



FROM SEA
TO CAN

2018

SOUTHEAST ASIA

Canned Tuna Ranking



GREENPEACE

TABLE OF CONTENTS

p03	EXECUTIVE SUMMARY
p06	INTRODUCTION
p10	CANNED TUNA TRADE
p14	EMERGING ISSUES
p16	CANNERY RANKING AS A GAME CHANGER
p18	METHODOLOGY
p20	SPECIES CAUGHT
p21	GEAR USED
p24	COMPANY PROFILE
p37	RECOMMENDATIONS FOR TUNA COMPANIES
p40	GLOSARRY
p42	END NOTES



ACKNOWLEDGEMENTS

Written by:

Ephraim Batungbacal &
James Mitchell

Special thanks to:

Arifsyah Nasution
Anchalee Pipattanawattanakul
Korawan Buadoktoom
Annisa Dian Ndari
Therese Salvador
Vince Cinches
Oliver Knowles
Sebastian Losada

Layout:

Aprilia D. H

Illustrations:

Ramadhani

Photos:

Alex Hofford
Jiri Rezac
Jurnasyanto Sukarno
Oscar Siagian
Paul Hilton
Sanjit Das

Printed on 100% recycled paper
Release: December 5, 2018

EXECUTIVE SUMMARY

Greenpeace is running an international campaign to steer the global tuna industry towards more environmentally and socially responsible sourcing.

Greenpeace has ranked the performance of canned tuna companies in other countries like Australia, the US, UK, and Canada. In Southeast Asia, the primary source for tuna exported globally, we aim to change the way the tuna industry views consumers here in the region. We firmly believe that consumers based in the region deserve to have the same choices as customers in the European Union (EU) and North America when it comes to purchasing a can of responsibly-caught tuna from their local supermarket. Greenpeace Southeast Asia encourages canneries and brands to swiftly improve their traceability systems, shift towards sustainable and worker-friendly sourcing practices, and be transparent with customers along the way.

This report comes at a time when tuna stocks globally are experiencing intense pressure from destructive fishing practices and overfishing. Slavery at sea and human rights abuses are rampant in distant water fishing fleets found in every part of the world. It is vital that we protect our oceans, and the tuna fishing and processing sector is an important part of the success of this campaign.

This is the third version of Greenpeace Southeast Asia's Tuna Cannery Ranking. We evaluated nine canned tuna brands in Thailand, seven tuna canneries in Indonesia, and seven tuna canneries in the Philippines. In a span of three years, considerable progress has been made by these tuna processing companies in working towards a more traceable, sustainable, and worker-friendly canned tuna industry. Nonetheless, there is still more work to do across the board to fully meet these goals.

KEY FINDINGS

Greenpeace consistently uses a seven point criteria to rate companies on their tuna sourcing practices. Each criterion is given weight indicating relevant importance. The criteria include:

- Sustainability (30%)
- Sourcing Policy (25%)
- Traceability (10%)
- Legality (10%)
- Driving Change (10%)
- Equity (7.5%)
- Transparency and Customer Information (7.5%).

The overall rating, which is either Good (green), Fair (yellow), or Poor (red), indicates the total score for all seven criteria.

After three years of continuous and collaborative dialogue, we now have five companies with an overall Good (green) rating. These are Alliance Select Foods International, PT International Alliance Foods Indonesia, PT Samudra Mandiri Sentosa, PT Sinar Pure Foods International, and Tops Supermarket.

The top performers for **Traceability**, with scores ranging from 85 - 100% are General Tuna Corporation, Seatrade Canning Corporation, Tops Supermarket, Nautilus / Seacrown, Super C Chef, Roza, and Aro.

For **Sustainability**, the top companies with scores ranging from 85- 100% are General Tuna Corporation, Philbest Canning Corporation, PT International Alliance Foods Indonesia, PT Samudra Mandiri Sentosa, PT Sinar Pure Foods International, PT Citra Raja Empat Canning, and Tops Supermarket.

Almost all participating companies (16 out of 23) are in the green zone for **Legality**, while only four companies are green in the **Equity** criteria. The main concern of this criterion is the welfare of workers employed directly by the company or on board

SEVEN-POINT CRITERIA:

**TRACEABILITY****SUSTAINABILITY OF CURRENT SOURCING****LEGALITY****EQUITY/SOCIAL****SOURCING POLICY****TRANSPARENCY AND CUSTOMER INFORMATION****DRIVING CHANGE**

THE BRANDS WERE RANKED ON A SCALE OF 1-100

**70-100 = GOOD****0-39 = FAIR****40-69 = POOR****DID NOT PARTICIPATE**

suppliers' fishing vessels.

In the **Sourcing Policy** category, companies can learn from the example set by Super C Chef, which had the highest score for this category.

In the **Transparency and Customer Information** category, the top performers with scores ranging from 75 - 100% are Tops Supermarket and Alliance Select Foods International.

In the **Driving Change** category, the top performers with grades ranging from 60 and 100 percent are General Tuna Corporation, PT Samudra Mandiri Sentosa, PT Sinar Pure Foods International, Tops Supermarket, Nautilus / Sea Crown and Sealect / Ocean Wave.

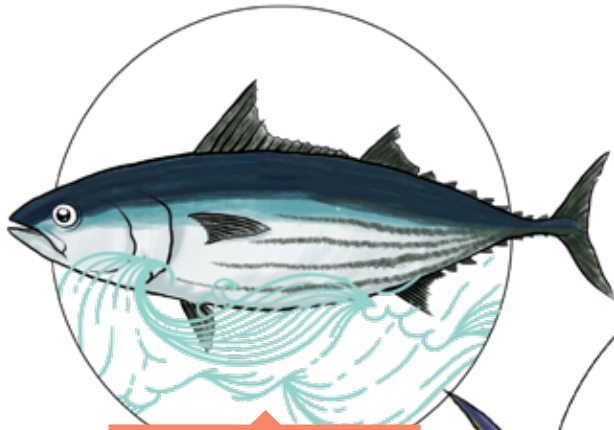
In general, most of the companies are shifting procurement from purse seiners to more sustainable fishing practices like FAD-free purse seine, handline, and pole and line fishing. Eleven companies source from pole and line vessels, while another eleven source from FAD-free fishing vessels. Only four companies source handline-caught tuna. Unfortunately, most companies are not transitioning swiftly enough in response to the state of our oceans.

In terms of species procured, 20 companies use Skipjack, 17 companies use Yellowfin, five use Bigeye, four companies use Tonggol, and two companies use Albacore.

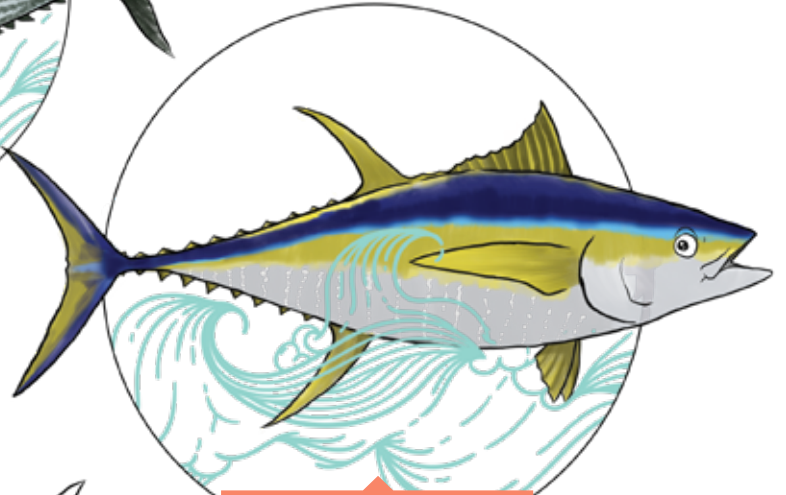
However, some companies are also procuring from Taiwanese longline fishing vessels where some fishing fleets have been involved in human trafficking at sea. Companies are urged to be mindful of their supply chain as one case of human rights abuse in any fishing vessel in the high seas is one too many.

While most companies declared that they have third-party auditors, most of their auditors are either government or food processing auditors. Seven companies have yet to develop their own official websites. Even where there are official websites, sometimes the companies do not post their policies, which makes it difficult for consumers to evaluate them. For purposes of this evaluation, all internally-held policies were required to be submitted to Greenpeace for review in order to receive any credit for the contents therein.

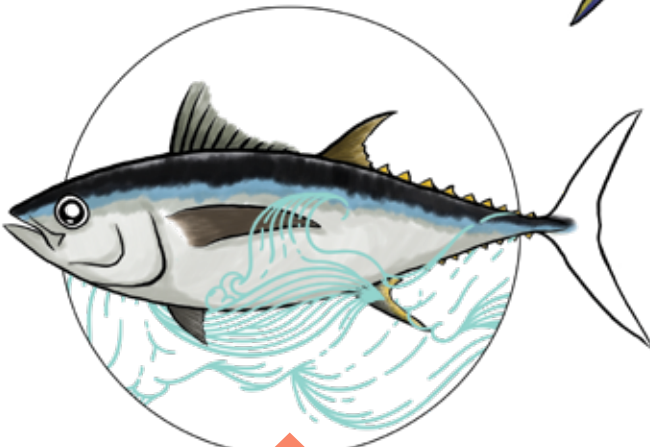
The issue of a "double standard," as observed in our 2016 report, is still evident. Some companies exercise stringent rules which cater to the country of destination. For example, a can of tuna sold within Thailand will usually have little (if any) information on what kind of tuna is in the can. That same company may also sell another one of its more sustainably-sourced tuna products, under a different label destined for the United States, for example, with more sourcing information on the label. As consumers in Southeast Asia begin to understand that they have the power to protect our oceans "one can at a time," the same sourcing standards and information available to consumers in other markets must apply regardless of where the product is sold.



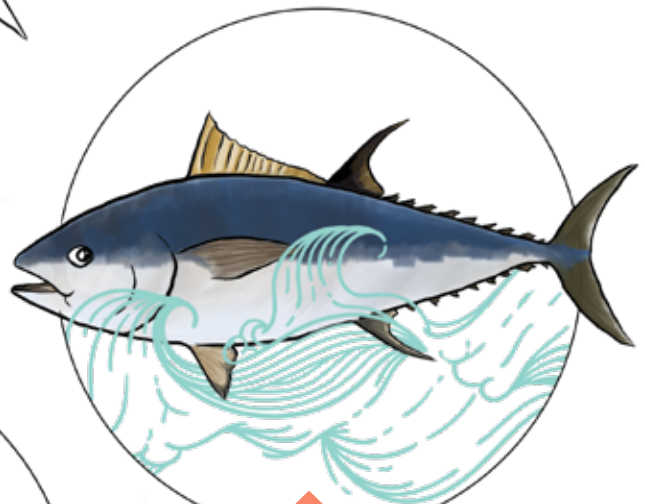
**20 COMPANIES
USE SKIPJACK**



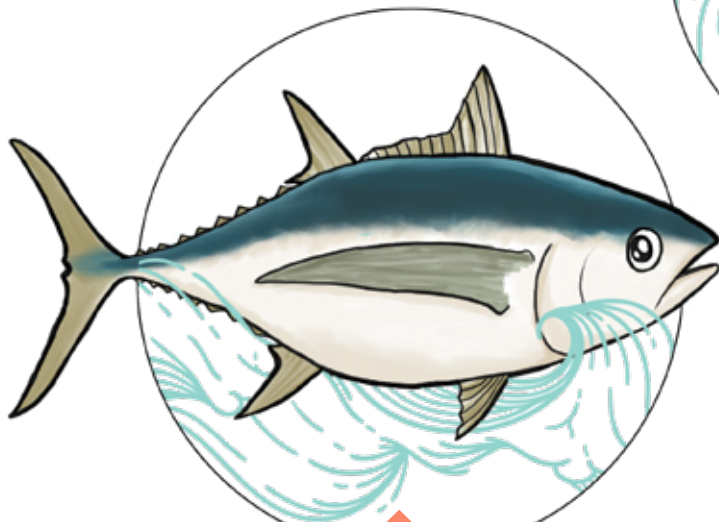
**17 COMPANIES
USE YELLOWFIN**



**5 COMPANIES
USE BIGEYE**



**4 COMPANIES
USE TONGGOL**

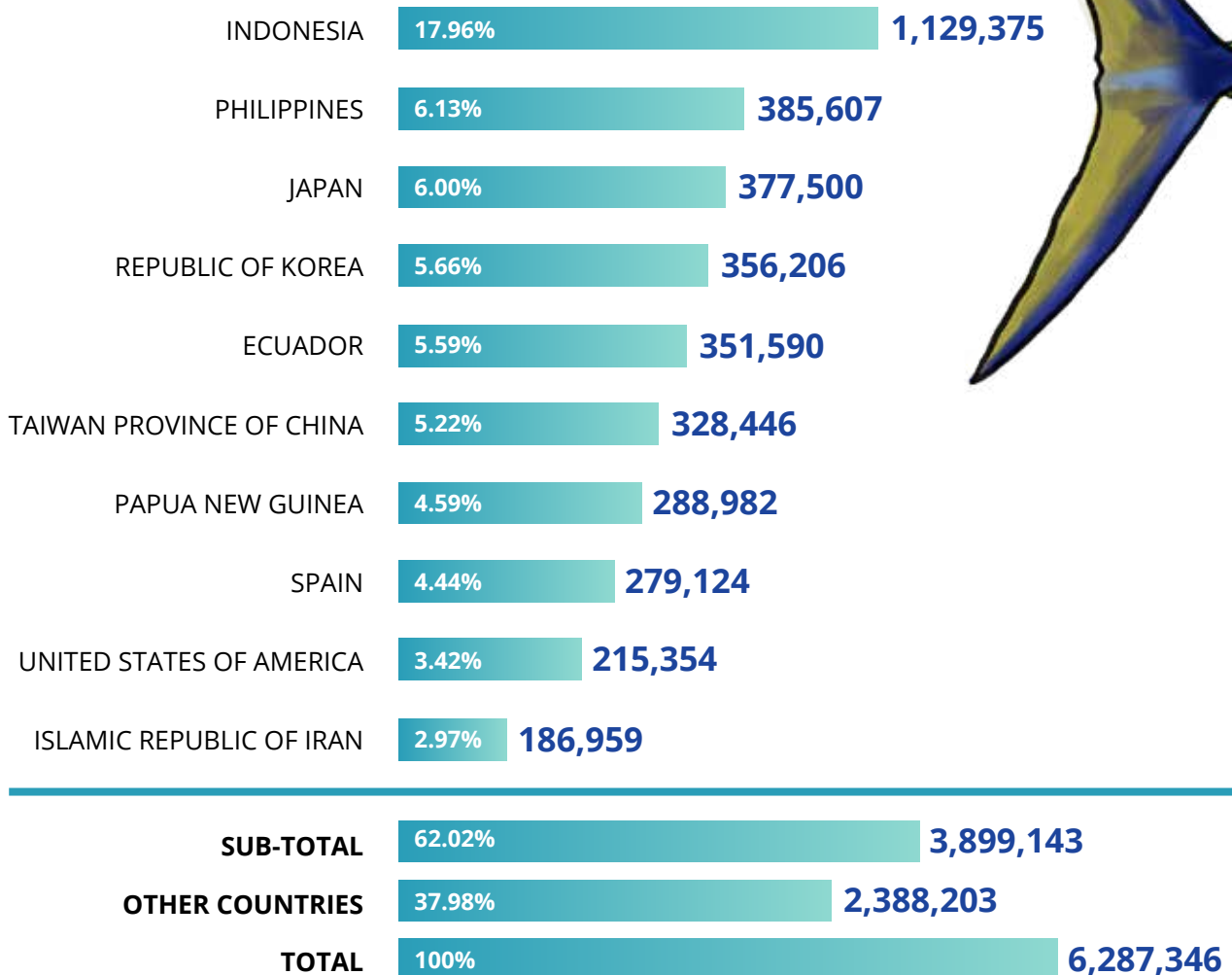


**2 COMPANIES
USE ALBACORE**

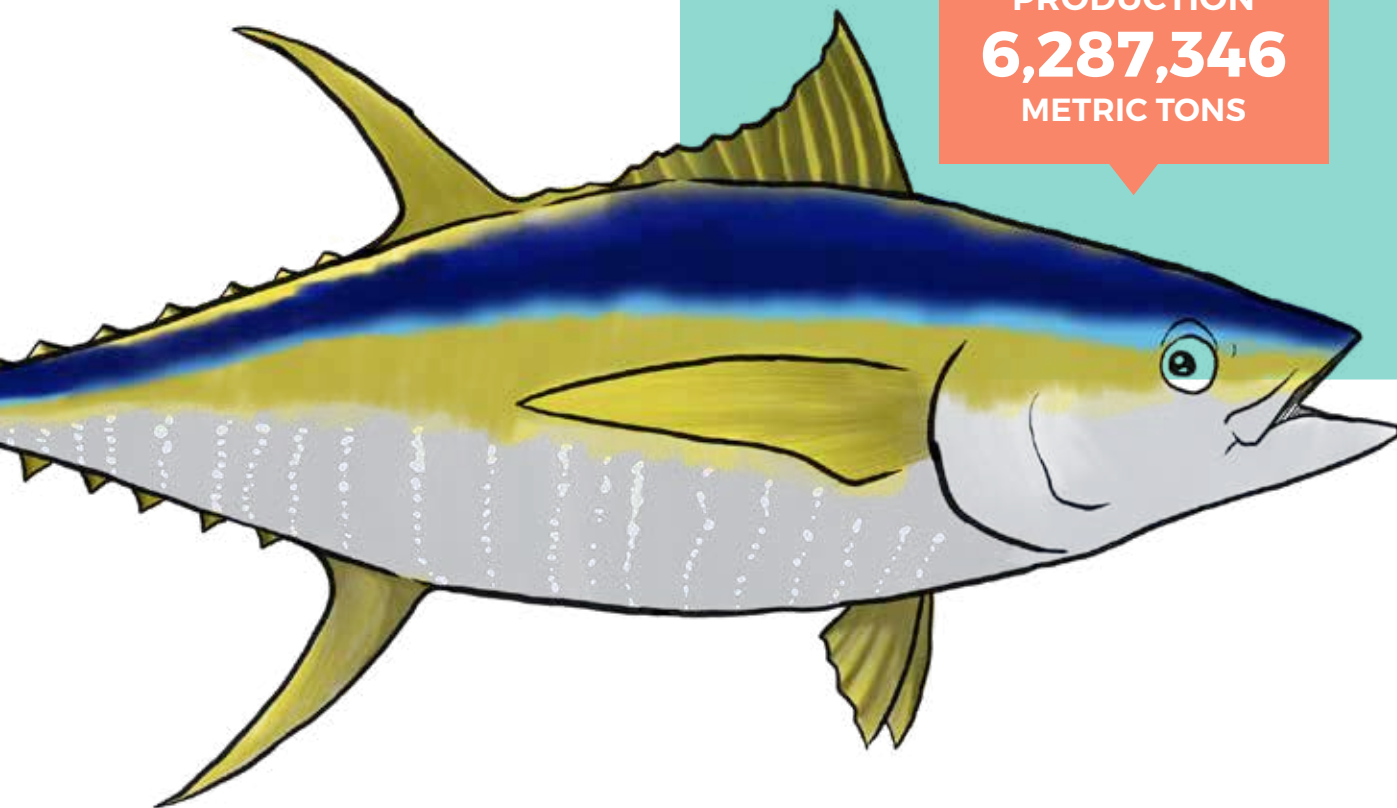
INTRODUCTION

Tuna is amongst the most economically valuable fish in the world as well as an important predator species in marine ecosystems.¹ The tuna industry provides thousands of jobs in the catching, processing, and trading sector worldwide, including in many developing coastal states, and generates significant revenues in terms of access fees.

WORLD TUNA PRODUCTION 2016 (METRIC TONS)



Source: FAO (2016)



2016

WORLD TUNA
PRODUCTION
6,287,346
METRIC TONS

Globally, commercial tuna is worth about USD 42 billion per year and a quarter of that figure goes to the fishermen who target the fish.²

The top five tuna producers in the world in terms of catch are Indonesia, Philippines, Japan, Ecuador, and South Korea.

IUCN RED LIST

The International Union for Conservation of Nature's (IUCN) Red List³ has listed Albacore (*Thunnus alalunga*) and Yellowfin (*T. albacares*) as "Near Threatened,"^{4,5} Bigeye (*T. obesus*) and Pacific Bluefin (*T. orientalis*) as "Vulnerable,"^{6,7} Atlantic Bluefin (*T. thynnus*) as "Endangered,"⁸ and Southern Bluefin (*T.*

maccoyii) as "Critically Endangered."⁹ Most of the companies in this report are catching one or more of these species of tuna. Skipjack (*Katsuwonus pelamis*) is of least concern¹⁰, while an assessment has yet to be made for Longtail tuna (*T. tonggol*)¹¹.

Earlier this year, a wide consortium of global tuna buyers, non-governmental organizations (NGOs), and fishing industry associations issued a call to regional fishery management organizations that they adopt more stringent rules on harvest strategies, fish-aggregating devices, bycatch limits, catch monitoring and control, and surveillance.¹²

Greenpeace adopts the precautionary approach - a “set of agreed cost-effective measures and actions, including future courses of action, which ensures prudent foresight, reduces or avoids risk to the resources, the environment, and the people, to the extent possible, taking explicitly into account existing uncertainties and the potential consequences of being wrong.”¹³

WESTERN CENTRAL PACIFIC OCEAN

In 2016, provisional total tuna catch from the Western Central Pacific Ocean was 2.718 million metric tons (mmt), of which 1.858 mmt came from purse seine, while 0.232 mmt came from longline. Of the total catch, 1.812 mmt is Skipjack, 0.650 mmt is Yellowfin and 0.153 mmt is Bigeye tunas.¹⁴ Total catch value was estimated at USD 5.3 billion. Economic value for the purse seine catch was USD 2.8 billion, while for longline it was USD 1.5 billion.¹⁵

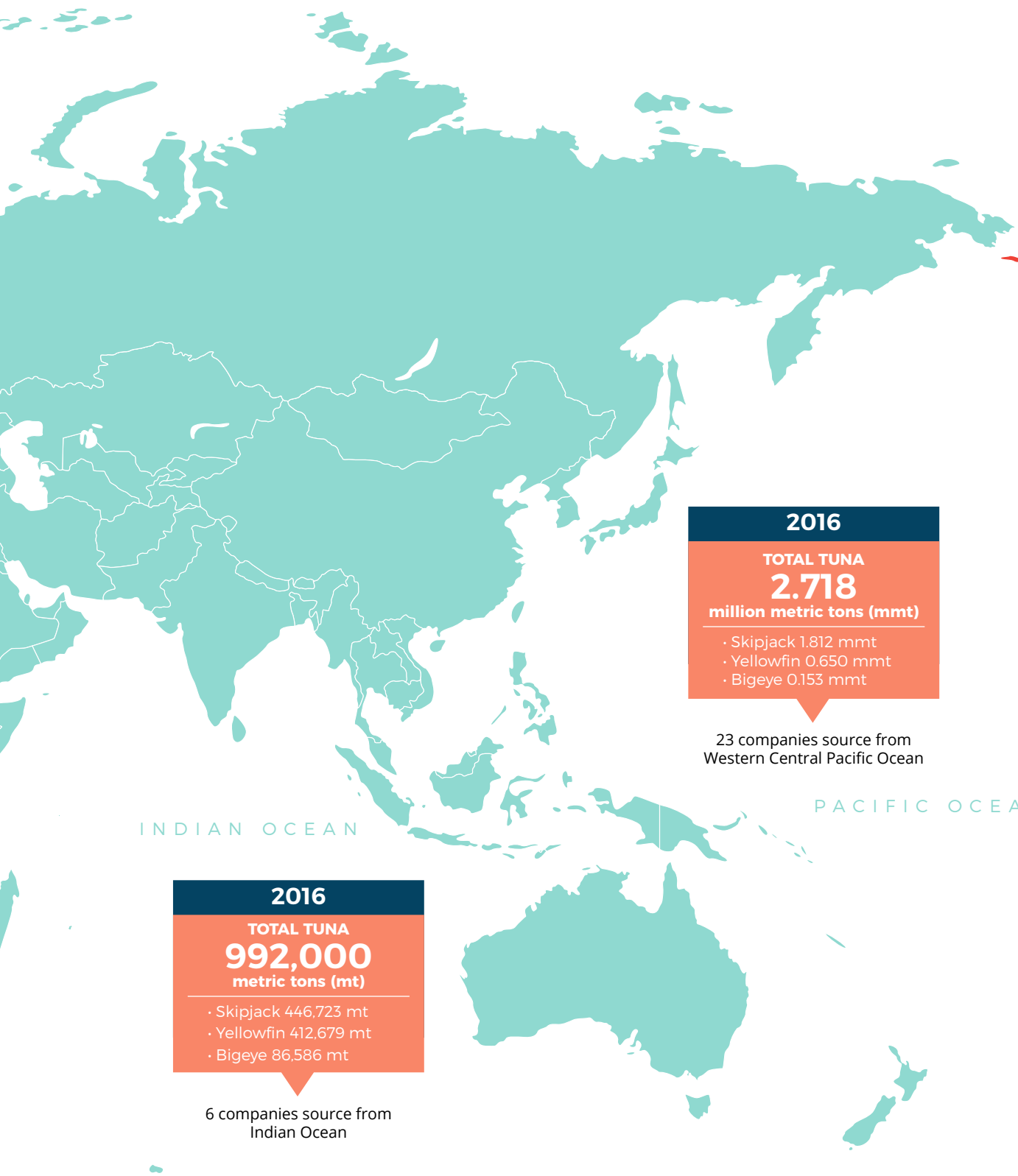
According to the Science Committee of the Western Central Pacific Fisheries Commission, there is no overfishing for Skipjack, Yellowfin, Bigeye,¹⁶ and South Pacific albacore.¹⁷ However, the committee’s management advice for each species urges caution.

For Skipjack, “additional purse-seine effort will yield only modest gains” and might even “result in a corresponding increase in fishing mortality for Yellowfin and Bigeye.”¹⁸ For Yellowfin, measures should be taken to “reduce fishing mortality from fisheries that take juveniles.”¹⁹ The committee recommended following the “precautionary approach” for Bigeye tuna by not fishing more than the current level.²⁰ Finally, increasing fishing effort for South Pacific Albacore “will yield little or no increase in long-term catches and result in further reduced catch rates.”²¹ It is worth noting that Indonesia and the Philippines have the highest catches of juvenile (20-50 cm) Yellowfin tuna and Bigeye.²²

INDIAN OCEAN

In the Indian Ocean, total production for tropical tunas is 992,000 mt.²³ Skipjack production reached 446,723 tons in 2016 and was not overfished nor subject to overfishing.²⁴ For Yellowfin, total production in 2016 was 412,679 tons and remain overfished and are subject to overfishing.²⁵ The Commission has an interim plan for the recovery of Yellowfin stock.²⁶





2016
TOTAL TUNA
2.718
million metric tons (mmt)

- Skipjack 1.812 mmt
- Yellowfin 0.650 mmt
- Bigeye 0.153 mmt

23 companies source from Western Central Pacific Ocean

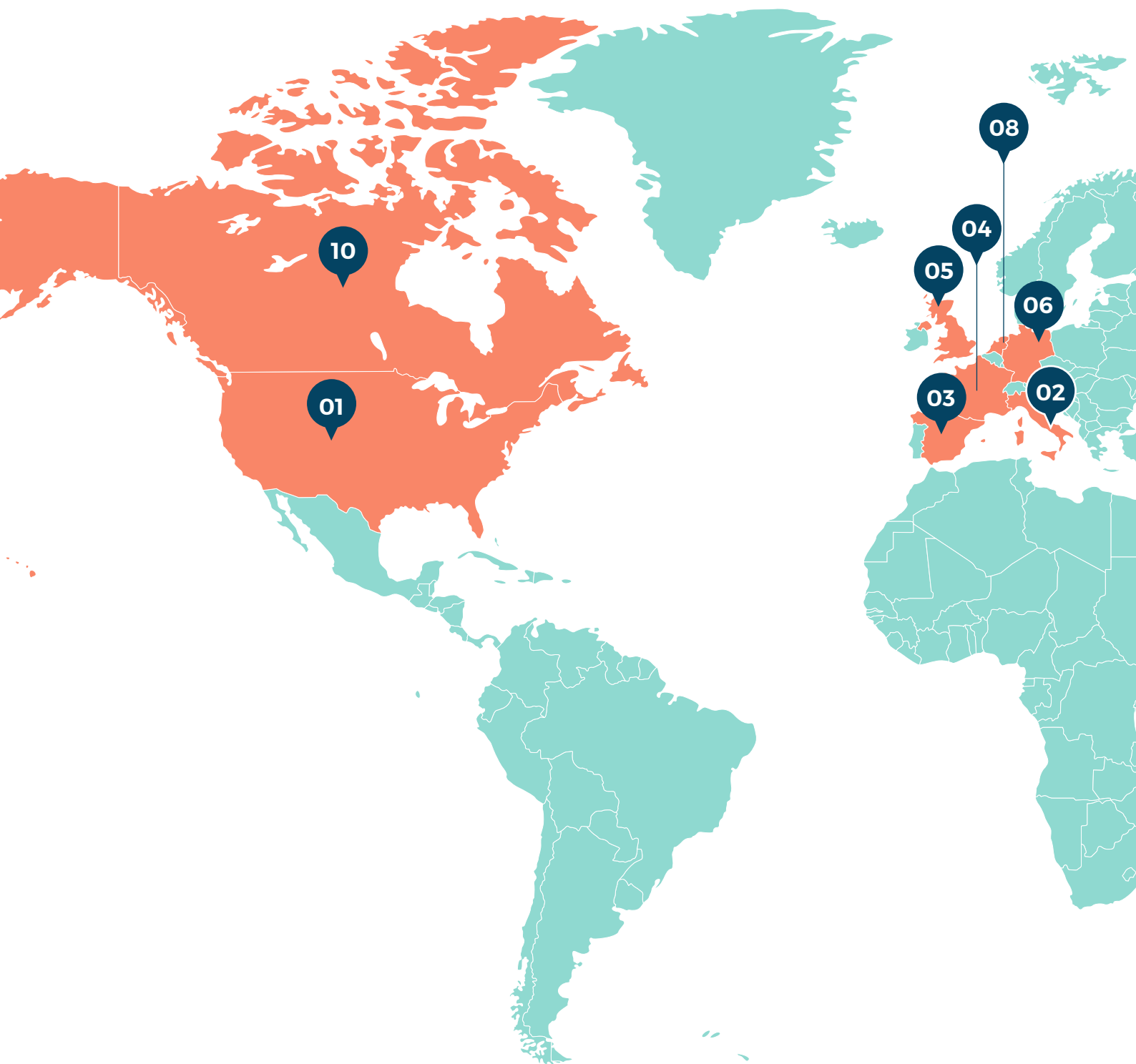
2016
TOTAL TUNA
992,000
metric tons (mt)

- Skipjack 446,723 mt
- Yellowfin 412,679 mt
- Bigeye 86,586 mt

6 companies source from Indian Ocean

SOUTHERN OCEAN

CANNED TUNA TRADE



TOP 10 IMPORTERS 2017

Prepared or preserved tunas

Around USD 7.2 billion of processed tuna were imported in 2017²⁸. The top 10 importers of processed tuna is led by the United States of America, followed by six members of the EU, Japan, Australia, and Canada.

- | | | | | | |
|----|-----------------------|------------------|----|--------------------|------------------|
| 01 | USA | US\$ 976,793,000 | 06 | GERMANY | US\$ 378,843,000 |
| 02 | ITALY | US\$ 746,283,000 | 07 | JAPAN | US\$ 346,567,000 |
| 03 | SPAIN | US\$ 622,339,000 | 08 | NETHERLANDS | US\$ 250,857,000 |
| 04 | FRANCE | US\$ 517,206,000 | 09 | AUSTRALIA | US\$ 223,072,000 |
| 05 | UNITED KINGDOM | US\$ 512,336,000 | 10 | CANADA | US\$ 148,423,000 |

Source: Trade Map

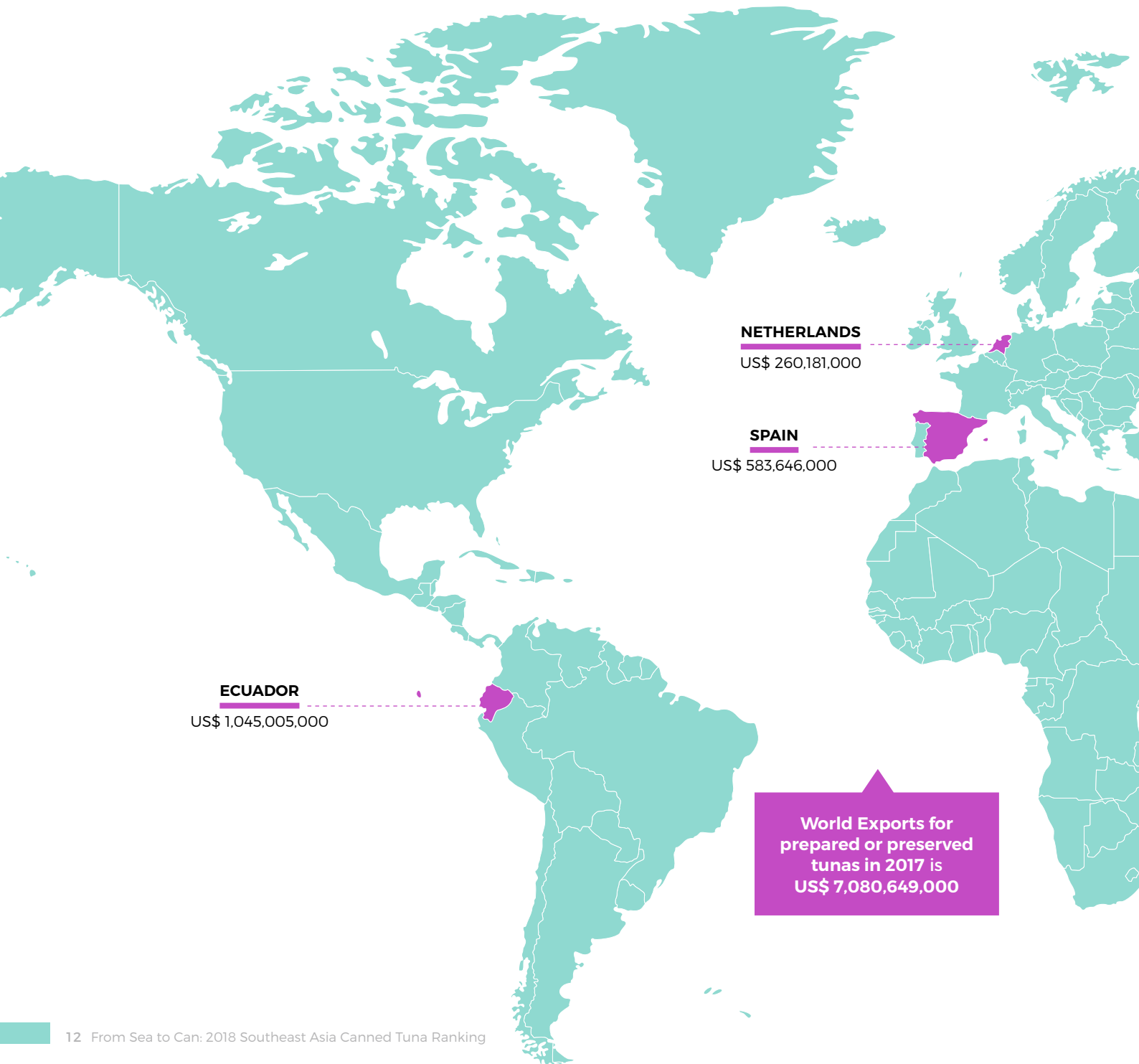


TOP EXPORTERS IN 2017

Prepared or preserved tunas

The top six largest import markets for canned tuna in 2017 were the United States, Italy, Spain, France, United Kingdom, and Germany. Thailand is the world's No.1 exporter of prepared or preserved tunas, comprising 29% of world exports for this product. Philippines is No. 5, exporting some 5.23% while Indonesia is No. 6 with exports reaching 5.07%. These Southeast Asian countries were among the leading suppliers of canned / prepared tuna to the international market by volume.

A total of USD 7 billion worth of canned tuna products was exported in 2017²⁷. Southeast Asian countries Thailand, Philippines, Indonesia, and Vietnam are among the top 10 exporters of processed canned tuna. These four countries combined make up USD 3.016 billion.



**THE TOP TEN MARKETS FOR CANNED TUNA
FOR EACH OF THE THREE PROFILED COUNTRIES**



THAILAND

United States, Australia, Japan, Canada, Libya, Saudi Arabia, Egypt, United Arab Emirates, Chile, Peru.



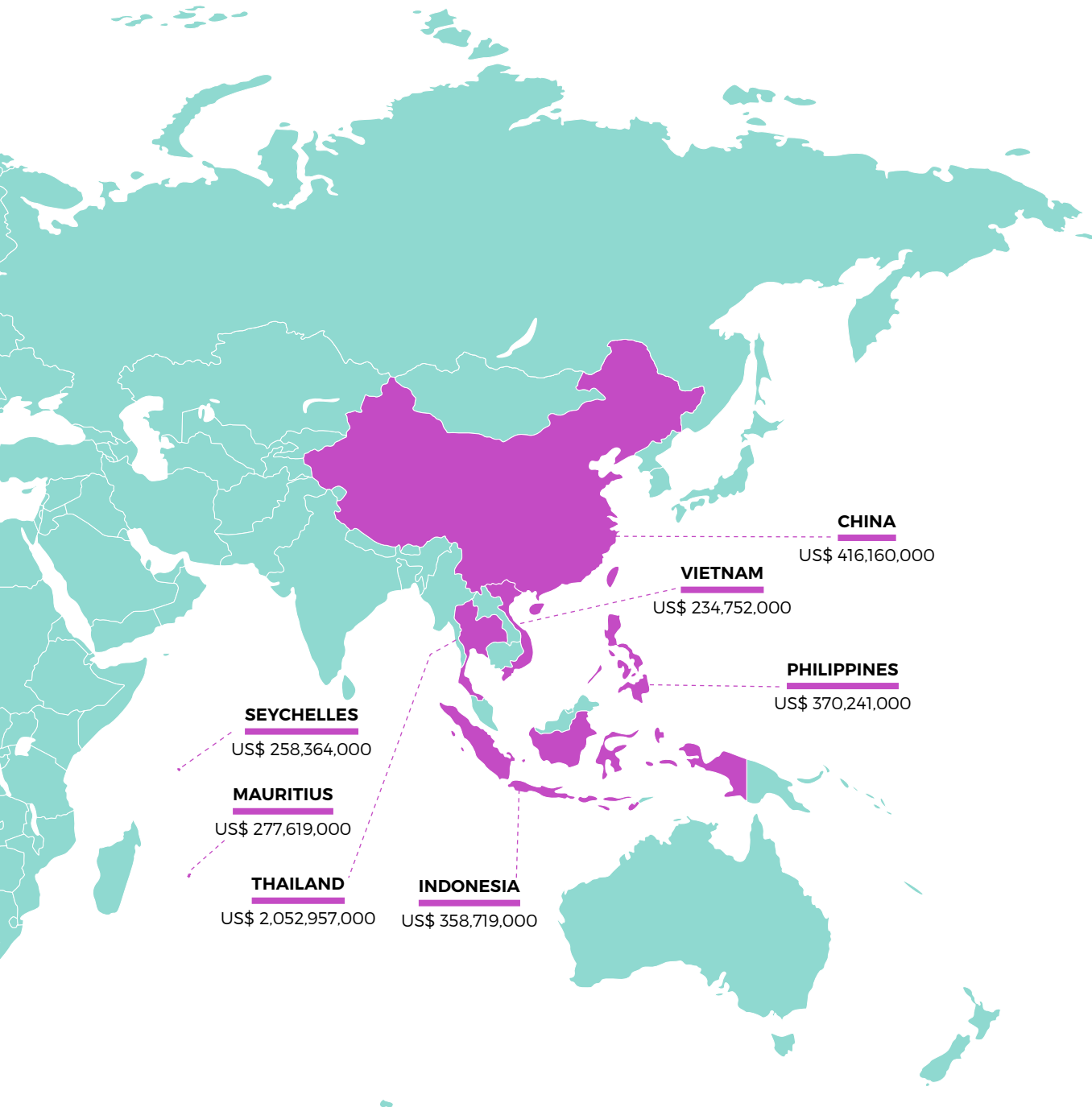
PHILIPPINES

Germany, United Kingdom, United States, Japan, Spain, Netherlands, Poland, Italy, Belgium, France.



INDONESIA

Japan, Saudi Arabia, United States, Italy, Thailand, Australia, Spain, United Kingdom, Mexico, Yemen.



EMERGING ISSUES

There are two important issues intertwined with fishing in the high seas: transshipment at sea and slavery.

Transshipment is the “act of transferring the catch from one fishing vessel to either another fishing vessel or to a vessel used solely for the carriage of cargo.”²⁹ Forced labor (slavery) is “work or service exacted from any person under the menace of penalty and for which the person has not offered himself voluntarily.”³⁰ Human trafficking, forced labor, and other human rights abuses can be facilitated by transshipment at sea because it allows fishing boats to stay out at sea and avoid detection by law enforcement.

One study³¹ explains that “a moratorium on transshipment at sea would provide the best ecological and social outcome for high seas fisheries.” It further elaborated that a “total ban on transshipment at sea is a primary way to ensure that human trafficking can be combated alongside preventing the laundering of Illegal, Unreported and Unregulated (IUU) catch.”

Forced labor is another way to reduce fishing costs.³² Workers are largely recruited by manning agencies in developing countries, where they are made false promises of compensation. There were also cases of being robbed of their documents, and sold into conditions that constitute slavery.³³

A report from Greenpeace³⁴ links human rights abuses to Taiwan’s international fishing fleet, including major seafood trader Fong Chun Formosa Fishery Company (FCF). Such findings expose the ongoing failure of the Taiwan government’s approach to address human trafficking and labor abuse.





Incidence of forced labor, child labor, or forced child labor in the seafood hub countries of Indonesia, Thailand, Vietnam, the Philippines, and Peru have been reported.³⁵ In the Philippines, Chile and Ukraine, labor agencies supply a mix of professional crew while less-skilled and lower-cost crew are recruited from countries such as Myanmar, China, Indonesia, Vietnam, and Cambodia.³⁶ Forced labor conditions have been reported in the waters of Papua New Guinea, onboard vessels operated by fleets from the Philippines³⁷ and Korea,³⁸ and also in the waters of the Solomon Islands by the Taiwan tuna fleet.³⁹

CANNERY RANKING AS A GAME CHANGER

The tuna canneries and brands in Indonesia, Philippines and Thailand are amongst the top suppliers of processed tuna in the world. Before these rankings, there was no system for consumers in these countries to verify whether companies were sourcing legally or sustainably.

Globally, Greenpeace has been conducting rankings in the US, Canada, Australia and Europe. To align with these other Greenpeace global evaluations, Greenpeace Southeast Asia (GPSEA) initiated its own version of the cannery ranking using the same methodology.

In 2014, Illegal, Unreported and Unregulated (IUU) fishing was a very important issue in the region, as the European Union slapped the Philippines with a yellow card that same year, which led to the revision of the Fisheries Code. In Indonesia, the Jokowi administration dealt with this issue by blowing up IUU fishing vessels and cancelling licenses of foreign fishing vessels. Thailand was also given a yellow card in 2015 and until now the EU has yet to be convinced of Thailand's compliance.

A key sustainability issue in the tuna industry is juvenile fishing for Yellowfin and Bigeye tuna. Juvenile fishing is closely associated with fish aggregating devices (FADs) used by purse seiners. If juvenile fishing is not addressed, there may be a shortage of larger Bigeye tuna supply and will pose problems for the ecosystem and the tuna industry. Catches of sharks, and shark finning in particular, are also a concern as fishworkers on board longline fishing vessels have engaged in shark finning. Transshipment, on the other hand, allows fishing vessels to stay longer at sea and in some cases transport workers on board or even commingle legally and illegally caught fish. Workers are forced to be at sea for longer periods of time, sometimes reaching two years before they return to port.

Greenpeace's tuna rankings evaluate canneries by checking the company's performance against a seven point criteria. Companies are also encouraged to shift to sustainable methods of fishing such as handline, pole and line, and FAD-free purse seines. While Governments in Southeast Asia are on notice to:

- (1) Accelerate the improvement of traceability;
- (2) Continue combating any IUU fishing practices;
- (3) Eliminate illegal FADs and deliver FAD management plans.

Transparency is key. During the first year of the cannery ranking exercise in 2015, most companies had not yet prioritized the need to be transparent with their customers in regards to tuna sourcing. The companies showed less enthusiasm in participating. The paltry amount of information online or at the point of sale demonstrated that canneries were not fully disclosing information so that consumers should be fully aware of what species was in the can, where it came from, what fishing gear was used, or even whether the tuna was legally caught.

Today, as a result of continuing dialogue, there has been significant progress. Companies are now more open to sharing information.

Greenpeace conducted meetings with canneries to explain the criteria, how companies are scored, and the supporting documents required. The first report⁴⁰ on Thai brands was released in September 2015, followed by a report⁴¹ on Indonesian and Philippines canneries in October 2015. These reports ranked companies as either Good, Fair, or Poor. The succeeding report⁴², released in November 2016, provided additional details by indicating the company's performance in each of the seven criteria. This system allowed companies to easily understand where they are performing well and which specific areas they need to improve on.

In anticipation of this year's report, and to give companies more time and guidance in transitioning to traceable, sustainable, and worker-friendly business, Greenpeace conducted dialogues in the last quarter of 2017. We enjoined companies to make a submission⁴³ to the Western and Central Pacific Fisheries Commission (WCPFC 14) meetings which was held in Manila in December of last year. It was the first time that canneries in the region were able to support Greenpeace advocacy at the WCPFC.

After three years of cannerly campaigning, we have achieved the following improvements:

- More companies now have tighter policies on traceability and sustainability, resulting in increased procurement of sustainably caught tuna.
- Eleven companies now source using pole and line, compared to seven in 2016.
- Eleven companies now use FAD-free purse seine, compared to five in 2016.
- Heightened awareness of issues on slavery at sea and improved measures to avoid inadvertently sourcing tuna associated with human rights and labor abuse.
- Consumers now have access to more product information, with improved labelling at the point of sale for the public to identify sustainably-caught tuna.
- Constructive dialogue with major tuna companies through regular communication.

COUNTRY	2015	2016	2018
INDONESIA	21% 3 out of 14 canneries responded	50% 8 out of 16 canneries responded	50% 8 out of 16 canneries responded
PHILIPPINES	67% 6 out of 9 canneries responded	21% 3 out of 14 canneries responded	100% 7 out of 7 canneries responded
THAILAND	64% 9 out of 14 brands responded	86% 12 out of 14 brands responded	64% 9 out of 14 brands responded
RESPONSE RATE	51% 18 out of 35 canneries responded	74% 26 out of 35 canneries responded	66% 23 out of 35 canneries responded
RESULTS	<ul style="list-style-type: none"> • All 13 canneries in Indonesia received a Poor rating. • 5 out of the 6 participating canneries (83%) in the Philippines received a Poor rating. • 9 of the 14 Thai brands (64%) received a Fair rating. 	<ul style="list-style-type: none"> • 12 canneries and 8 brands received a Fair rating. • 2 canneries and 1 brands received a Poor rating. • 22 out of 23 received a poor rating (96%) in Driving Change criteria. 	<ul style="list-style-type: none"> • 5 companies: 3 in Indonesia, 1 in Philippines and 1 in Thailand received a Good rating (22%). • 18 companies received a Fair rating. • 9 companies received a Poor rating in either Sourcing Policy, Customer Information and Driving Change.

METHODOLOGY

Greenpeace Southeast Asia contacted the top nine tuna brands from Thailand, the top seven tuna canneries from Indonesia, and the top seven canneries from the Philippines. Greenpeace requested that the companies participate in this year's survey process, and offered to help each company to accurately complete the questionnaires.



While the categories and scoring methodology for assessing each company's performance has remained the same, Greenpeace maintained strict submission of documentation to support each company's claims.

This year, Greenpeace held a series of workshops in the Philippines, Indonesia, and Thailand to present the survey again, walk companies through the process in a step-by-step fashion, and answer any questions.

Greenpeace invited companies to voluntarily participate in this survey. While laws in Indonesia, the Philippines, and Thailand do not oblige companies to participate in this survey or disclose corporate information to the public, Greenpeace believes that greater company transparency is the first step towards a traceable, sustainable, and worker-friendly tuna supply chain that would allow the public to make more informed purchasing decisions. Greenpeace does not disclose confidential business information, but rather only salient information which could help customers make an informed choice on which brands source most responsibly.

**GREENPEACE ASSESSED COMPANY PERFORMANCE AGAINST
A SEVEN- POINT CRITERIA**



TRACEABILITY

Is the tuna traceable from sea to shelf? Do audits verify that the information is accurate?



**SUSTAINABILITY OF
CURRENT SOURCING**

Did the tuna come from stocks that are healthy, and not overfished or experiencing overfishing? Was the tuna caught using fishing methods that avoid catching other marine life like sharks, turtles, or baby tuna (e.g., using pole and line)? Or was it caught using indiscriminate and irresponsible fishing methods, such as conventional longline or purse seine fishing that relies upon fish aggregating devices (FADs)?



LEGALITY

Are tuna fishing vessels involved in illegal, unreported, or unregulated (IUU) fishing? Does the tuna brand/cannery take measures to proactively verify that it is not sourcing from vessels or fishing companies that have been caught IUU fishing in the past?



**EQUITY/SOCIAL
RESPONSIBILITY**

Does the company ensure the protection of local workers and communities while ensuring a fair return of profits? Are workers being protected from labor abuse?



**SOURCING
POLICY**

Does the company show commitments and time bound implementation on sustainability?



**TRANSPARENCY
AND CUSTOMER
INFORMATION**

Does the company demonstrate transparency and promote informed customer choices?



**DRIVING
CHANGE**

Does the company support or invest in the development of more sustainable and equitable fishing?

SPECIES CAUGHT

20 OUT OF 35
COMPANIES
USE SKIPJACK



17 OUT OF 35
COMPANIES USE
YELLOWFIN



5 OUT OF 35
COMPANIES
USE BIGEYE



4 OUT OF 35
COMPANIES
USE TONGGOL



2 OUT OF 35
COMPANIES
USE ALBACORE



1 OUT OF 35
COMPANIES
USES BONITO



GEARS USED



12 OUT OF 35 COMPANIES SOURCE FROM FAD-FREE PURSE SEINE FISHING




17 OUT OF 35 COMPANIES SOURCE FROM PURSE SEINERS



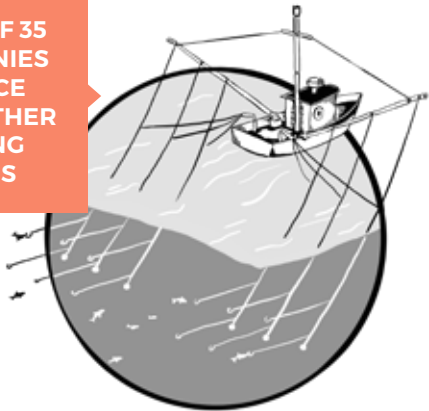
4 OUT OF 35 COMPANIES SOURCE FROM HANDLINE



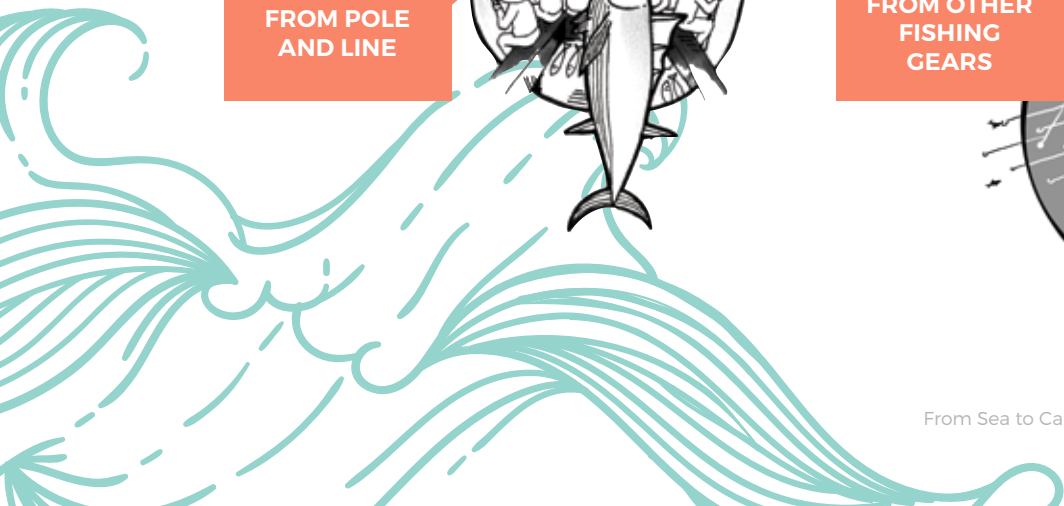
2 OUT OF 35 COMPANIES SOURCE FROM LONGLINE



12 OUT OF 35 COMPANIES SOURCE FROM POLE AND LINE



4 OUT OF 35 COMPANIES SOURCE FROM OTHER FISHING GEARS



RANK BY COUNTRY	NAME OF CANNERY	2018 GRADE	TRACEABILITY	SUSTAINABILITY OF CURRENT SOURCING	LEGALITY	EQUITY / SOCIAL	SOURCING POLICY	TRANSPARENCY AND CUSTOMER INFORMATION	DRIVING CHANGE
INDONESIA									
1	● PT. International Alliance Foods	76.67	●	●	●	●	●	●	●
2	● PT. Samudra Mandiri Sentosa	72.88	●	●	●	●	●	●	●
3	● PT. Sinar Pure Foods International	72.02	●	●	●	●	●	●	●
4	● PT. Citra Raja Ampat Canning	69.24	●	●	●	●	●	●	●
5	● PT. Aneka Tuna Indonesia	53.82	●	●	●	●	●	●	●
6	● PT. Deho Canning Company	53.05	●	●	●	●	●	●	●
7	● PT. Maya Muncar	41.71	●	●	●	●	●	●	●
N/A	● PT. RD Pacific International	-	●	●	●	●	●	●	●
N/A	● PT. Avila Prima Intra Makmur	-	●	●	●	●	●	●	●
N/A	● PT. Balimaya Permai Food Canning	-	●	●	●	●	●	●	●
N/A	● Industry	-	●	●	●	●	●	●	●
N/A	● PT. Banyuwangi Cannery Indonesia	-	●	●	●	●	●	●	●
N/A	● PT. Carvinna Trijaya Makmur	-	●	●	●	●	●	●	●
N/A	● PT. Delta Pasific Indotuna	-	●	●	●	●	●	●	●
N/A	● PT. Juifa International Foods	-	●	●	●	●	●	●	●
N/A	● CV. Pasific Harvest	-	●	●	●	●	●	●	●
N/A	● PT. Medan Tropical Canning	-	●	●	●	●	●	●	●
PHILIPPINES									
1	● Alliance Select Foods International	70.73	●	●	●	●	●	●	●
2	● General Tuna Corporation	69.74	●	●	●	●	●	●	●
3	● Philbest Canning Corporation	67.34	●	●	●	●	●	●	●
4	● RD Tuna Cannery LTD	64.90	●	●	●	●	●	●	●
5	● Seatrade Canning Corporation	58.88	●	●	●	●	●	●	●
6	● Ocean Canning Corporation	56.39	●	●	●	●	●	●	●
7	● Celebes Canning Corporation	53.79	●	●	●	●	●	●	●
THAILAND									
1	● TOPS manufactured by Thai Union	71.86	●	●	●	●	●	●	●
2	● NAUTILUS / SEA CROWN produced and distributed by Pataya Foods	58.83	●	●	●	●	●	●	●
3	● SEALECT / OCEAN WAVE manufactured by Thai Union, Distributed by T-Holding Co. & Loxley Trading Co., Ltd.	55.09	●	●	●	●	●	●	●
4	● SUPER C CHEF TUNA by SeaValue	54.89	●	●	●	●	●	●	●
5	● ROZA manufactured by Hi-Q Food Products	53.00	●	●	●	●	●	●	●
6	● ARO by Siam Makro Public Company Limited sourcing from Pataya	52.38	●	●	●	●	●	●	●
7	● TESCO produced for Tesco Lotus by Pataya Food Industries, Ltd.	50.37	●	●	●	●	●	●	●
8	● TCB manufactured by Tropical Canning	48.79	●	●	●	●	●	●	●
9	● AYAM BRAND manufactured by Thai Union	41.37	●	●	●	●	●	●	●
N/A	● KING'S KITCHEN manufactured by Premiere Marketing	-	●	●	●	●	●	●	●
N/A	● BIG C manufactured by Thai Union	-	●	●	●	●	●	●	●
N/A	● HOME FRESH MART manufactured by Thai Union for Home Fresh Mart, The Mall	-	●	●	●	●	●	●	●



**THE BRANDS WERE RANKED
ON A SCALE OF 1-100**



70-100 = GOOD



40-69 = FAIR



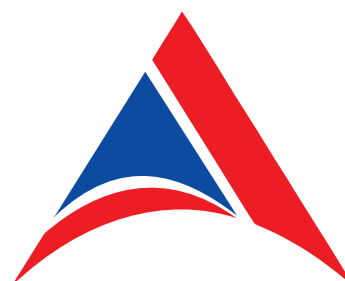
0-39 = POOR



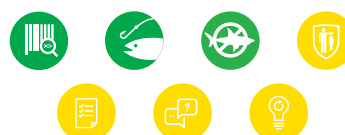
DID NOT PARTICIPATE

COMPANY PROFILES

INDONESIA



PT INTERNATIONAL ALLIANCE FOOD INDONESIA



76.67

International Alliance Food Indonesia is a subsidiary of Alliance Select Foods International in the Philippines. It ranked first among all Indonesian companies profiled in this report, and even earned a green rating due to its ecologically-aware sourcing and fishing methods. It sources 100% from pole and line caught tuna, nearly all of it Skipjack from the Western and Central Pacific Ocean. Aside from its tuna procurement policy, the company adheres to the Indonesian Pole and Line and Handline Fishing Association (AP2HI) Code of Conduct⁴⁴, which has provisions on traceability and IUU Fishing, among others. Its supply comes from Indonesian fishing boats, unlike its Philippine counterpart. The company is also involved in several Fisheries Improvement Projects. It could further bolster its score by rounding out its procurement policy to include language urging the protection of marine reserves and supporting proposed sites.



PT SAMUDRA MANDIRI SENTOSA



72.88

Samudra Mandiri Sentosa achieved a green status, with 74% of its supply coming from pole and line and the remainder being purse seine caught. It sources from Indonesian pole and line fishermen. Fortunately, it does not have Bigeye in its supply, and it sources only Skipjack and Yellowfin tuna from the Western Central Pacific Ocean. Pursuant to its sustainability policy, it had already surpassed its goal of employing over 60% pole and line by the end of 2018. It contracts with a third-party auditor for traceability and other areas, giving its buyers an extra layer of confidence in the product. The sustainability policy also includes provisions against IUU fishing. The company is working towards using alternative baits by culturing milkfish. It also adheres to the Indonesian Pole and Line and Handline Fishing Association (AP2HI) Code of Conduct.



PT SINAR PURE FOODS INTERNATIONAL



72.02

Sinar Pure Foods International landed in the green category, and is among Indonesian canneries that procure only from sustainable fishing methods, with 70% FAD-free tuna fishing and 30% pole and line, all coming from the Western Central Pacific Ocean. The company also adheres to the Indonesian Pole and Line and Handline Fishing Association (AP2HI) Code of Conduct. It has a fish procurement policy which has provisions against IUU fishing, catch of endangered species, and it works towards traceability from vessel to table. Sinar Pure Foods also encourages vessel owners to join the proactive vessel registry scheme which indicates commitment to traceability. The company could improve further if it were to include language in support of marine reserves in its policy and require that its sourcing be derived from vessels and canneries that all operate under the International Labor Organization core conventions.



PT CITRA RAJA AMPAT CANNING

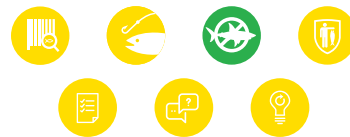


69.24

Citraraja Ampat Canning and Deho Canning are two companies under the same management. Citraraja sources Skipjack (80%) and Yellowfin (20%) from the Western Central Pacific Ocean, caught exclusively through pole and line. The company should work towards more transparency and develop its own traceability, sustainability and procurement policies and publicly inform the public through its own official company website. Recently, PT. Citraraja Ampat Canning has become the first fishery in Indonesia, and the second in Southeast Asia, to be certified to the internationally recognised Marine Stewardship Council (MSC) standard for sustainable fishing.⁴⁵



PT ANEKA TUNA INDONESIA



53.82

Aneka Tuna Indonesia procures tuna from a wide variety of fishing gears, including unsustainable purse seine (40%) and longline (12%), handline (12%), pole and line (31%), and the more sustainable method of trolling-around five percent. It also sources a greater variety of tuna species compared to other companies. This includes Skipjack (52%), Yellowfin (31%), Albacore (15%), and just two percent of Tonggol. It also adheres to the Indonesian Pole and Line and Handline Fishing Association (AP2HI) Code of Conduct. The company's "Tuna Sustainability Policy" has a provision against IUU fishing, the promotion of less aggressive fishing methods, traceability from sea to plate, and transparency. It could improve in its traceability score by employing a third-party auditor of its supply chain. Aneka Tuna sources from both the Western Central Pacific Ocean and the Indian Ocean. It must publish a public-facing seafood sustainability policy and strengthen it by including provisions in support of marine reserves and set goals of transitioning its purse seine-caught tuna towards vessels that use more sustainable methods. For ecological reasons, it should stop sourcing Yellowfin tuna caught in the Indian Ocean.



DEHO CANNING COMPANY



53.05

Deho Canning and Citraraja Ampat Canning are two companies under the same management. Like Citraraja, Deho Canning sources Skipjack (80%) and Yellowfin (20%) in the Western Central Pacific Ocean. However, the fishing methods vary. Its suppliers use purse seine (63%), pole and line (21%) and handline (16%). The company's "Dolphin-Safe Company Policy" has the standard provisions against use drift or gill nets, non-deployments of purse seines on marine mammals, conditions on transshipment, and ban of IUU fishing. Deho Canning has yet to develop its own official website. It should work towards far more transparency, and develop more robust traceability, sustainability, and procurement policies.



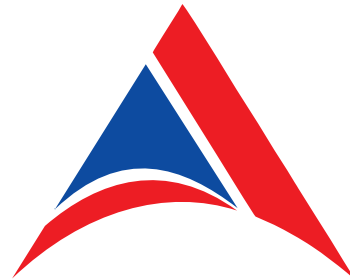
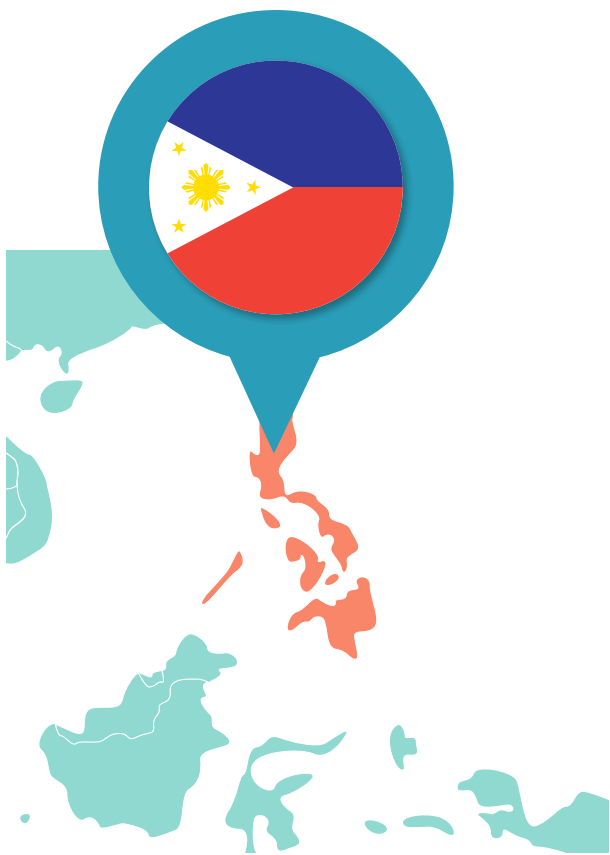
PT MAYA MUNCAR



41.71

Maya Muncar, manufacturer of the canned tuna brand Maya, barely achieved a passing score and narrowly avoided the fail category. It sources Skipjack (35%), Yellowfin (15%), Albacore (30%), and Tonggol (20%) in its tuna products, some of it from the Western Central Pacific Ocean and the vast majority from more imperiled stocks in the Indian Ocean. Its suppliers use several fishing gears, and its total tuna supply is derived from 33% use of sustainable gear types (like trolling, handline, and pole and line), while the remaining 67% comes from purse seine and longline. The company has yet to develop a procurement policy which favors sourcing from vessels with more sustainable methods of fishing, and did not provide Greenpeace with a copy of its private policy. It should also give buyers' confidence in its product by employing a third-party auditor to assess its traceability system.

PHILIPPINES



ALLIANCE SELECT FOODS INTERNATIONAL



70.73

Alliance Select - the leading evaluated company for the Philippines - barely made the cut as a green-ranked company. It has a strong traceability system in place that is reviewed by a third-party auditor. The company is sourcing Skipjack (65%) and Yellowfin (30%), mostly using FAD-free fishing. The company has a tuna procurement policy that indicates the species and fishing gears used, contains a provision against IUU fishing and transshipment at sea, and provisions which provide for “safe and fair working conditions,” “equitable” fishing agreements, ethical fishing methods, and strict human rights standards.



GENERAL TUNA CORPORATION



69.74

General Tuna Corporation, makers of the *Century Tuna* brand, landed just shy of the green zone. It has a strong traceability policy and system in place, audited by a third-party (MRAG Americas), and also has an MSC Certificate Single Site Chain of Custody for MSC products. The company is in support of marine reserves on the high seas and its publicly posted sourcing policy indicates a complete ban on longline and driftnet fishing methods. Almost 99% of its tuna are caught by purse seiners. General Tuna Corporation was the first to commercialize handline Yellowfin tuna product in 2015, in collaboration with WWF. However, it has not increased its production volume as it has remained at one percent ever since.



PHILBEST CANNING



67.34

Philbest is RD Corporation's canned tuna brand in the Philippines. Philbest sources Skipjack (80%), Yellowfin (19%) and just one percent of Bigeye. Its sustainability policy can be found on their website. A detailed procurement policy was provided to Greenpeace, but is not available to the public. The company has an MSC Chain of Custody certification. Around 75% of its supply is FAD-free, while 10% is pole and line and the remaining 15% is supplied by purse seiners. In its letter to Greenpeace, Philbest indicated that it is already sourcing MSC fish and has started shipping MSC labelled cans in September 2018⁴⁶. Philbest is a participant of the Business Social Compliance Initiative (BSCI)⁴⁷.

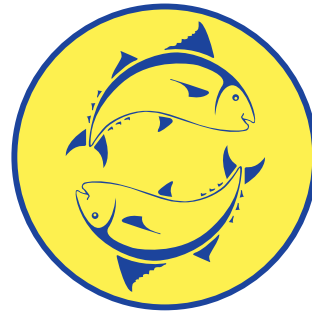


RD TUNA CANNERS LTD.

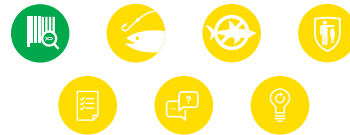


64.90

RD Tuna Canners, based in Papua New Guinea, is owned by the RD Group of Companies located in General Santos City, Philippines. RD Tuna Canners has an MSC Chain of Custody certification, and a Fish Sustainability Manual which “delineates the guiding principle in handling non-free school (NFS), free school (FS) [FAD-free], and MSC certified raw fish material from the time of purchasing of raw fish material to delivery of the finished products.” Compared to its sister company Philbest, RD Tuna Canners actually sources more sustainably: it purchases Skipjack (62%) and Yellowfin (37%). RD Tuna Canners sources 82% FAD-free caught tuna, which is a slightly higher volume than Philbest. Both RD Tuna Canners and Philbest are part of the Business Social Compliance Initiative. The company has yet to come up with a fully-operational website, and therefore, unlike Philbest, is missing a publicly-facing sustainable tuna policy.



SEATRADE CANNING

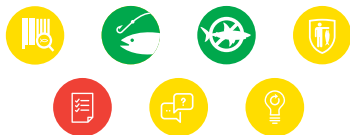


58.88

At first glance, Seatrade has an impressive seafood procurement policy. However, while some provisions of this policy promote progressive conservation measures, the policy falls short of explicitly supporting the use of sustainable fishing methods. Seatrade sources Skipjack (90%) and Yellowfin (10%) from the Western Central Pacific Ocean. While it does rely on FAD-free purse seine fishing for some of its catch, most of its supply comes from regular purse seine vessels. There is also nothing in its policy that addresses human trafficking in the industry. While the company has an official website, it could be further improved by publishing its sustainable tuna policy online for the public to see.

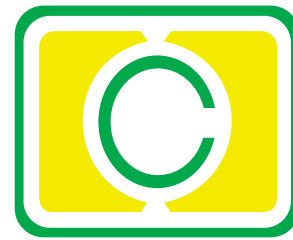


OCEAN CANNING

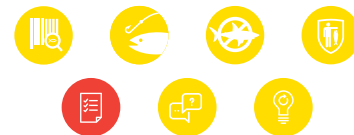


56.39

Ocean Canning needs to invest in a more robust traceability program and should consider hiring a third-party auditor. The company is being supplied by Philippine flagged fishing vessels. While it did provide evidence of government inspection from the Bureau of Fisheries and Aquatic Resources, the company has a skeletal procurement policy that is light on details and unclear on level of implementation. Ocean Canning claims to supply 50% FAD-caught and 50% FAD-free tuna, with Skipjack (90%) and Yellowfin (10%) coming from the Western Central Pacific Ocean. It submitted enough documentation to substantiate some of its sustainability claims, but not all. The company has yet to create its official website, and therefore its procurement policy remains hidden to the public.



CELEBES CANNING



53.79

In its supporting documentation, Celebes Canning provided Greenpeace with a German client's label, to establish the country of origin, FAO code, and QR code. While it claims to have no FAD-free product in the survey, the company suggested that it does source small quantities according to supplemental documents provided. Celebes sources Skipjack (78%) and Yellowfin (21%). The company has yet to create an official website, making its tuna procurement policy unavailable to the public. Celebes Canning should enable buyers' confidence in its product by hiring a third-party auditor to verify the integrity of its supply chain. Celebes is mostly supplied by Philippine fishing companies for its canned tuna and by one foreign company that supplies frozen tuna.

THAILAND



TOPS SUPERMARKET

manufactured by Thai Union
Manufacturing (T-Holding Co.)



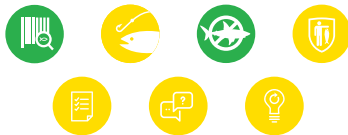
71.86

Tops Supermarket maintained its leading status among all Thai companies profiled, and narrowly managed to capture a green rating. It relies on a third-party auditor to ensure the integrity of its supply chain. Its procurement policy specifies Skipjack (100%) caught mostly by FAD-free tuna fishing. Skipjack and Yellowfin are caught from the Western Central Pacific Ocean where stocks are not yet overfished. Tops also has the highest grade in the Transparency and Customer Information category. Some Tops Supermarkets even have a designated booth with employees engaging customers about this more sustainably caught product. Greenpeace was unable to find any other Thailand-based retailer demonstrating this level of commitment with in-store sustainability information for customers. However, Tops must improve its sourcing policy, as it is silent on issues pertaining to marine reserves, catch retention policies, and more equitable sourcing.



NAUTILUS & SEA CROWN

brands of Pataya Food Industries



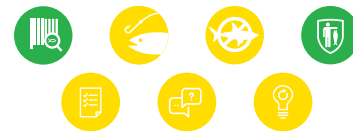
58.83

Nautilus and Sea Crown source 100% Skipjack tuna from the Western Central Pacific Ocean, mostly using conventional FAD-caught purse seines (74%), followed by FAD-free purse seines (21%) and pole and line (5%). Pataya Food Industries has a thorough traceability policy complete with a third-party auditor – MRAG – as well as an MSC Chain of Custody audit. Pataya’s “Statement of Sustainability”⁴⁸ has provisions on procurement and expresses its support of research initiatives that reduce bycatch associated with FADs. Pataya’s policy should be more explicit in its promotion of equitable sourcing practices and its support of existing and proposed marine reserves. The company must also swiftly transition the catch method for roughly three-quarters of its volume to more sustainable fishing methods. FAD-caught purse seine fishing is an indiscriminate method that results in bycatch and juvenile tuna being commonly landed.



SEALECT & OCEAN WAVE

brands of Thai Union Foods (T-Holding Co.)



55.09

In 2017, Thai Union’s global sales distribution was dominated by the US at 38% and Europe at 32%, while in Thailand it was at 10%.⁴⁹ In the same year, Sealect controlled 47% of the market share value of the canned tuna market in Thailand.⁵⁰

After months of intense pressure, with supporters and seafood consumers demanding more responsible business practices from the world’s largest tuna processor, in July 2017, Thai Union committed to an agreement to make far-reaching changes to their supply chains by reducing illegal and unethical practices on global supply chains and by bringing more responsibly caught tuna to key markets. Commitments also include enhanced labor rights on vessels supplying to Thai Union.⁵¹

Sealect currently uses 100% Skipjack caught by purse seine. However, Thai Union’s commitments to Greenpeace and its SeaChange sustainability strategy aims to significantly improve the environmental performance of purse seine and FAD fisheries, by reducing the numbers of FADs in use in the Pacific and Indian Oceans, improving the regulation and control of FADs by working more closely with RFMOs, and reducing bycatch. More about Thai Union’s commitments on these issues can be found in its public commitments to Greenpeace.



SUPER C CHEF

brand of Sea Value



54.89

Super C Chef, by Sea Value, has a “Sustainable Seafood Procurement and Processing Policy”⁵² posted on its website. For purposes of the Super C Chef brand, Sea Value has informed Greenpeace that it sources from the Indian Ocean, which differs from the tuna it sources for its other brands, according to the Sea Value website.

For the Super C Chef brand, the company sources 100% pole and line-caught Yellowfin tuna caught from the Indian Ocean, the location of which is very unfortunate as these stocks remain overfished and are subject to overfishing. The commendable fishing method of pole and line may protect the rest of the ecosystem and significantly reduce bycatch, but does not alleviate any fishing pressure on the target Yellowfin tuna.

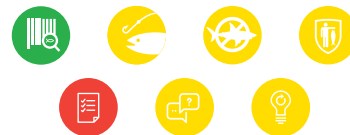
Sea Value has pledged to refrain from transactions in tuna caught by either fishing vessels or transported by transshipment vessels on the IUU Vessel List of any RFMO. Sea Value maintains a credible scheme that traces tuna from capture to store shelf, including fish species, fishing gear employed, and each species by weight. Its supply chain is reviewed annually by a third-party auditor.

Super C Chef is the first brand to launch an MSC product on the Thai market.⁵³



ROZA

brand of Hi-Q Food Products Co.



53.00

Roza purchases 100% Tonggol tuna caught exclusively by purse seines fishing in the Western Central Pacific Ocean. While the company could demonstrate evidence of a traceability audit by a third-party (in the context of a mock product recall), it could do more to ensure that illegally caught tuna does not enter its supply chain. Hi-Q has yet to develop a canned tuna procurement policy, though it has communicated to Greenpeace that it plans to publicly release a policy within a year. The company should swiftly shift to more sustainable methods of fishing such as FAD-free, handline, or pole and line. It should also develop a robust and responsible sourcing policy, and should consider sourcing Skipjack instead of Tonggol, considering that the stock status of the latter has yet to be determined.



ARO

brand of Siam Makro
(acquired by CP ALL)



52.38

Aro is manufactured by Pataya Food Industries for the Siam Makro supermarket chain, which has a sustainable sourcing policy. The policy has a stringent section on traceability, requiring that their suppliers provide sourcing evidence and certificates of origin, and that they fully cooperate with any third-party auditors. It also has a section on forced labor where “business partners shall not engage in any forms of forced and compulsory labor ...” Makro sources 100% Skipjack from the Western Central Pacific Ocean, 80% of which is caught by purse seine fishing vessels, while 20% is sourced FAD-free purse seining. Makro’s sustainable sourcing guideline states a preference for FAD-free caught tuna. Given that only two years ago Aro tuna did not contain any FAD-free product, this demonstrates that the company is moving into the right direction on its preferential sourcing guideline. Nonetheless, time is of the essence for our oceans, and Greenpeace recommends that the company increase its FAD-free purse seine supply at a quicker pace.



TESCO

Tesco-Lotus or Ek-Chai Distribution
System Co.



50.37

The Tesco-Lotus store-brand tuna is manufactured by Chotiawat Manufacturing Co. (CMC), which relies on the third-party auditor MRAG for traceability. Unfortunately, Thai consumers at a Tesco-Lotus supermarket are not provided with the same sustainable tuna options as their Tesco-shopping British counterparts at parent company Tesco UK.

Tesco-Lotus sources 100% Skipjack, with the vast majority of it from the Western Central Pacific Ocean - but only a paltry three percent of it is FAD-free purse seining, with the remaining 97% caught by regular purse seine vessels. As far as information for consumers, the company has much to improve - both online and at the point of sale. CMC conforms to a generic and pro forma ISSF-provided “Seafood Sustainability Procurement Policy,” leaving questions as to whether the provisions are fully implemented. While CMC has a “Human Rights Policy and Social Accountability” document, it is unclear whether this policy also applies to its suppliers, which includes some foreign fishing fleets.



TCB
brand Tropical Canning



48.79

TCB, manufactured by Tropical Canning, did not participate in the survey process this year. Nonetheless, given its higher degree of transparency online as compared to its peers, Greenpeace was able to find enough publicly-available documentation to (barely) earn the company a spot in the “fair” category. TCB has tight policies on traceability policy in place, and has a strong worker-protection policy. These are the foundations upon which positive reforms can develop in the near future. The company still has pending work to do regarding sustainability. It sources Tonggol from the Western Central Pacific Ocean, using purse seine nets and FADs. If it can directly address this issue and be a driver of reform in the industry, it has the potential to jump up the charts given that it has a respectable documentation of its policies and practices online.



AYAM BRAND



41.37

Ayam Brand, same as the company name is manufactured by Thai Union. While the company did not fully participate in the survey process, Greenpeace was able to gather meaningful information from its website. The company sources skipjack and yellowfin tuna from the Western Central Pacific Ocean. Information about the status of skipjack and yellowfin stocks can be seen in their website. Its “Sustainability Policy” mentioned in the 2016 cannery ranking report is now posted in their website.

RECOMMENDATIONS FOR TUNA COMPANIES

Develop robust policies on Traceability

- Invest in third-party audits to ensure full supply chain traceability.
- Maintain traceability documents that include name of vessel, species caught, fishing gear and captain's statement.
- Require suppliers to disclose fishing vessel list.
- Establish an alphanumeric system which traces each can or batch to: species, precise stock area, port and country of landing including any transshipment details, specific fishing method, fishing vessel, catch date, and individual cannery.

Develop explicit policies on Sustainability

- Procure from vessels that employ lower-impact fishing methods, including pole and line, handline, troll and FAD-free purse seining.
- Establish clear procurement protocols so as to avoid sourcing from fisheries:
 - Identified by any Regional Fisheries Management Organization or competent body as targeting stocks either overfished or where overfishing is occurring.
 - Where non-target species are threatened;
 - Where by-catch levels are high;
 - Where management standards are low, such as in cases where high levels of IUU fishing have been identified;
 - Where there are no measures in place to minimize by-catch; and
 - Where control measures are weak
- If a company sources from longlines, prohibit sourcing from vessels without full bycatch mitigation or from vessels without 100% independent human or electronic observer coverage.
- Do not source from vessels or companies identified as involved in shark finning practices.

Fully inform consumers about tuna products on website and at the point of sale

- Official company websites should include the company's tuna sourcing policy, traceability policy, and its sustainability commitments to allow consumers to make an informed choice.
- Set higher standards for labelling. Enhance consumer transparency by including species of tuna used on the label or website (e.g. Skipjack or Yellowfin), fishing gear (e.g. FAD-free, pole and line, handline, troll, purse seine or longline) and fishing area (e.g. Indian Ocean or Western Central Pacific Ocean). Some companies place "handline caught Yellowfin" or "pole and line caught Skipjack" either on the label or on the lid.
- Other customer information can be accessed through a QR Code, website can tracker, lot number, or via mobile applications.
- Retailers, such as supermarkets, are encouraged to develop in-store signage or displays that highlight sustainable tuna options for customers.

Implement a zero tolerance for IUU Fishing

- Regularly check fishing vessel suppliers against [Combined IUU Vessel List](#).
- Enact a strong policy regarding at-sea transshipment, either refusing to source fish which has been transshipped at sea, or allowing it only under the most strict measures, including full transparency and disclosure upon request of quantities and species transshipped, vessels involved, and 100% human observer coverage on board of the fishing and receiving vessel.

Develop policy against slavery at sea

- Processors should require a fishing crew manifest for each fishing vessel.
- Contribute to the universal endorsement of the [ILO Work in Fishing Convention No. 188](#) by supporting advocacy efforts for its ratification and full implementation, as well as consider not sourcing from vessels flagged to States which have not ratified such Convention.
- Establish measures for early detection and prevention of slavery at sea.
- Develop a Slavery at Sea hotline or an application platform where informants can anonymously report abuse.

Participate in progressive fisheries conservation programs

- Be vocal on important issues concerning oceans protection, fishing conservation, slavery at sea, and sustainable fishing.
- Support proposed marine reserves, no fishing in high seas pockets.
- Work with like-minded environmental NGOs in implementing Fisheries Improvement Programs (FIPs) designed with high standards, clear objectives and time-bound measures to achieve those.
- Support efforts to promote lower-impact fishing practices such as handline, pole and line, FAD-free fishing and troll fishing.
- Lead the change towards a sustainable, traceable, and worker-friendly seafood supply chain.





GLOSSARY

Bycatch or non-targeted sea life - Most fishing gears are not selective. This means that as well as the 'target' species of fish it catches, any number of 'non-target' species may also be hauled in. This 'incidental' catch of other species is referred to as 'bycatch'. Globally, it is estimated that a quarter of what is caught is wasted - thrown back into the sea, because it has no commercial value, and ending up as dead. Fishing quotas mean that fishermen targeting a particular species or size of fish will throw back any 'non-target' or 'too small' fish that they catch.⁵⁴

Fish Aggregating Device - Fish aggregating devices (FADs), called *payao* in the Philippines and *rumpon* in Indonesia, are large floating objects deployed by fishing vessels to attract fish and make easier the task of finding and catching them. FADs work because tuna and a whole range of other fish and marine animals instinctively gather around such floating objects (as they do around floating logs and even megafauna such as whales and whale sharks), for shelter and protection, and to feed on smaller animals already congregating there.

Free school purse seine - Refers to the use of purse seine without FADs. Also known as "FAD-free." This is preferable to conventional FAD-caught purse seine. Instead of setting a lure (a FAD) and catching everything there, here the vessel pursues a free-swimming school of skipjack, and sets the purse seine net on them. There is a significantly lower bycatch rate with FAD-free purse seine tuna fishing and fewer juvenile tunas (up to 90% less).⁵⁵

Handline fishing - a selective and generally responsible fishing method in which a line with a hook, usually baited, is lowered into the water from a drifting, anchored or moving boat. Handlining is holding a line in the hand while waiting either actively or passively for a fish to take the bait. If there is a bite and a fish takes the hook, it can then be hauled in by hand.

IUU fishing - Illegal, unreported and unregulated fishing. Often used interchangeably with a similar term "pirate fishing."

IUCN Red List - The world's most comprehensive inventory of the global conservation status of plant and animal species. It is widely considered to be the most objective and authoritative system for classifying species in terms of the risk of extinction. Classification groups are: Data Deficient, Least Concern, Near Threatened, Vulnerable, Endangered, Critically Endangered, Extinct in the Wild, or Extinct.



Longliners - A type of fishing gear consisting of short lines carrying hooks, attached at regular intervals to a longer main line which is laid on the bottom or suspended horizontally with the help of surface floats. Main lines are up to 150 km long and can carry several thousand hooks. Commonly used for tuna.



Marine Reserves - Highly protected areas that are off-limits to all extractive and destructive uses, including fishing, and – simply put – are the marine equivalent of national parks on land. Wherever marine reserves have been implemented around the world they have been found to confer a range of conservation benefits and, in

many places, benefits to fisheries as well. The establishment of marine reserves has been shown to result in long-lasting and often rapid increases in the abundance, diversity and productivity of marine organisms.⁵⁶

Pole and line - A fishing method in which surface schooling fish are attracted to a vessel and driven into active feeding behaviour by throwing live or dead bait into the water and spraying water onto the sea surface to simulate the escape of small prey. Poles and lines with barbless hooks are used to hook the fish which are pulled on board by manual or powered devices. Also known as bait-boat fishing, this method is used worldwide to capture surface-schooling tuna such as skipjack and albacore.

Purse seiner - A method of fishing in which fish are encircled with a large 'wall' of net, which is then brought together to retain the fish by using a line at the bottom that enables the net to be closed like a purse. Commonly used to catch schooling fish such as tuna, mackerel, and herring.

Transshipment - Fishing vessels at sea transferring fish from one to another, often without any sort of observer coverage. This practice compounds the problem of the seafood chain of custody and makes tracing a product to its source extremely difficult. Progressive companies are abandoning transshipment in favor of more defensible and transparent protocols that allow them to stand behind their product.

Troll - A trolling line consists of a line with natural or artificial baited hooks and is trailed by a fishing vessel. Several lines are often towed at the same time, by using outriggers to keep the lines away from the wake of the vessel.

ENDNOTES

- 1 Galland et al. 2016. Netting billions: a global valuation of tuna. A report from the Pew Charitable Trusts. <https://www.pewtrusts.org/en/research-and-analysis/reports/2016/05/netting-billions-a-global-valuation-of-tuna>
- 2 Ibid Footnote #1
- 3 IUCN. 2018. The IUCN red list of threatened species. See <http://www.iucnredlist.org/>
- 4 Albacore Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/21856/9325450>
- 5 Yellowfin Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/21857/9327139>
- 6 Bigeye Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/21859/9329255>
- 7 Pacific Bluefin Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/170341/65166749>
- 8 Atlantic Bluefin Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/21860/9331546>
- 9 Southern Bluefin Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/21858/9328286>
- 10 Skipjack Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/170310/6739812>
- 11 Longtail Tuna. See Colette et al. 2011 <https://www.iucnredlist.org/species/170351/6763691>
- 12 Ocean Action Hub. 2018. 118 Organizations make sustainability appeal for global tuna fisheries. <https://www.oceanactionhub.org/production.oceanactionhub.org/index.php?q=118-organizations-make-sustainability-appeal-global-tuna-fisheries>
- 13 Garcia, SM. (nd) The precautionary approach to fisheries and its implications for fishery research, technology and management: an updated review. <http://www.fao.org/docrep/003/W1238E/W1238E01.htm>
- 14 Williams, P. et al. 2017. Overview of Tuna Fisheries in the Western and Central Pacific Ocean, including Economic Conditions - 2016 <https://www.wcpfc.int/node/29628>
- 15 Ibid Footnote #11
- 16 Reference document for review of CMM 2016-01 (bigeye, yellowfin, and skipjack tuna) <https://www.wcpfc.int/node/30117>
- 17 Reference document for review of CMM 2015-02 (South Pacific albacore tuna) <https://www.wcpfc.int/node/30118>
- 18 Ibid Footnote #3
- 19 Ibid Footnote #3
- 20 Ibid Footnote #3
- 21 Ibid Footnote #4
- 22 The western and central Pacific tuna fishery: 2016 Overview and status of stocks <https://www.wcpfc.int/node/30158>
- 23 IOTC. 2017. Report of the 19th Session of the IOTC working party on tropical tunas. <http://iotc.org/documents/report-19th-session-iotc-working-party-tropical-tunas>
- 24 ibid. pp. 8
- 25 ibid. pp. 9
- 26 ibid. pp. 8
- 27 Trade Map. 2018. Trade statistics for international business development. <https://www.trademap.org/>
- 28 Trade Map. 2018. Trade statistics for international business development. <https://www.trademap.org/>
- 29 United Nations Food and Agriculture Organization. FAO Technical Guidelines for Responsible Fisheries, No. 1 FAO, Rome (1996) <http://www.fao.org/tempref/docrep/fao/003/W3591e/W3591e00.pdf>
- 30 C029 - Forced Labour Convention, 1930 (No. 29) http://www.ilo.org/dyn/normlex/en/f?p=NORMLEXPUB:12100:0::NO::P12100_ILO_CODE:C029
- 31 Ewell, E. et al. 2017. Potential ecological and social benefits of a moratorium on transshipment on the high seas. In Marine Policy. Vol. 81. July 2017. pp. 293-300. <https://www.sciencedirect.com/science/article/pii/S0308597X17300623>
- 32 Simmons, G and C. Stringer. 2014. New Zealand's fisheries management system: Forced labour an ignored or overlooked dimension? In Marine Policy Vol.50 Part A. December 2014. pp. 74-80. <https://www.sciencedirect.com/science/article/pii/S0308597X14001432>

- 33 ILO Caught at Sea: forced Labour and Trafficking in Fisheries International Labor Organization, Geneva (2013)
https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_214472.pdf
- 34 Greenpeace.2018. Taiwanese seafood giant linked to human rights violations
<https://www.greenpeace.org/international/press-release/16676/taiwanese-seafood-giant-linked-to-human-rights-violations-greenpeace/>
- 35 U.S. Department of Labor, List of Goods Produced by Child Labor or Forced Labor (U.S. Department of Labor, Bureau of International Labor Affairs, 2016)
https://www.dol.gov/sites/default/files/documents/ilab/reports/child-labor/findings/TVPR_Report2016.pdf
- 36 A. Hamilton, A. Lewis, M. McCoy, E. Havice, L. Campling, Market and Industry Dynamics in the Global Tuna Supply Chain (Forum Fisheries Agency, 2011), 153 pp;
www.ffa.int/system/files/Global%20Tuna%20Market%20%26%20Industry%20Dynamics_Part%201a.pdf
- 37 U.S. Department of State, Philippines Country Profile in Trafficking in Persons Report 2015 (U.S. Department of State, 2015); <https://www.state.gov/j/tip/rls/tiprpt/countries/2015/243514.htm>
- 38 C. Stringer, D. H. Whittaker, G. Simmons. New Zealand's turbulent waters: The use of forced labour in the fishing industry. *Glob. Netw.* 16, 3–24 (2016). <https://onlinelibrary.wiley.com/doi/full/10.1111/glob.12077>
- 39 U.S. Department of State, Solomon Islands Country Profile in Trafficking in Persons Report 2014 (U.S. Department of State, 2014); <https://www.state.gov/j/tip/rls/tiprpt/countries/2014/226814.htm>
- 40 Greenpeace. 2015. From sea to can: Thailand canned tuna ranking
https://www.greenpeace.org/seasia/th/PageFiles/705030/Thailand-Canned-Tuna-Ranking_EN.pdf
- 41 Greenpeace. 2015. Tuna cannery ranking. Indonesia and Philippines
http://www.greenpeace.org/seasia/ph/PageFiles/710346/Tuna_Cannery_Ranking.pdf
- 42 Greenpeace. 2016. From sea to can. 2016 Southeast Asia Canned Tuna Ranking.
<http://www.greenpeace.org/seasia/Press-Centre/publications/From-Sea-to-Can-2016-Southeast-Asia-Canned-Tuna-Ranking/>
- 43 Fifteen companies from Indonesia, the Philippines, and Thailand supported this submission that recommended actions on fish aggregating devices, human rights abuses, longline, and transshipment. Southeast Asia cannery intervention to WCPFC. 2017. <https://www.wcpfc.int/node/30185>
- 44 Indonesian Pole & Line and Handline Fisheries Association. AP2HI 2018 Code of Conduct.
http://www.ap2hi.org/?page_id=3620
- 45 <https://www.msc.org/media-centre/press-releases/first-indonesian-tuna-fishery-achieves-msc-certification>
- 46 Pers. Comm. Philbest to Greenpeace. 15 October 2018
- 47 BSCI is a leading supply chain management system that supports companies to drive social compliance and improvements within the factories and farms in their global supply chains
<https://www.amfori.org/content/what-we-do-0>
- 48 Pataya Food Industries Ltd. Statement of Sustainability.
<http://www.patayafood.com/pdf/The%20Statement%20of%20Sustainability.pdf>
- 49 Thai Union Annual Report 2017.
<http://tu.listedcompany.com/misc/ar/20180329-tu-ar2017-en.pdf> see page 62
- 50 Thai Union Annual Report 2017.
<http://tu.listedcompany.com/misc/ar/20180329-tu-ar2017-en.pdf> see page 84
- 51 Thai Union. Tuna Commitment 2017 Progress Report.
<http://www.thaiunion.com/files/download/sustainability/20180518-tu-tuna-commitment-report-2017.pdf>
- 52 http://www.seavaluegroup.com/Sustainable_seafood_procurement_and_processing.html
- 53 <https://www.undercurrentnews.com/2016/05/30/sea-value-eyes-pna-yellowfin-to-continue-first-ever-msc-canned-tuna-range-for-thai-market/>
- 54 Greenpeace. Bycatch – wasteful and destructive fishing.
<https://www.greenpeace.org.uk/what-we-do/oceans/overfishing/bycatch/>
- 55 Lawson T (2012). Estimation of the species composition of the catch by purse seiners in the Western and Central Pacific Ocean using grab samples and spill samples collected by observers. Scientific Committee Eighth Regular Session, 7-15 August 2012, Busan, Republic of Korea. WCPFC–SC8–2012 / ST–WP–03 (Rev. 1). Accessed Sept 2012 at: <<https://www.wcpfc.int/node/3189>>
- 56 Greenpeace. 2010. Emergency Oceans Rescue Plan: Implementing the Marine Reserves Roadmap to Recovery.
<https://www.greenpeace.org/archive-international/PageFiles/163940/Emergency%20Oceans%20Rescue%20Plan%20FINAL%20LR.pdf>

Thailand Office

1371 Capital Building, G Floor,
Phaholyothin Road
Samsennai, Phayathai
Bangkok 10400 Thailand
Tel: +66-2-357 1921
Fax: +66-2-357 1929
info.th@greenpeace.org

Indonesia Office

Mega Plaza Building 5th floor
Jl. HR Rasuna Said Kav.C3
Jakarta 12920
Tel: +62-21-521-2552
Fax: +62-21-521-2553
info.id@greenpeace.org

Philippines Office

Room 201 JGS Building, #30
Scout Tuason Street,
1103 Quezon City
Tel: +63-2-332-1807
Fax: +63-2-332-1806
info.ph@greenpeace.org

Malaysia Office

No.10-1, Level 1
Jalan Tun Sambanthan 3
Brickfields 50470,
Kuala Lumpur
Tel: +603-22762022
Fax: +603-22762025
info.my@greenpeace.org

www.greenpeace.org/seasia