including development of the FIP structure (Stages 1 and 2), implementation (Stage 3), improvements (Stages 4 and 5), and Marine Stewardship Council (MSC) certification (Stage 6).

Our FIP Progress Ratings system is the first and only methodology that applies time benchmarks to quickly understand the rate at which a fishery is improving and assign a related letter grade. Each FIP receives a rating, ranging from an “A” grade of Exceptional Progress to an “E” grade of Negligible Progress.

SFP’s progress ratings is the lead metric of FisheryProgress.org, the online platform where FIPs are publicly reported and reviewed. Our FIP progress ratings are also widely used by the seafood industry and factor into their decision making; for example, some companies will only buy seafood from a FIP with a “C” grade or higher. In turn, this influences and drives further improvements in specific fisheries.
Science, Data, and Transparency
An essential element of our work is that industry must be transparent about seafood sourcing and improvement efforts and publicly report performance so that stakeholders, such as investors and consumers, can monitor the accuracy of corporate claims. To help our partners achieve this goal, SFP offers a set of seafood services that provide objective and credible scientific data on fisheries and aquaculture, to help inform industry and guide decision making.

FishSource and Metrics
FishSource covers nearly 40 percent of global landings and an estimated 80 percent of what is sold at retail in North America and Europe.

SFP created and maintains the FishSource database, a one-of-a-kind public web platform that contains profiles on thousands of fisheries. This data is processed and made available to industry through a customized system called Metrics.

Together, these information tools keep seafood companies comprehensively briefed on the sustainability of the most important parts of their seafood portfolios and provide guidance regarding the effectiveness of improvement efforts and any additional measures that might be required.
Ocean Disclosure Project

Voluntary disclosure of sustainability performance can be a powerful tool for driving change in global supply chains. To facilitate transparency in seafood sourcing, SFP created the Ocean Disclosure Project (ODP), an online reporting platform where companies can disclose their seafood sourcing.

For companies, the ODP provides a simple way to use a common template to answer the question: “Where does my seafood come from?”

For responsible investors, NGOs, and seafood consumers, the ODP provides a one-stop resource to freely access all ODP profiles and other seafood-sourcing disclosures, examine the sourcing practices of disclosing companies, identify any environmental risks associated with their seafood sources, make informed buying or investment decisions, and hold businesses accountable for their sustainability commitments.

The Ocean Disclosure Project (ODP) expanded its format in 2019 to include seafood sustainability ratings from a wider range of nongovernmental and governmental sources, including the Monterey Bay Aquarium’s Seafood Watch program, Ocean Wise, the Marine Conservation Society’s Good Fish Guide, and the NOAA Fish Stock Sustainability Index (FSSI), as well as the data based on SFP’s FishSource scores that were used in past disclosures.

The ODP also welcomed six new participants: UK retailer Tesco, Faroese salmon farming company Bakkafrost, UK salmon specialist JCS Fish, US seafood supplier High Liner Foods, US retailer Food Lion, and US frozen seafood importer, manufacturer, and distributor Beaver Street Fisheries. These businesses joined more than 20 other companies from North America, Europe, and Australia who already disclose their seafood-sourcing through the ODP.

28 companies who have participated in the ODP
TARGET 75

SFP’s Target 75 Initiative (T75) is a dedicated, large-scale effort toward achieving sustainability in some of the world’s largest and most visible seafood sectors. We launched T75 in 2017 as a first step toward achieving our goal of 100-percent sustainable seafood.

The aim of T75 is to ensure that 75 percent of seafood in 13 key sectors (by volume) is either sustainable or making regular, verifiable improvements. The sectors include small shrimp, large shrimp, coldwater crab, swimming crab, shelf-stable tuna, fresh and frozen tuna, salmon, whitefish, mahi-mahi, reduction fisheries, snapper and grouper, squid, and octopus.

These sectors were selected in collaboration with leading retailers and seafood companies, and include major sectors of importance to markets and consumers. Agreeing on a set of fisheries to focus on also provides an efficient and effective way for companies to respond to disparate customer requests and individual corporate concerns.

Together, the T75 sectors cover most of the main types of seafood consumed in North America and the European Union, and a significant portion of what is consumed in Japan, accounting for more than 50 percent of wild seafood production worldwide.

“Before T75, Publix focused on our own supply chain and sustainability goals. Now, with T75, we’re looking at the bigger picture, seeing the need for sustainability beyond ourselves, and we’re re-energized to focus at a global scale. ”

Guy Pizzuti
Category Manager – Seafood
Publix
Status of Target 75 Sectors and Impact of COVID-19 on T75 Progress

2020 Projection | Impact of COVID-19*

*This represents the projected additional progress that would have been achieved without the impacts of the COVID-19 pandemic.

Source: Sustainable Fisheries Partnership
Target 75 Progress
Since its launch in 2017, Target 75 has produced significant improvements in many seafood sectors. This progress has come about through increased alignment and action by seafood supply chain actors in our Supply Chain Roundtables (SRs). The SRs have had broad success in engaging key producers, encouraging them to launch and lead fishery and aquaculture improvement projects (FIPs and AIPs), supporting project implementation, monitoring progress, and intervening where necessary to ensure results.

Two sectors have met and surpassed the T75 goal, including reduction (small pelagic) fisheries, which made significant early progress in getting new FIPs launched, and coldwater shrimp fisheries that supply small shrimp.

Other sectors are making solid progress to the 75-percent goal. In mahi, existing FIPs are working together to solve international shared-stock management problems. In shelf-stable tuna, new FIPs have been launched and many more are being established.

Several sectors with success in launching new FIPs saw their efforts slow due to COVID-19-related restrictions. These include squid and octopus, both of which started virtually at zero, and fresh and frozen tuna.

Salmon, large shrimp, and tilapia and pangasius (part of the whitefish sector) are T75 sectors dominated by farmed fish production. They are advancing, but are hampered by a lack of progress with national governments to improve zonal or area-based aquaculture policies, regulations, and enforcement.

The blue swimming crab sector successfully established industry-led FIPs through its Supply Chain Roundtable equivalent, the NFI Crab Council. However, these are mostly small-scale fisheries with little to no fisheries management, presenting challenges to future progress.
The **snapper and grouper** sector made great progress in launching new FIPs and expanding existing FIPs to the national level. However, these fisheries are across many countries, with much of their production destined for domestic markets. Future progress will depend on engagement with local buyers and other actors.

**Wild whitefish** and **coldwater crab** have struggled recently. In both, significant fisheries have lost their MSC certificates. Dedicated Supply Chain Roundtables are needed to bring major players together to press for fishery improvement, monitor progress, and use targeted market interventions to help keep them on track.
Squid industry advances to Target 75

Only a few years ago, there was no squid production anywhere in the world that met the T75 criteria. Our Global Squid Supply Chain Roundtable (SR) has been working to change that. Today, 14 percent of global squid volume qualifies as sustainable or improving, and work in additional fisheries could add as much as 43 percent more global volume to that.

Much of this improvement was driven by the Committee for the Sustainable Management of the Southern Pacific Jumbo Flying Squid (CALAMASUR), an industry-led group of squid producers, processors, and exporters from Chile, Ecuador, Mexico, and Peru that is working to advance improvements at the regional level. SFP provides technical and scientific support to the organization.

In February 2020, CALAMASUR achieved an important victory when the South Pacific Regional Fisheries Management Organization (SPRFMO) issued the first Conservation and Management Measure (CMM) for jumbo flying squid in international waters. The CMM will implement new actions regarding vessel monitoring systems, catch reports, a biological monitoring system, increasing observer coverage, and including Peruvian artisanal vessels in the registry for international waters that is monitored by SPRFMO.
Target 75 Champions

Industry leadership is a crucial part of our Target 75 Initiative. This is exemplified by the companies that have become T75 Champions — pledging their support by name and through sponsorship of the initiative. We thank our Target 75 Champions for their continued support and commitment to sustainably produced seafood.

For a sponsorship of $10,000 or more, a company can become a T75 Champion, which includes the following benefits:

- Company name and logo on a dedicated T75 Champions page on the SFP website
- Recognition in select Target 75 publications and at events such as the Seafood Expos in Boston and Brussels, and other trade shows
- Use of the SFP and Target 75 logos on corporate publications and at trade shows (within logo-use guidelines)
- Opportunities to participate in and receive recognition at other global Target 75 events.

If your company is interested in becoming a T75 Champion, please contact us at info@sustainablefish.org.

In 2019-20 SFP welcomed six new T75 Champions, including US- and Italy-based seafood importer and distributor PanaPesca; Canary Islands-based seafood processor and distributor Grupo Unión Martin; French fish oils producer OLVEA; US frozen seafood importer, manufacturer, and distributor Beaver Street Fisheries; US frozen seafood importer The Fishin’ Company; and French tuna supplier Fish is Life.
Making seafood truly sustainable

SFP’s work has fundamentally changed seafood production and institutionalized seafood sustainability among the world’s largest and most influential retailers, foodservice providers, and seafood companies. We are making meaningful progress toward the goal of 100-percent sustainable seafood through our Target 75 initiative. However, FIPs have not consistently solved some important problems, including:

- Protecting marine biodiversity, particularly endangered, threatened, and protected species
- Engaging governments to control illegal fishing, stop overfishing, and improve fishery management
- Ensuring small-scale fishers are formally recognized and empowered to effectively participate in co-management
- Engaging governments to control the environmental impacts of aquaculture through effective planning and management.

As we embark on this next phase, we are launching new, dedicated initiatives to tackle these tough issues, with our usual focus on increasing industry capacity and leadership.
“Moving forward, SFP will demonstrate solutions for these tough issues in a few fisheries and countries, then build industry capacity to advance these approaches around the world.”

Blake Lee-Harwood
Programs Division Director
**Seafood industry continues to initiate new fishery improvement projects**

SFP has promoted industry leadership in the global sustainable seafood movement since our founding. One of the main achievements of this effort has been the emergence of industry leadership of fishery improvement projects (FIPs) as the norm worldwide. In 2019, two key industry-led FIPs were established and listed on FisheryProgress.org.

**The Mexico Yucatan octopus — drift rod and line FIP** covers octopus fishing off the coast of Mexico’s Yucatan peninsula. This FIP will develop a stock assessment methodology; increase knowledge about interactions with endangered, protected, and threatened (EPT) species; strengthen management and monitoring; and address enforcement. SFP’s Global Octopus Supply Chain Roundtable (SR) is providing support to the project.

**The Morocco anchovy — purse seine FIP** covers anchovy fishing off the coast of Morocco. It is working on a harvest control rule, improving data quality and quantity, and evaluating the fishery’s impact on the marine ecosystem. The FIP is funded by several industry stakeholders and driven by the sustainability commitments of buyers from the United States, Europe, and Africa.
In January 2020, the Indonesia Indian Ocean and Western Central Pacific Ocean tuna — longline fishery improvement project (FIP) was officially launched. SFP worked with industry in Indonesia, the world’s largest producer of tuna, to launch this new industry-led, national-level FIP covering Indonesian longline tuna fisheries. The FIP is being implemented by the Indonesian Longline Tuna Association (ATLI).

The FIP covers albacore, yellowfin, and bigeye longline fisheries in the Indian Ocean, and yellowfin and bigeye longline fisheries in the Western Central Pacific Ocean, in both the Exclusive Economic Zone (EEZ) of Indonesia and international waters.

The project aims to improve data collection, increase onboard observer coverage, strengthen research and monitoring, and achieve MSC certification.

This FIP follows SFP’s analysis that larger-scale FIPs are needed to offer economies of scale for effective improvement in the world’s tuna fisheries, and national-scale implementation is necessary to leverage governments to invest in fisheries management.

SFP’s Fresh and Frozen Tuna Supply Chain Roundtable (SR) is providing support to this FIP.
New SFP report finds strong progress, but urgent need to engage Southeast Asian reduction fisheries

A new SFP report found that the reduction fisheries sector, which supplies the fishmeal and fish oil industry, has made substantial progress toward responsible sourcing in Europe and Latin America, but there is still a critical need to develop and expand improvement efforts in Southeast Asian fisheries.

SFP’s 2019 Reduction Fisheries report reviewed the management of the leading European and Latin American reduction fisheries. The report concluded that 88 percent of the volume comes from fisheries that are at least “reasonably well-managed.” However, Southeast Asian fisheries, which represent nearly half of the global catch in this sector, were not included in the analysis. These fisheries are poorly understood and face persistent environmental and social challenges.

SFP forges new aquaculture collaboration

To get more farmed seafood on the path to sustainability, SFP is collaborating with the Aquaculture Stewardship Council (ASC) and Monterey Bay Aquarium’s Seafood Watch Program (SFW). We are working to integrate our various approaches, improve communication, and facilitate data sharing to reduce costs for producers and provide clearer information throughout the supply chain.

This new collaboration began with a Standards and Data Mapping Study comparing our three approaches and identifying opportunities for coordination on assessments.

Using the results of the study, we will design and test new approaches to aquaculture improvement through two pilot aquaculture improvement projects (AIPs) in Indonesia and Vietnam.
Working with the Seafood Certification & Ratings Collaboration (C&R), SFP developed the **Sustainable Seafood Data Tool.** As an online, publicly available resource, the new Data Tool measures the sustainability of seafood worldwide by providing a clearer picture of the environmental and social performance of different seafood sources.

The tool includes sustainability-related data from all five C&R members: Monterey Bay Aquarium’s Seafood Watch Program, Sustainable Fisheries Partnership, Aquaculture Stewardship Council, Marine Stewardship Council, and Fair Trade USA. Initially, the tool relied on the T75 initiative for its structure, and was then built out to include other certified and rated species.

The tool provides information on rating and certification status, whether a fishery or seafood farm is improving through a targeted project, and if sustainability improvements are needed in a specific fishery or seafood farm. Users can filter the data by wild or farmed, region, or country.
SFP promotes seafood sustainability around the world

Before COVID-19 put a halt to face-to-face meetings, SFP was active in reaching out to industry and bringing stakeholders together to facilitate learning and exchange across the globe.

SFP kicked off the week at Seafood Expo North America (SENA) in Boston in March 2019 with a well-attended event on Target 75. We hosted seven different Supply Chain Roundtable (SR) meetings with representatives of more than 115 different companies and organizations. On the Expo floor, the SFP booth was a central point for discussions and meetings.

SFP’s Global Fisheries and Aquaculture Forum brought together more than 100 participants from industry, NGOs, and development agencies in February 2019 in Miami. A key highlight was a high-level dialogue with McDonald’s Corporation about their sustainability commitments and history with SFP. Panel discussions featured SFP experts and industry leaders from companies including Netuno, Publix, and High Liner Foods.

SFP took part in the first-ever Seafood Lima show in Peru in November 2019. SFP held sessions on Peruvian fishery improvement projects (FIPs) and training on the sustainable seafood movement and market incentives. SFP and Fishwise held a workshop on the Seafood Import Monitoring Program (SIMP) for Peruvian exporters.
SFPP had a strong presence at the May 2019 Seafood Expo Global in Brussels, where we connected with many partners and colleagues.

SFPL presented Target 75 at the Tokyo Sustainable Seafood Symposium in November 2019, highlighting the pioneering work of our UK, European, and North American partners and the importance of the Japanese market to global seafood sustainability.

SFPI hosted an event in Spain in June 2019, to connect visiting delegates from Ecuador, Indonesia, and the Philippines with government, port authorities, fishers, and others in the Galician fishing industry. Galicia is internationally recognized for its fisheries governance systems.

SFPII presented Target 75 at the Tokyo Sustainable Seafood Symposium in November 2019, highlighting the pioneering work of our UK, European, and North American partners and the importance of the Japanese market to global seafood sustainability. SFPI and Culinary Collaborations hosted a session on the Global Fresh and Frozen Tuna Supply Chain Roundtable (SR) to promote participation by Japanese companies.
IMPACTS OF THE COVID-19 PANDEMIC

No accounting of 2019 and 2020 would be complete without an understanding of how the global COVID-19 pandemic affected fishers and fish farmers, the seafood industry, and SFP, and how we responded to this crisis.

As the world grappled with the impacts and implications of the pandemic, and our employees navigated the challenges of national lockdowns and additional demands at home, we quickly saw that the crisis provided both challenges and unexpected openings to advance conservation and sustainability.

Our top priority was caring for our employees and staff and helping to protect the health and safety of fishers and seafood industry workers. We also focused on supporting our producer and supplier partners as they faced supply chain disruptions and changing markets, while encouraging them to protect seafood sustainability.
What do you do when the government is closed? COVID-19 and the "new normal"

The pandemic put an abrupt halt to travel, meetings, and in-person communication, and SFP had to rapidly adapt our in-country, on-the-ground field work on seafood sustainability. In Indonesia, our field team pivoted from face-to-face meetings to convening and conducting virtual meetings with government officials, industry groups, and fisher groups.

Although nothing can fully replace in-person interaction with stakeholders, this “new norm” had some key added benefits. Virtual meetings had higher than usual participation, especially by high-level government officials — and brought more viewpoints and thorough discussion to the table.
Our first hint that things were about to change came in March 2020, when the annual Boston seafood show was canceled. Though we had all been monitoring the news about the COVID-19 pandemic for weeks and trying to understand what it meant, this was the moment when we truly realized that business — and life — as we knew it was about to be very different.

Each year, the Seafood Expo North America (SENA) trade show in Boston is where we officially kick off what we at SFP refer to as “meeting season.” This is where we hold many of our annual Supply Chain Roundtable (SR) meetings, have a major event on our Target 75 initiative, and meet face-to-face with our partners and colleagues.

When SENA was first canceled, we thought we would just be able to reschedule our meetings, particularly with our industry partners and collaborators, as virtual gatherings and webinars by the end of the month.

But within a week, the full extent of the impact became apparent.

Our retail partners were suddenly swamped and rushing to restock as panicked buyers stripped their shelves of canned and frozen seafood. Many of our foodservice and restaurant partners saw their trade disappear overnight as businesses closed. Our supply chain partners, including many SR participants, were caught in the middle, scrambling to meet retail demand or make up for the loss of their restaurant customers.

With all of this upheaval and uncertainty in the world, and in the seafood supply chain, we were initially concerned that sustainability might take a back seat to business survival. Would some companies pull back on their sustainability commitments and programs?

Instead, our partners rose to the challenge. They not only stuck to their commitments, but went above and beyond when needed.
For example, suppliers that usually sell to restaurants began to approach our partners asking if they would buy their excess stocks. Some of these suppliers did not have sustainability commitments as rigorous as those of suppliers who sell to retailers with public sustainability standards. Our partners worked hard to vet new suppliers and fisheries against their commitments — even though this might mean it would be harder to keep their store shelves stocked.

During the COVID-19 crisis, our partners not only held to their existing standards, but were leaders on sustainability issues to ensure progress continued.

When SFP raised the issue of suspended fishery observer coverage on tuna vessels as a result of the pandemic, they rallied around a letter calling on the world’s governments for electronic monitoring on all vessels. And in the midst of the pandemic, one of our biggest partners (and one of the world’s largest retailers) announced broad new sustainability standards for its canned tuna line.

As we have adjusted to the current situation, we are having more regular meetings with partners virtually, rather than waiting for the opportunity to meet in person. And ultimately, we even managed to reschedule and host every single one of our missed SR meetings.

**Promoting Responsible Fisheries in COVID-19 Recovery**

As a result of the COVID-19 pandemic, there already are and will continue to be massive financial flows from international institutions, such as the World Bank, International Monetary Fund, and regional development banks, to help countries reconstruct their economies.

Fisheries need to be included in these reconstruction and restructuring efforts. However, these investments need to be made in ways that will help those most in need, protect fish stocks, and promote long-term resource sustainability.

SFP is working to help inform these global relief efforts so that the most vulnerable fishers are not forgotten and missed, and ensure that “emergency” assistance to the fishery sector does not exacerbate overfishing, prevent the rebuilding of stocks, or undermine other management objectives.
Lessons learned from the 2004 tsunami for COVID-19 response
By Purbasari Surjadi, Chief of Staff

On December 26, 2004, a powerful earthquake in the Indian Ocean triggered a tsunami that hit Aceh, the northwesternmost province of Indonesia. The tsunami lasted only 30 minutes, but it killed more than 200,000 people.

At the time, I was working on conservation finance, disbursing small grants to NGOs in Aceh.

Two weeks after the tsunami, I went to Banda Aceh, the capital of Aceh Province. It took me almost 12 hours to get there, three times longer than the usual trip. People were camped along the main road. There were body bags piled in soccer fields. Army and police were everywhere. Big tents with big international names were dotted around. But mostly, there were sad, despairing, and confused people everywhere.

The COVID-19 pandemic has made me think again about the Aceh tsunami, and the many things we learned in its aftermath that can help shape our response to this current crisis.

The key lesson is the importance of coordination and leadership. In my dozen trips to Banda Aceh over the course of a year, it became clear that without this, even the best intentioned efforts could go wrong. Aceh received around $7.7 billion in aid after the tsunami. There was a rush to build medical camps and housing for refugees. But there was no coordination of where and how the houses should be built, leading to huge variations and conflict over who got the better houses.

The second lesson is the need to listen to local people. We need to understand where they are coming from and what their priorities are at a given time. The tsunami left thousands of Aceh fishers unemployed when their boats, nets, and other fishing equipment were washed away. An international NGO donated boats as part of its assistance program, but those boats were never used, because the fishers knew they were too light for the waves and wind in Aceh.

Nobody ever asked them what they needed to rebuild their lives. And this may be very different from what we and outside organizations think they need.
In April 2020, at-sea observer programs in tuna fisheries were suspended, due to concerns about the spread of COVID-19. In response, SFP brought together more than 50 retailers, brands, and seafood companies (see below) to call on the world’s governments to implement electronic monitoring to protect workers and ensure the continued sustainability of tuna fishing.

In a letter sent to the 45 country members of the Regional Fisheries Management Organizations (RFMOs), the international government bodies responsible for managing tuna fisheries, the companies called for electronic monitoring to be used as an accepted alternative to human observer coverage. Although the electronic technology already exists, governments and RFMOs have been slow to adopt its use.

“We are key stakeholders in these fisheries and strongly wish to see the environmental impact of these fisheries managed in a manner consistent with our procurement specifications for sustainable sourcing,” the companies wrote. The letter also called for greater transparency in implementation of electronic monitoring, and regular reviews of the current situation and risks of restoring human observer coverage.

Our letter was positively received by the RFMOs and country delegations, including direct responses from the United States and European Union, among others.

The following companies joined SFP in calling on governments to implement electronic monitoring in international tuna fisheries:


*Represents 11 companies
We were already virtual. But was it enough?

By Andrei Kliemenko, Chief Operating Officer

Since our founding, SFP has always been a virtual organization. Our dozens of staff members around the world work from home, and most of our daily meetings and internal collaboration have always taken place online.

So, when the COVID-19 pandemic hit and the rest of the world started to transition to working virtually and from home, we thought, “We’ve got this!”

In many ways, we did “have this.” But this crisis also challenged us in unique ways.

At first we thought we might have less work as a result of disruptions among our partners. However, it quickly became apparent that wasn’t the case. Many staff members found themselves working more hours than before and competing for home office space, while trying to care for children and dealing with the heightened anxiety of the pandemic.

Our operational response focused on supporting staff in the face of the pandemic, supporting our programs, and facilitating effective communication to our staff and donors.

As an organization, our main programmatic focus was scrambling to come up with a “Plan B”—switching strategies to address the immediate needs of the seafood community and trying to understand the implications of the crisis for our partners and colleagues.

Although we are a virtual organization, we have still always conducted a lot of business through face-to-face interaction. In many places, we had to adjust how we communicate with fishers and other stakeholders with limited access or experience with online technology.

And this is where our history and experience mattered. Other organizations had to expend time and energy trying to figure out how to work virtually. But we could focus on how to adjust our strategy, understanding what work had to be delayed or canceled, and determining what alternative activities we should focus on instead.

We also found that some fundamental functions, such as relationship and trust building, are much harder to do remotely. This has helped us build a greater appreciation for personal contact, with our partners and stakeholders, and in our own SFP community.

At SFP, we know that our staff members are our greatest asset, so as the crisis escalated, first and foremost, we wanted to support our employees and make sure they know that the
Early on, our leadership decided to offer the option of emergency response paid leave, allowing staff to take time off for any COVID-related disruption without having to worry about loss of sick time or vacation days. This paid leave allowed staff to first focus on immediate concerns of health, family, and personal needs, and to return their focus to work once these priorities were addressed.

Our human resources team and leadership were heavily involved in communication to staff members, and also focused on identifying and tracking what was happening in the various countries where our employees live. And as we watched the impact of the pandemic on other NGOs, keeping staff updated on SFP’s financial health was important, so they could focus on professional and personal priorities, rather than worrying about security of their jobs.

Moving ahead, we are excited to keep finding ways to improve our ability to operate as a virtual organization — and look forward to meeting up with our colleagues from around the world once again.

SFP develops widely used COVID-19 resource page

SFP created an online resource page to provide information on how to protect fishers and seafood workers during the COVID-19 crisis. We compiled and shared guidance from international organizations, governments, industry associations and companies, NGOs, and other experts.

One of the most significant resources featured on the page was a series of infographics and handouts developed by jumbo flying squid fishery stakeholders from Paita, Peru. Working with CALAMASUR (The Committee for the Sustainable Management of the Southern Pacific Jumbo Flying Squid), local fishers and health experts created a series of user-friendly, easy-to-understand materials, initially for small-scale and artisanal fishers in Latin America.

International demand quickly followed, and SFP helped translate and distribute the CALAMASUR materials into English, French, Arabic, Japanese, Tagalog, Portuguese, Russian, and Chinese.
SFP works toward a future where all seafood worldwide is sustainable and ocean ecosystems are thriving. But we can’t do it alone. We have long benefited from the generous support of a number of private foundations and international development agencies, all with an eye toward a sustainable future.

As a registered nonprofit, our success depends on like-minded individuals. If you or your organization are interested in contributing to our work, contact SFP at info@sustainablefish.org.

**2019 DONORS AND FUNDERS**

Aquaculture Stewardship Council/ISEAL Innovations Fund  
BAND Foundation  
Margaret A. Cargill Philanthropies  
Certification and Ratings Collaboration  
John Ellerman Foundation  
The Global Environment Facility (GEF)  
IDH, The Sustainable Trade Initiative  
The Mitsubishi Corporation Fund for Europe and Africa (MCFEA)  
Oceans 5  
The David and Lucile Packard Foundation  
The PEW Charitable Trusts  
Resources Legacy Fund  
Sea Pact  
Skoll Foundation  
United Nations Development Programme (UNDP)  
United Nations Food and Agriculture Organization (FAO)  
United States Agency for International Development (USAID)  
University of Rhode Island Coastal Resources Center  
Walmart Foundation  
Walton Family Foundation
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Aldi Australia  Cooperative Food UK  McDonald’s  Sam’s Club  Walmart Canada
Aldi UK & Ireland  Fortune International  Meijer  Seattle Fish  Walmart Central America
Aldi US  Frinsa del Noroeste  Morrisons  Sysco France  Walmart Chile
ASDA  Giant Eagle  Nueva Pescanova  Super Indo  Walmart Mexico
Auchan Retail Spain  Grupo Profand  Nestlé  Tesco  Walt Disney World
Beaver Street Fisheries  High Liner Foods  Publix  US Foods
Congalsa  Jealsa  Sainsbury’s  Walmart US

JOIN SFP

Does your company have an interest in improving sustainable seafood sourcing? Do you know of a fishery or aquaculture operation that might benefit from an improvement project?

Our partnerships with industry leaders are vital to our ongoing mission of building a more sustainable global seafood industry. SFP partners share our interest in long-term seafood sustainability, are committed to the continuous improvement of fisheries and fish farms, and encourage supplier participation in our Supply Chain Roundtables.

SFP partner companies have access to resources to support their commitments, including SFP’s Metrics system to assess supply chain risks and track sustainability progress, as well as partner-only briefings, webinars, forums, and key opportunities to network with industry thought leaders.
FINANCIALS 2019

Revenue $7,616,735
- Foundation Grants 13%
- Corporate Contributions 1%
- Government Grants 12%
- Other Income 1%

Expenses $7,712,357
- Program Services 83%
- Management & General 16%
- Fundraising 1%
### Sustainable Fisheries Partnership Foundation (A Nonprofit Organization)
#### Statement of Activities
**Year Ended December 31, 2019**

<table>
<thead>
<tr>
<th>Support and Revenue</th>
<th>Without Donor Restrictions</th>
<th>With Donor Restrictions</th>
<th>Total</th>
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<tr>
<td>Foundation and government grants</td>
<td>$ 515,000</td>
<td>$ 6,085,251</td>
<td>$ 6,600,251</td>
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<tr>
<td>Corporate grants and sponsorships</td>
<td>765,384</td>
<td>137,710</td>
<td>903,094</td>
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<tr>
<td>Contracts</td>
<td>92,960</td>
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<tr>
<td>Other contributions</td>
<td>1,172</td>
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<td>1,172</td>
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<tr>
<td>Registration fees and other income</td>
<td>19,258</td>
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<td>19,258</td>
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<tr>
<td>Net assets released from restrictions</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Expiration of time restrictions</td>
<td>1,000,000</td>
<td>(1,000,000)</td>
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<tr>
<td>Satisfaction of purpose restrictions</td>
<td>5,318,340</td>
<td>(5,318,340)</td>
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<tr>
<td><strong>Total support and revenue</strong></td>
<td><strong>7,712,114</strong></td>
<td><strong>(95,379)</strong></td>
<td><strong>7,616,735</strong></td>
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#### Expenses

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<tbody>
<tr>
<td>Program services</td>
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<tr>
<td>Supporting services</td>
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<tr>
<td>Management and general</td>
<td>1,201,228</td>
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<tr>
<td>Fundraising</td>
<td>94,960</td>
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<td>94,960</td>
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<tr>
<td><strong>Total expenses</strong></td>
<td><strong>7,712,357</strong></td>
<td>–</td>
<td><strong>7,712,357</strong></td>
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<tr>
<td>Change in net assets</td>
<td>(243)</td>
<td>(95,379)</td>
<td>(95,622)</td>
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#### Net Assets

<p>| | | | |</p>
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<tr>
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<tbody>
<tr>
<td>Beginning of fiscal year</td>
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<td>4,120,800</td>
<td>5,143,813</td>
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<tr>
<td>End of fiscal year</td>
<td>$ 1,022,770</td>
<td>$ 4,025,421</td>
<td>$ 5,048,191</td>
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</table>
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Fish Vet Group Limited
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