



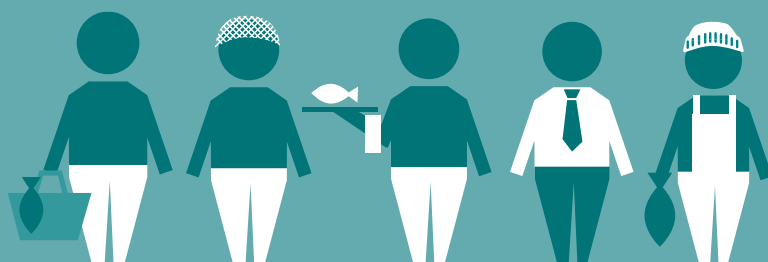
WWF

REPORT

2017



CHARTING THE COURSE



**WWF-SASSI RETAILER/ SUPPLIER
PARTICIPATION SCHEME REPORT 2017**



ABOUT THIS REPORT

This fourth edition of the WWF-SASSI Retailer/ Supplier Participation Scheme report focuses on progress made by South Africa's top seafood vendors that have been working towards a sustainable seafood supply chain and reflects on the longer term goals of the scheme.

The 2017 report showcases progress of the scheme's participants towards the public commitments to sustainable seafood that they have made. This process in turn creates a strong market incentive for fisheries to improve their practices so that seafood vendors can ensure that they are supporting responsibly-managed fisheries.

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wwf.org.za

The World Wide Fund for Nature (WWF) is one of the world's largest and most respected independent conservation organisations, with almost six million supporters and a global network active in over 100 countries.

WWF's mission is to stop the degradation of the Earth's natural environment and to build a future in which humans live in harmony with nature by conserving the world's biological diversity, ensuring that the use of renewable natural resources is sustainable and promoting the reduction of pollution and wasteful consumption.

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CONTENTS

INTRODUCTION	2
CHARTING THE COURSE	3
TRACKING PARTICIPANT PROGRESS	4
I&J	5
John Dory's	6
Pick n Pay	7
Food Lover's Market	8
Woolworths	9
SPAR Group Limited	10
Ocean Basket	11
Sun International	12
Breco Seafoods	13
CONSUMER PERSPECTIVES	14
CONCLUSION	16

INTRODUCTION

To ensure responsible harvesting of fish and to build sustainable seafood supply chains, WWF South Africa engages with partners across key seafood sectors.

For many years WWF has been involved in empowering seafood-loving consumers, engaging seafood markets, and positively influencing source fisheries and farms. To effect change in seafood markets WWF established a voluntary business platform called the WWF-SASSI Retailer/ Supplier Participation Scheme. This scheme engages South Africa's top seafood vendors – key suppliers, national retailers, restaurant chains and hotels – to facilitate the adoption of sustainable seafood practices within their businesses.

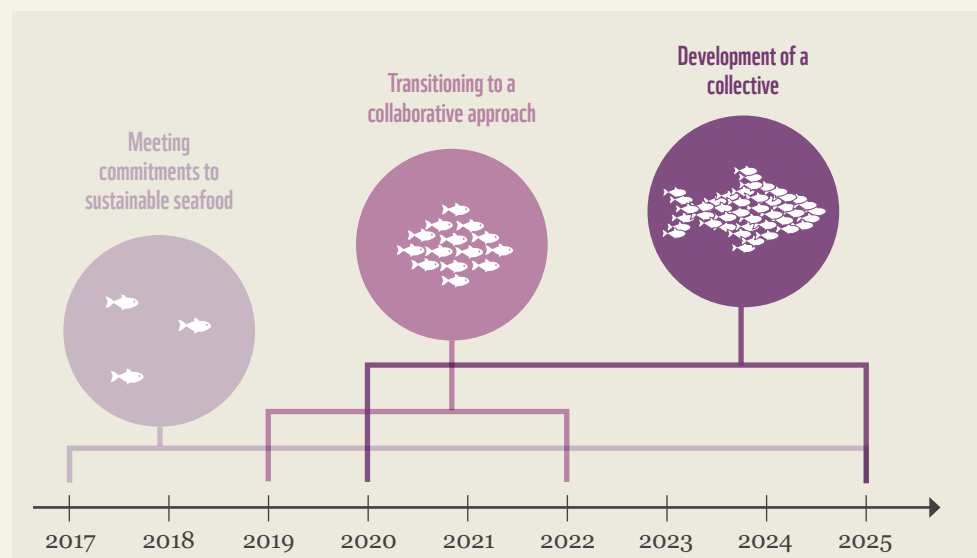
WWF has seen consistent progress towards the targets contained in the commitments to sustainable seafood.

WWF has seen consistent progress towards the targets contained in the sustainable seafood commitments made by the individual companies participating in the scheme. The scheme itself has also grown in relevance. As of 2017, five of South Africa's big six national retailers have joined and are actively participating.

The first South African retailer made public commitments to sustainable seafood in 2011. Five years later, the first round of target dates for these commitments came to pass. Since then, WWF has been working on the next steps the market should take to achieve the shared vision of a sustainable seafood industry. This will require the scheme to transition towards a longer term vision that will entrench sustainability in the seafood market. A key component of this three-phase transition is increased collaboration. This will enable the seafood market to address sustainability challenges that are unlikely to be met at an individual company level.

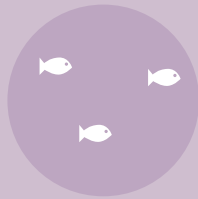
In terms of the transition, scheme participants need to firstly ensure that all commitments to seafood sustainability are comprehensively met by the target dates they have set themselves. Secondly, between 2019 and 2022, WWF will facilitate collaborative efforts to address key seafood sustainability challenges facing the sector. Thirdly, sustainability to be entrenched in the seafood market through the establishment of a formalised collective structure. This structure should provide a platform for seafood vendors to use a collective approach to drive positive change in the way we manage our marine resources.

Timeline of the transition from working with individual companies towards facilitating the establishment of a collective.



CHARTING THE COURSE

Meeting commitments to sustainable seafood



2017 to 2025

WWF continues to assist and work closely with scheme participants to achieve their commitments to sustainable seafood, both in terms of the targets that they have set and embedding their seafood procurement strategies.

Three key focus areas that each participant will need to address:

- Meeting all targets contained in commitments to sustainable seafood;
- Implementing procurement policies aimed at maintaining performance; and
- Conducting ongoing staff training to ensure best practice.

By 2020 this area of work should have run its course and scheme participants should have embedded systems to support the ongoing sustainability of their seafood operations.

Transitioning to a collaborative approach



2019 to 2022

Healthy oceans cannot be achieved by working at an individual company level and there is thus a need to facilitate increased collaboration within the seafood market.

Scheme participants will be encouraged to find collaborative solutions to challenges that persist when attempting to address them at an individual company level, while continuing to communicate the work being done in the sector.

This will lay the foundation for developing shared goals along the following focus areas:

- Seafood product traceability to point of origin;
- Seafood supply chain transparency and seafood product labelling;
- Improved business-to-business communications between seafood vendors and their suppliers;
- Increased consumer engagement on seafood sustainability topics; and
- Incentivised improvement in local fisheries, both from a management effectiveness perspective and from an environmental sustainability performance perspective.

Development of a collective



2020 to 2025

By this stage the scheme participants should be establishing a formalised structure within the South African seafood market where they co-invest in fisheries level improvements.

The main focus area for this phase:

- Engaging pro-actively in sustainable seafood initiatives, predominantly at the fisheries level.

This area of work should result in the establishment of a collective that collaboratively strives towards supporting sustainable fisheries and responsible aquaculture that benefits people and the businesses which depend on them.

TRACKING PARTICIPANT PROGRESS

STEP BY STEP:
MAKING PROGRESS



"I&J is a globally respected fishing company and manufacturer of high quality, chilled and frozen Cape Hake and a leading producer of farmed Cape Abalone. I&J is the only vertically integrated fishing company to have publically committed to sourcing sustainable seafood, back in 2012. Since 2015, I&J are proud to have maintained a commitment performance above 90% and delivered a 92% score in 2017, following difficult fishing conditions. I&J has been engaging with the Namibian Hake Association - supporting the fishery in their commitment to obtaining MSC accreditation."

Jonty Jankovich-Besan, Managing Director, I&J

I&J joined:
2012

Committed publicly:
2012

Target date:
2016
(All seafood)

Organisational
assessments
8



I&J



www.ij.co.za

Revised strategies:
www.ij.co.za



SASSI

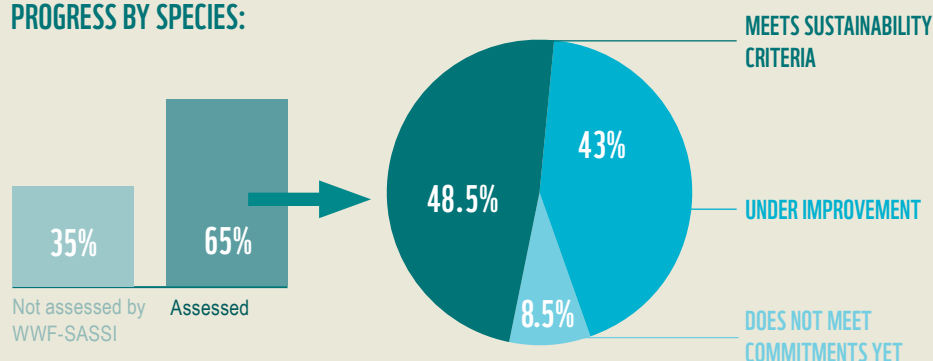
I&J remains committed to fulfilling its 2016 commitments to sustainable seafood and will continue to work with WWF-SASSI to achieve this target.

Find out more on our website or ask us about it.

wwf.org.za/sassi
FishMS: 079 449 8795

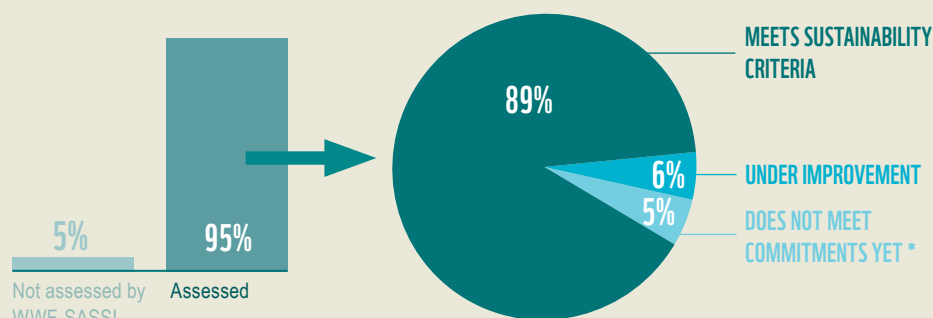
wwfsassi.co.za/sassi-app

PROGRESS BY SPECIES:

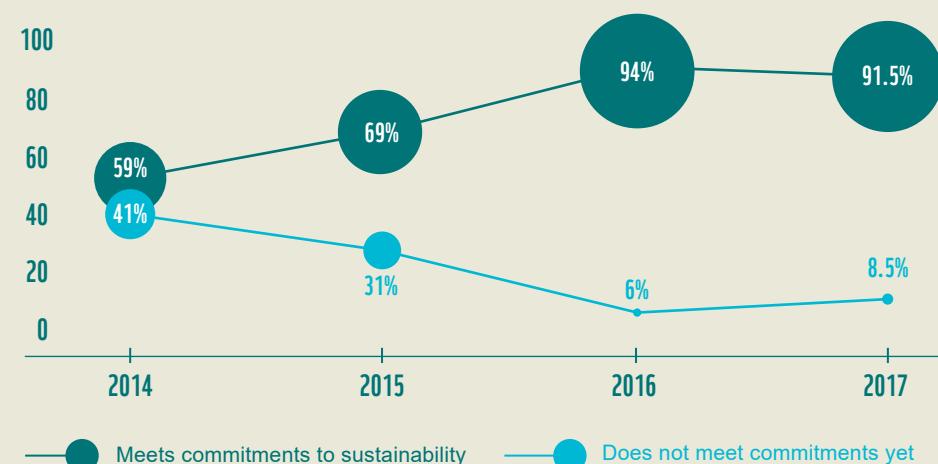


PROGRESS BY VOLUME:

(JANUARY 2017 – JANUARY 2018)



PROGRESS THROUGHOUT THE YEARS (SPECIES):



*4.5% of volume is Namibian Hake. WWF-SASSI participants are supporting the Namibian Hake Association undergoing MSC certification, scheduled to begin March 2018.



"John Dory's continues to work on areas of concern within our supply chain, in accordance with the UN Global Goals for Sustainable Development related to the sustainable management and protection of marine life. Our targets are continuously challenged by availability of sustainably sourced stocks at favourable pricing. Industry setbacks further lead to delays in our own assurance of green-listed supply. In spite of this, the procurement team works tirelessly to ensure that we stay on track to reach our goals as outlined within our promise."

Joe Stead, Environmental Sustainability Manager, Spur Corporation

John Dory's joined:
2010

Committed publicly:
2012

Target date:
2016
(All seafood)

Organisational
assessments
11

- John Dory's Fish, Grill, Sushi
- @JohnDorysSA
- www.johndorys.co.za

Revised strategies:
www.johndorys.co.za/sustainability



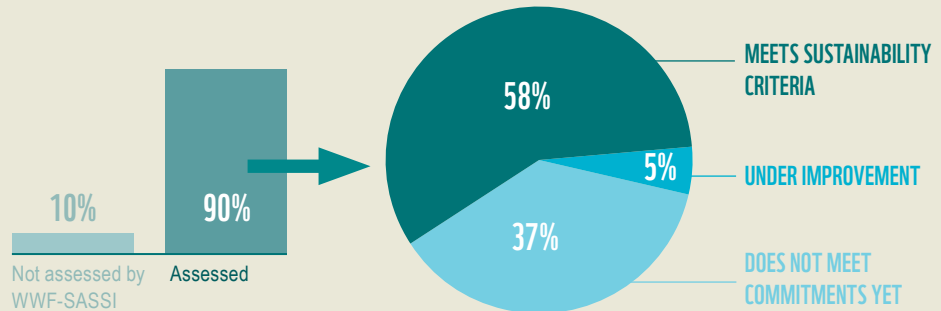
John Dory's remains committed to fulfilling its 2016 commitments to sustainable seafood and will continue to work with WWF-SASSI to achieve this target.

Find out more on our website or ask us about it.

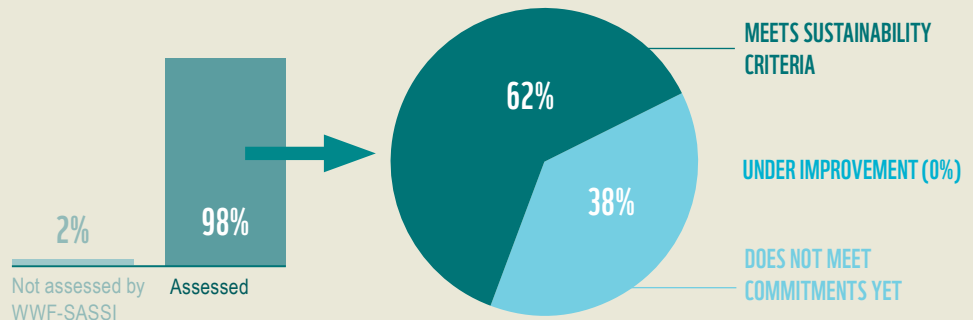
wwf.org.za/sassi
FishMS: 079 449 8795

wwfsassi.co.za/sassi-app

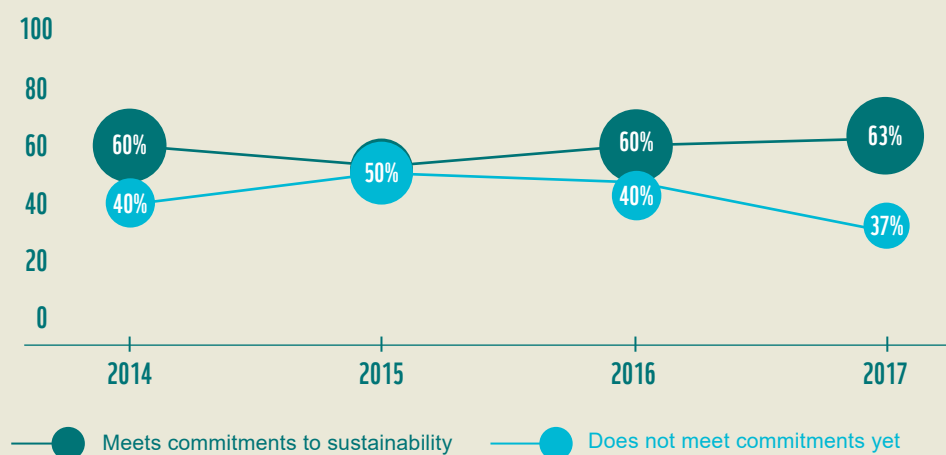
PROGRESS BY SPECIES:



PROGRESS BY VOLUME: (JANUARY 2017 – JANUARY 2018)



PROGRESS THROUGHOUT THE YEARS (SPECIES):





"As one of the founding members of the WWF-SASSI Retailer/ Supplier Participation Scheme and the first retailer in Africa to make sustainable seafood commitments, Pick n Pay is committed to continue working with our suppliers towards our sustainable seafood objectives."

Roan Snyman, Sustainability Manager, Pick n Pay

Pick n Pay joined:
2008

Committed publicly:
2011

Target date:
2016
(All seafood)

Organisational
assessments
15

f Picknpay

@PicknPay

www.picknpay.co.za

Revised strategies:
www.picknpay.co.za/
sustainable-seafood



SASSI

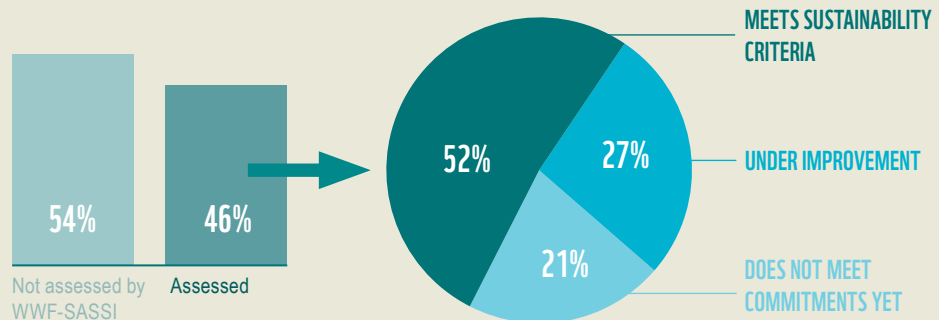
Pick n Pay remains committed to fulfilling its 2016 commitments to sustainable seafood and will continue to work with WWF-SASSI to achieve this target.

Find out more on our website or ask us about it.

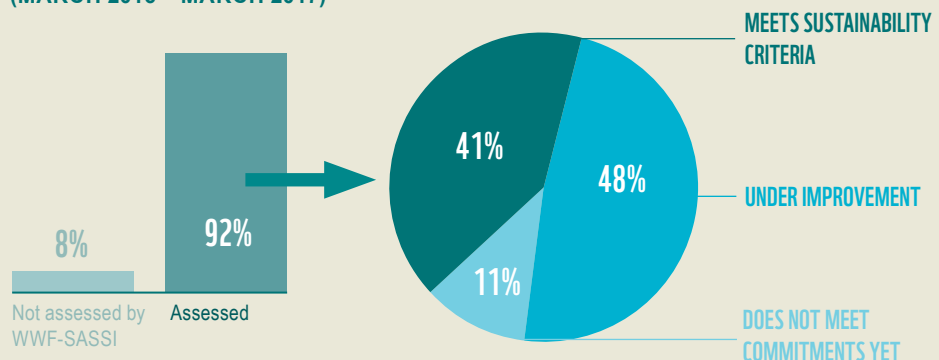
wwf.org.za/sassi
FishMS: 079 449 8795

wwfsassi.co.za/sassi-app

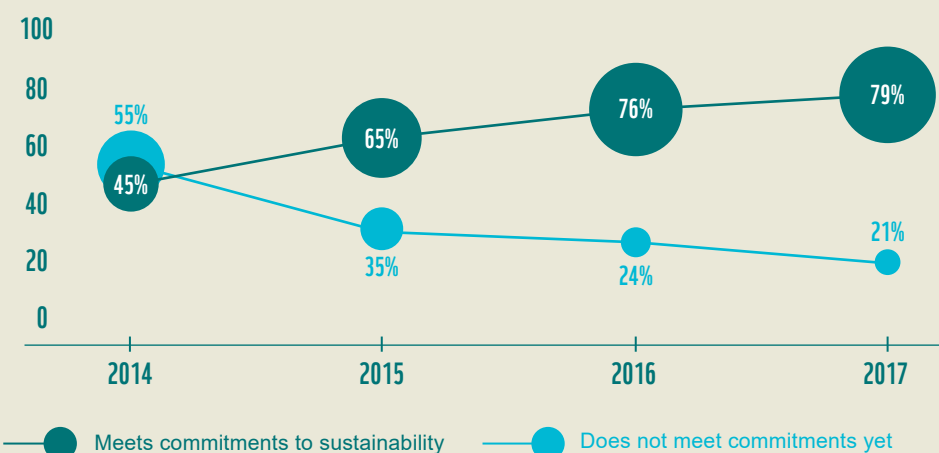
PROGRESS BY SPECIES:



PROGRESS BY VOLUME: (MARCH 2016 – MARCH 2017)



PROGRESS THROUGHOUT THE YEARS (SPECIES):




FOOD LOVER'S MARKET

"The biggest challenge we are experiencing is securing local fresh seafood from artisanal fishers. With the small quantities being landed, the fishers tend to sell to restaurants where value is added by preparation and sold at higher prices to customers than through our retail stores. We are committed to sourcing our seafood sustainably and as such we are confined to the choices presented to us by WWF-SASSI. The landings of sustainable seafood are small and therefore we are required to purchase the majority of our seafood outside of South Africa, however, we will continue to support local fishers when product is available."


Simon Wilson, Divisional Head Buyer, Foods, Coastal, Food Lovers Market



 Food Lover's Market

 @FLM_SA

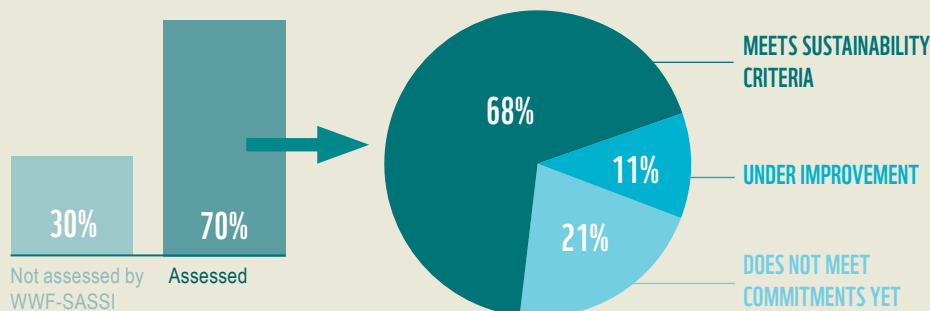
 foodloversmarket

 foodloversmarket.co.za

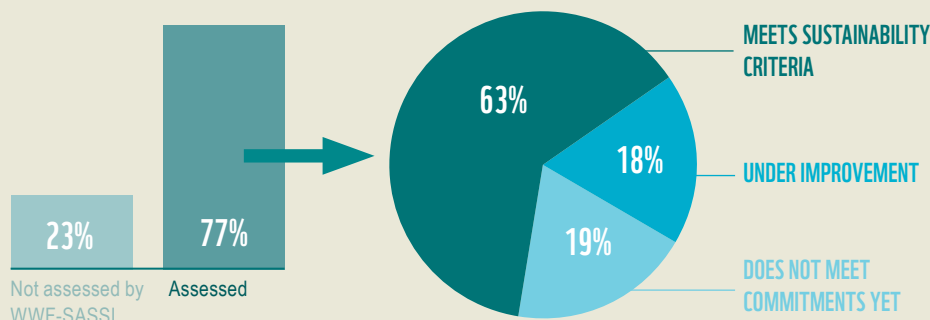
Revised strategies:
foodloversmarket.co.za/
food-lovers-market-sustain-
able-seafood-progress/



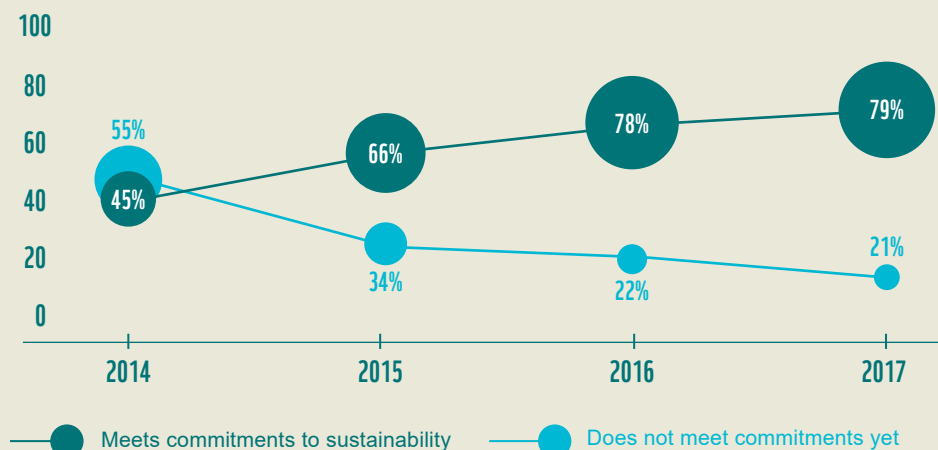
PROGRESS BY SPECIES:



PROGRESS BY VOLUME: (JANUARY 2017 – JANUARY 2018)



PROGRESS THROUGHOUT THE YEARS (SPECIES):





WOOLWORTHS

Woolworths joined:
2008

Committed publicly:
2013

Target date:
2016 **2020**
(Wild capture) (Aquaculture)

Organisational
assessments
15

WoolworthsSA

@WoolworthsGBJ

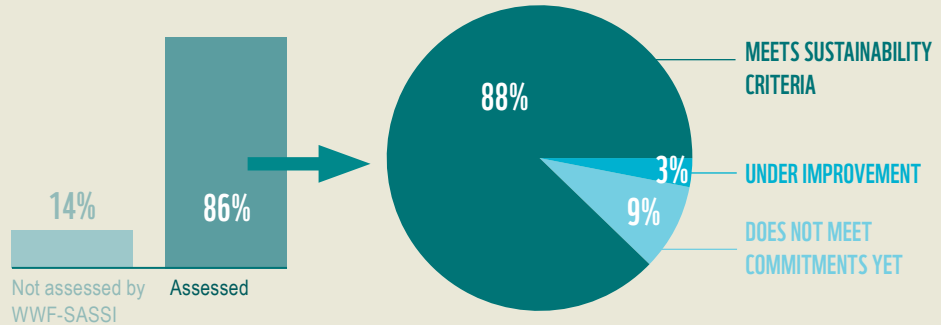
@woolworths_sa

www.woolworths.co.za/goodbusinessjourney

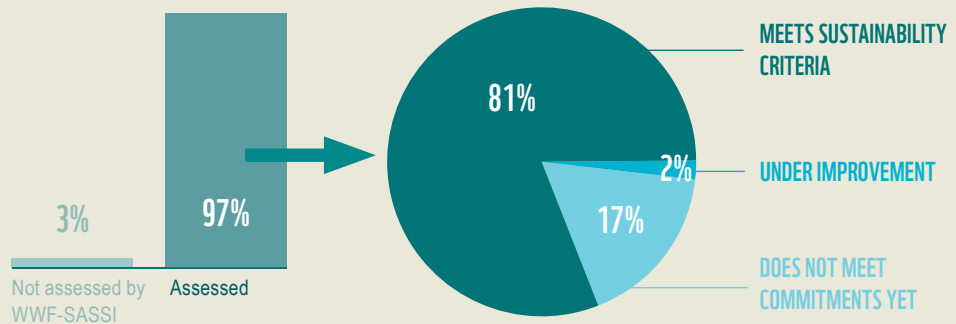
"Our challenges remain in the procuring of sustainable seafood species, such as the availability of ASC certified salmon. We nonetheless remain committed to offering our customers sustainable seafood choices."

Hezron Joseph, Seafood Technologist, Woolworths

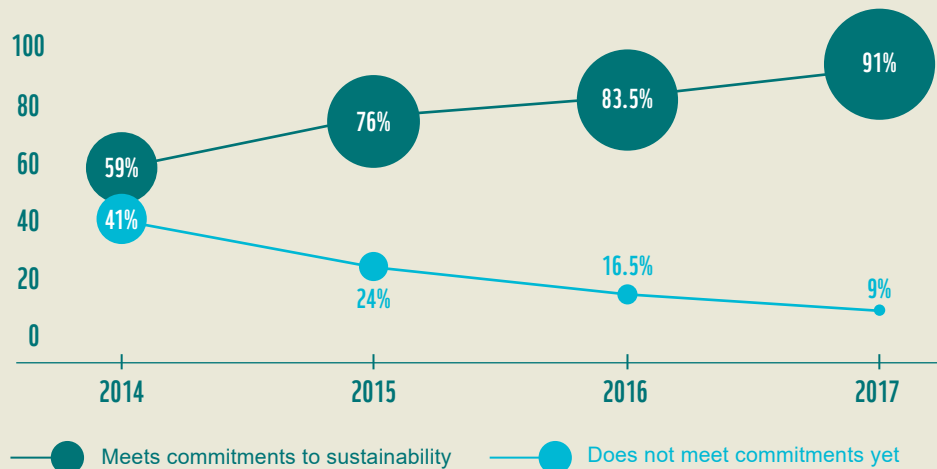
PROGRESS BY SPECIES:



PROGRESS BY VOLUME: (JULY 2016 – JULY 2017)



PROGRESS THROUGHOUT THE YEARS (SPECIES):



Woolworths has two target dates with commitment targets for 2020 illustrated above. For 2016 target of wild capture species: 90% of assessed species meets sustainability criteria and 5% is under improvement. For 2016 target of wild capture species by volume: 96% of assessed volume meets sustainability criteria and 3% is under improvement.



IN PARTNERSHIP WITH
WWF-SASSI, WE'RE
WORKING TO MEET OUR
SUSTAINABLE SEAFOOD
COMMITMENTS BY
END 2020.

woolworths.co.za/seafood
www.wwf.org.za/sassi



"In partnering with WWF-SASSI, SPAR has made significant strides in ensuring that our Private Label procures seafood from sustainable fisheries and responsible farming operations. We continuously conduct assessments on our seafood to ensure that it aligns to the Group's commitments. Increased assessments by WWF-SASSI have improved traceability and transparency of our products. We have been engaging with external suppliers, assessing procurement and training our staff as we look to extend our commitment beyond our Private Label. We remain committed to working with WWF-SASSI to ensure the sustainability of our seafood resources."

Kevin O'Brien, Group Risk and Sustainability Executive, SPAR Group



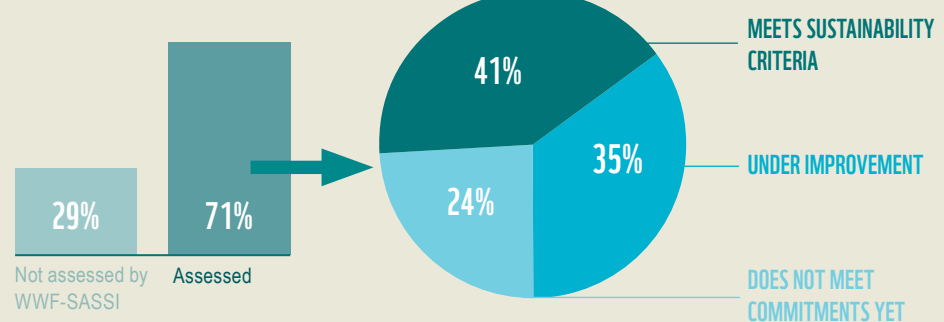
f myspar

www.spar.co.za

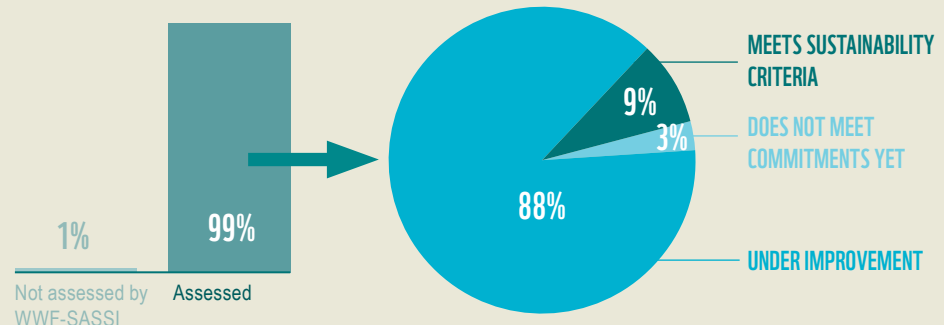
Revised strategies:
www.spar.co.za/stories/
view/SPAR-cares/sustain-
able-seafood-from-SPAR



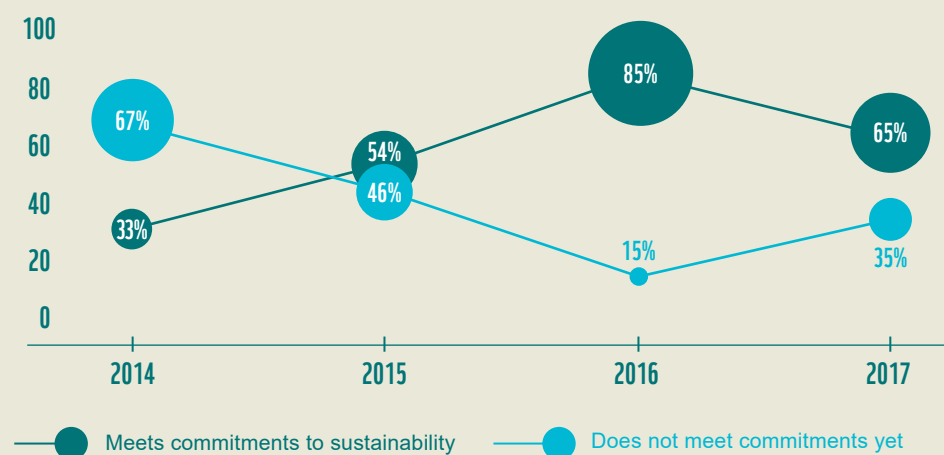
PROGRESS BY SPECIES:



PROGRESS BY VOLUME: (JANUARY 2017 – JANUARY 2018)



PROGRESS THROUGHOUT THE YEARS (SPECIES):



OceanBasket



"An ongoing challenge is consumers' reluctance to sample "new" certified species versus traditional species that are now at risk, as well as matching the consumers' expectations on responsible sourcing with their willingness to pay more. We have, however, successfully introduced two sustainably farmed fish onto menus - tilapia and trout - which have been very well-received. In addition, we are rolling out biodegradable straws and environmentally friendly take-away packaging across SA to curb the use of plastics in-store."

Jean Sloane, Group Marketing Executive, Ocean Basket

Ocean Basket joined:
2010

Committed publicly:
2014

Target date:
2017 **2020**
(Wild capture) (Aquaculture)

Organisational
assessments
8

- OceanBasket
- @TheOceanBasket
- Ocean_Basket
- www.oceanbasket.com

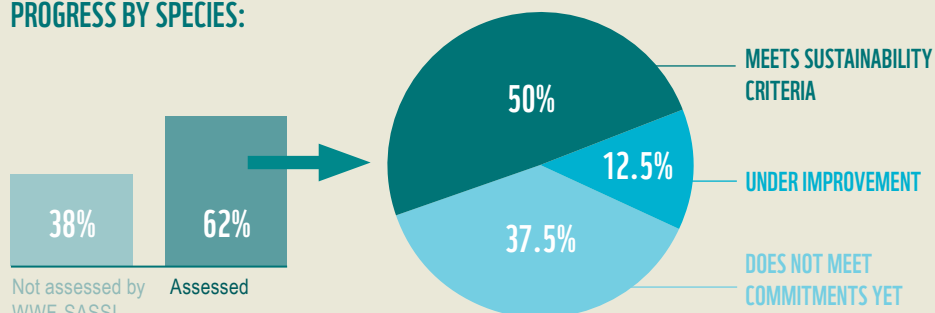
Revised strategies:
oceanbasket.com/responsible_ocean_citizens

Ocean Basket remains committed to fulfilling its 2017 commitments to sustainable seafood for wild-caught fish. We will continue to work with WWF-SASSI to meet that target as well as our 2020 target for farmed seafood products.

Find out more on our website or ask us about it.

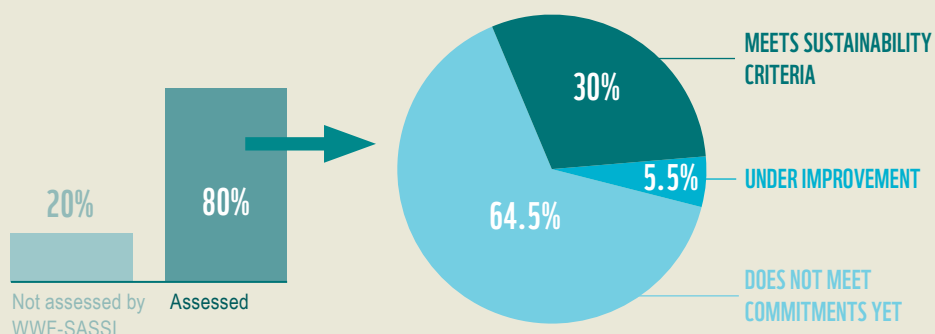
wwwf.org.za/sassi
FishMS: 079 449 8795
wwwfassi.co.za/sassi-app

PROGRESS BY SPECIES:

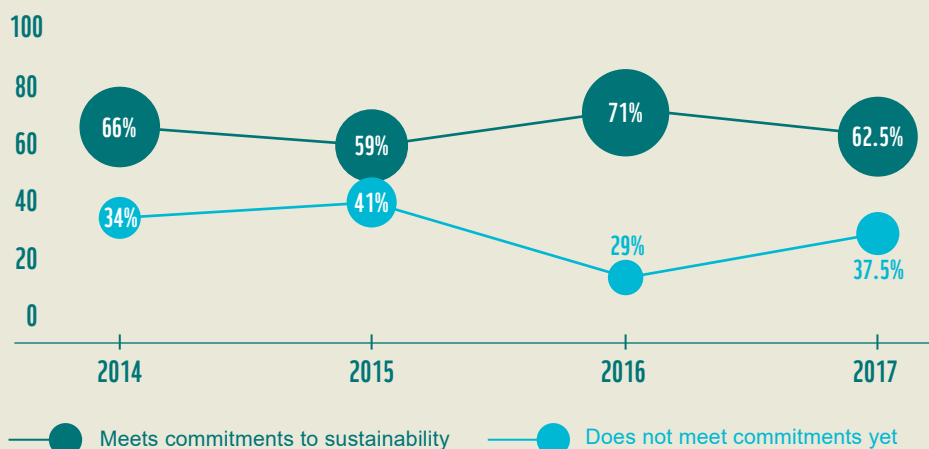


PROGRESS BY VOLUME:

(JANUARY 2016 – JANUARY 2017)



PROGRESS THROUGHOUT THE YEARS (SPECIES):



Ocean Basket has two target dates with commitment targets for 2020 illustrated above. For 2017 target of wild capture species: 39% of assessed species meets sustainability criteria and 17% is under improvement. For 2017 target of wild capture species by volume: 20% of assessed volume meets sustainability criteria and 6% is under improvement.



"Sun International, through its newly formed Sustainability Department, remains committed to working collaboratively with WWF-SASSI to advance our sustainable seafood programme. We are actively engaging with suppliers to promote and monitor responsible seafood practices, whilst educating our own employees to provide our guests with sustainable seafood choices."

Jannette Horn, Head of Sustainability, Sun International



suninternational

@MillionThrills

corporate.suninternational.com/sustainability/

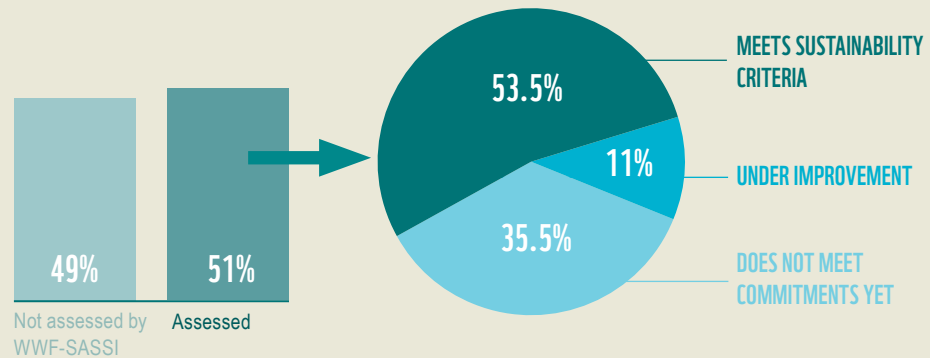
Sun International have committed to ensuring that by 2018, all seafood served will be either:

- MSC certified, or
- ASC certified, or
- WWF-SASSI Green-listed, or
- In a formal Improvement Project.

Ask us about our Green-listed options.

FishMS: 079 499 8795
wwf.org.za/sassi

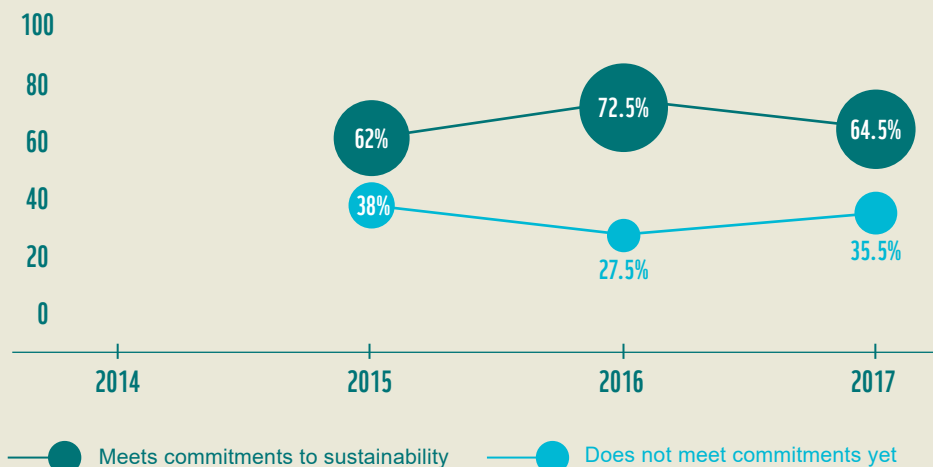
PROGRESS BY SPECIES:



PROGRESS BY VOLUME:

*Sun International's volume / value information is not available

PROGRESS THROUGHOUT THE YEARS (SPECIES):





"Sustainability is about the future. Breco Seafood's vision is to procure fish at sustainable levels that ensure continuity into the future and beyond, to purchase fish responsibly and comply with relevant laws and to adapt to changes within the fisheries be it cyclical, cultural, environmental amongst others. We've set standards and goals so that we can audit the progress made in our sustainability effort."

Kevin Jones, Business Development, Breco Seafoods

Breco Seafoods joined:
2012

Committed publicly:
2014

Target date:
2021
(All seafood)

Organisational
assessments
5

breco.seafoods

@Breco_Seafoods



SASSI

Breco Seafoods are working with WWF-SASSI to ensure that by 2021, all seafood sold will either be:

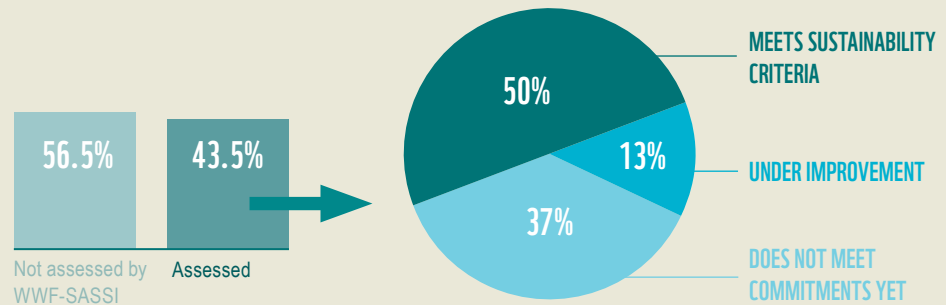
- MSC certified, or
- ASC certified, or
- WWF-SASSI Green-listed, or
- In a formal Improvement Project.

Find out more on our website or ask us about it.

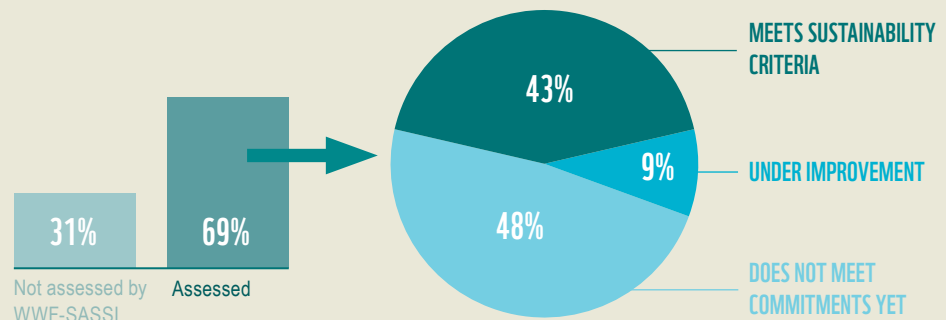
wwf.org.za/sassi
FishMS: 079 449 8795

wwfsassi.co.za/sassi-app

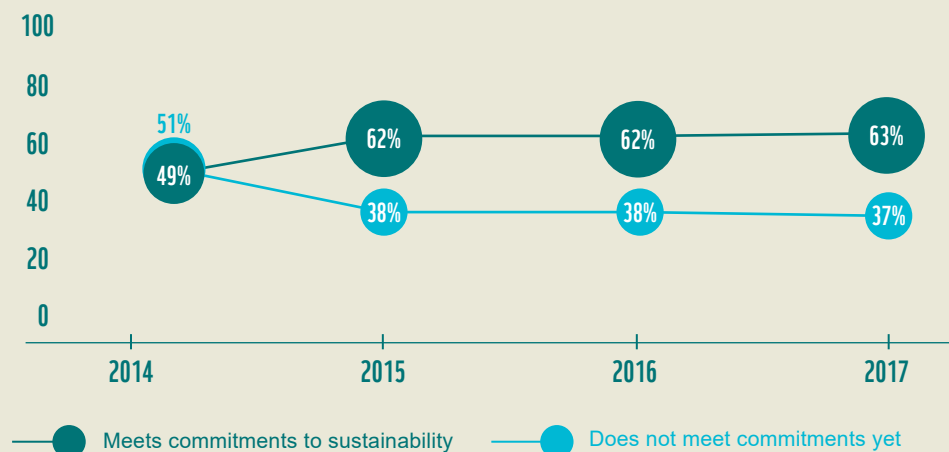
PROGRESS BY SPECIES:



PROGRESS BY VOLUME: (JANUARY 2017 – JANUARY 2018)



PROGRESS THROUGHOUT THE YEARS (SPECIES):



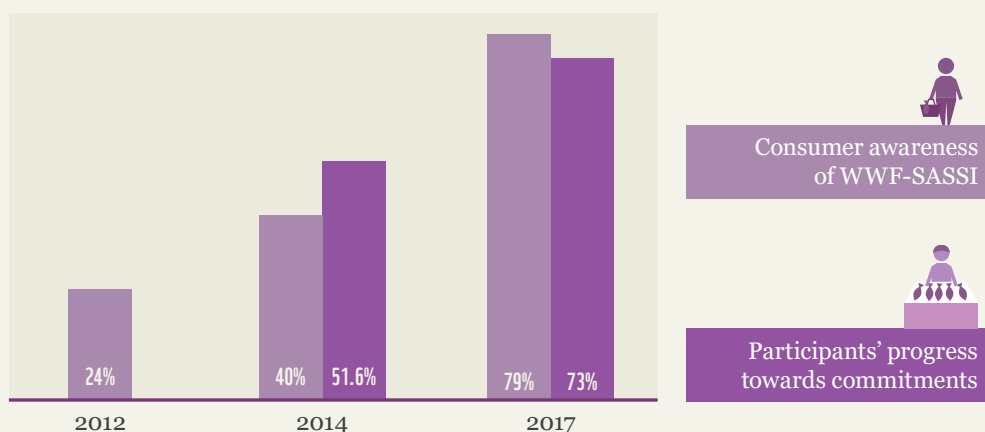
CONSUMER PERSPECTIVES

Since WWF-SASSI's inception in 2004, it has gained significant traction with consumers who want to play a role in creating healthy oceans.

Today, consumers in South Africa eat more seafood than ever before, making it the second most consumed protein after eggs. However, consumers have also become more aware about seafood sustainability as WWF-SASSI's efforts to conscientise them to this issue have increased.

This in turn is driving participants to transform their seafood procurement approach which has resulted in an increasing amount of sustainable seafood being available on the market.

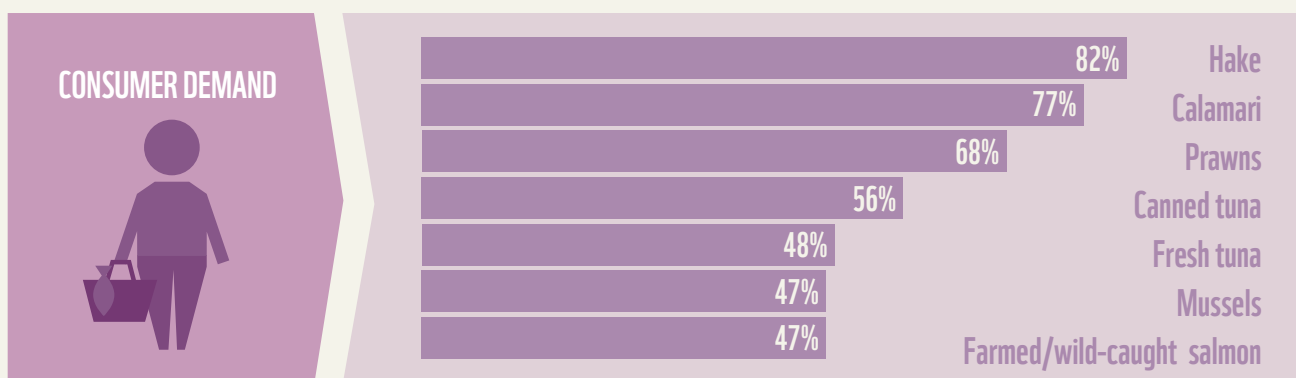
The most recent WWF-SASSI consumer survey took place in June 2017, with over 1 000 South African seafood consumers surveyed by an independent third party. Some of the results are reflected in the graphs.



REF: Change Agent SA. 2017. National SASSI Consumer Survey; Added Value. 2012. 2014. National SASSI Consumer Survey; WWF-SASSI Retailer/ Supplier Participation Scheme Report. 2014.

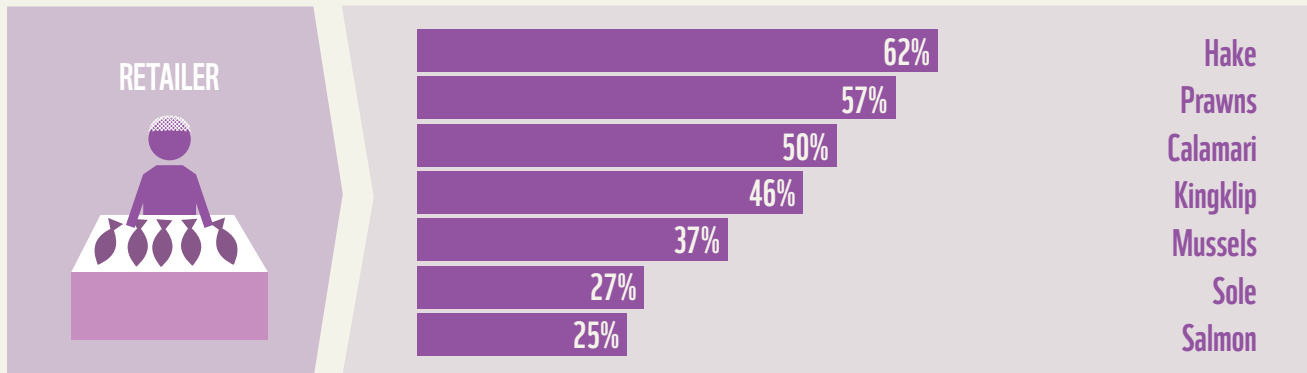
How retailers have a role to play

The 2017 WWF-SASSI survey showed that the most commonly consumed seafood products include hake, calamari, prawns, canned tuna, fresh tuna, mussels, farmed and wild-caught salmon.



REF: Change Agent SA. National SASSI Consumer Survey. 2017.

These findings showed a similar outcome to that of research on seafood trade dynamics and market trends highlighted in the 2014 WWF report "From Boat to Plate" which showed that hake was the highest ranking seafood traded, followed by prawns and calamari.



WWF Report. 2014. *From Boat to Plate, Linking the seafood consumer and supply chain*. 44pp.

The 2017 WWF-SASSI survey results correlate fairly well with the species and products where participants have been focussing their effort in terms of sustainable procurement.

That being said, it is important to note that individual product categories (such as hake) are made up of different species, harvested using different methods and produced in countries around the world and therefore, the sustainability status differs even within these categories.

While many of the species that make up the different product categories come from sustainable sources, some do not. Therefore, participants have needed to find ways to incentivise transformation of the fisheries and farms where the unsustainable species are coming from, as these are key species to their businesses in terms of volume sold.

Successes and challenges

One successful collaborative initiative bore results when in 2015, scheme participating companies sent a joint letter to the Namibian Hake Association to request improvements in the fishery, resulting in a commitment to initiate the process of having the fishery certified against the MSC standard for sustainably wild-caught seafood.

Concurrently, many participants are in the process of implementing consistent procurement strategies for products such as canned tuna, prawns and salmon (wild-caught and farmed) to ensure their suppliers are implementing best practice in the supply chain and supporting fisheries and suppliers that are working towards more environmentally responsible practices.

Some participants have even progressed to a stage where they have MSC certified canned tuna, ASC certified Atlantic (farmed) salmon and/ or ASC certified prawns on their shelves, a significant positive shift for the South African seafood market.

Calamari or squid, however, remains a challenge - especially considering that according to the survey it has now become the second most consumed seafood in South Africa.

While many of the squid species harvested and the fishing methods used to target squid are considered sustainable, there are some that are key to many participants that are on the WWF-SASSI Orange-list due to uncertainties regarding the extent of fishing pressure on the stocks from illegal, unregulated, unreported (IUU) vessels.

One of the ways to change this is to put pressure on suppliers and importers to drive supply chain transparency and to incentivise source fisheries to report catches and provide the level of information required to effectively manage squid stocks.

Challenges such as these may seem insurmountable at an individual company level, however, through effective collaboration participants can collectively drive the necessary positive change in fishing sectors that provide the seafood that consumers demand.

Calamari remains a challenge - especially considering that it has now become the second most consumed seafood in South Africa.

CONCLUSION

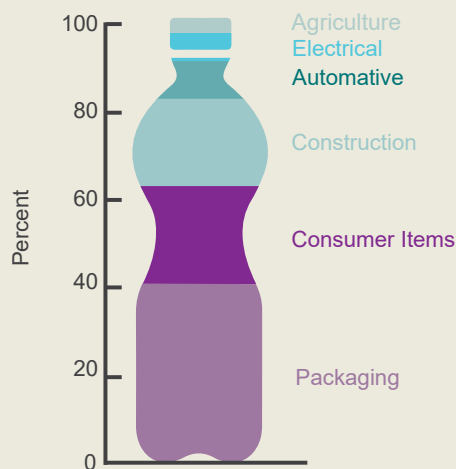
It is hugely encouraging to see the continued growth of the global sustainable seafood movement.

It is equally encouraging to see the important contributions that the South African retailer and supplier participants have made towards creating a responsible and sustainable seafood industry.

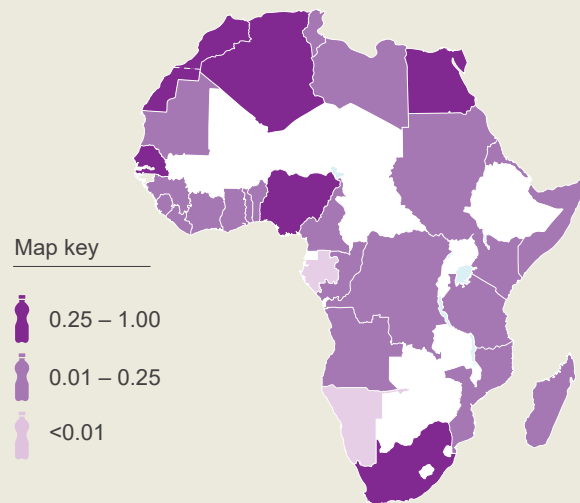
Despite the growing challenges facing our fishing industry, committed participants have continued to improve their sustainability performances and have shown their willingness to leverage further change through pre-competitive collaboration.

This vision of responsible businesses working together to create a thriving and sustainable seafood sector remains WWF's driving ambition. Excitingly, this vision is also increasingly permeating our participant's broader business activities, with 2017 being the first year in which we have seen some of the participants make clear commitments to reducing harmful single-use plastics such as straws.

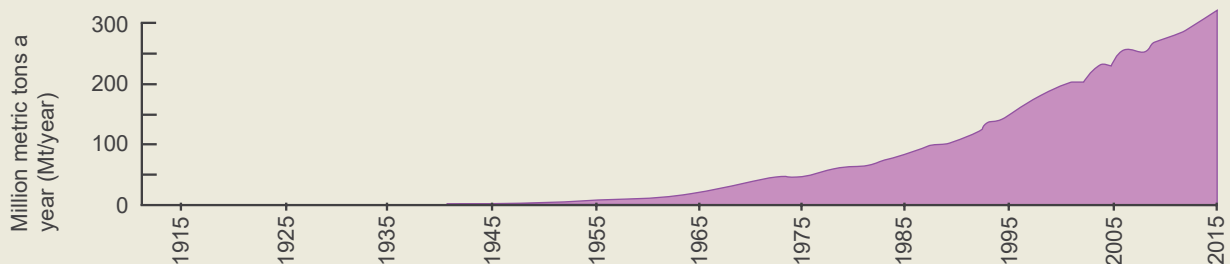
GLOBAL USAGE PATTERNS OF PLASTIC PRODUCTION IN 2016



PLASTIC WASTE AVAILABLE TO ENTER THE OCEAN IN 2010 (MILLION TONS)



GLOBAL PLASTIC PRODUCTION



Reference for the above figures: Worm, B., Lotze, H.K., Jubinville, I., Wilcox, C., Jambeck, J. 2017. Plastic as a persistent marine pollutant. *The Annual Review of Environment and Resources*. 42, p. 1-29.



THE WWF-SASSI TOOLS



Website

wwf.org.za/sassi



FishMS

079 499 8795



Pocket guide and posters

Available online: shop.wwf.co.za



Mobile app

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WWF-SASSI REACH FOR 2017

100%
RECYCLED



11 000+

downloads of the mobile app
since the re-launch in June 2015

82 500+

enquiries on seafood
sustainability status
received via FishMS
079 499 8795

41 600+

visitors to the WWF-SASSI
website www.wwf.org.za/sassi



5 200+

Twitter followers @WWFSASSI with
>530 300 tweet impressions

700+

Instagram followers @WWFSASSI



Why we are here

To stop the degradation of the planet's natural environment and
to build a future in which humans live in harmony with nature.

www.wwf.org.za

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