



SOUTH AFRICA

OCEANS OF CHANGE: WEATHERING STORMS



**WWF-SASSI RETAILER/ SUPPLIER
PARTICIPATION SCHEME REPORT 2020-21**



ABOUT THIS REPORT

This seventh 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. It also reflects on the long-term impacts of climate change on our collective oceans and local seafood supply chain.

This combined 2020 and 2021 reports showcase seafood traders' public commitments when it comes to procuring and selling sustainable seafood. In turn, their commitments create a strong market incentive for large and small-scale fisheries to improve their practices, and suppliers can ensure that they are buying from responsibly managed fisheries.



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This report is available online at: https://www.wwf.org.za/our_research/publications/

WWF is one of the world's largest and most respected independent conservation organisations with over 6 million supporters and a global network active in more than 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.

WWF South Africa is a national office in the global WWF network. Started in South Africa in 1968, we are a local NGO with a vision of building a sustainable and equitable future in which humans and nature thrive. We work to champion the Earth's capacity to provide a source of inspiration, sustainable food, fresh water and clean energy for all. For Nature. For You.

wwf.org.za

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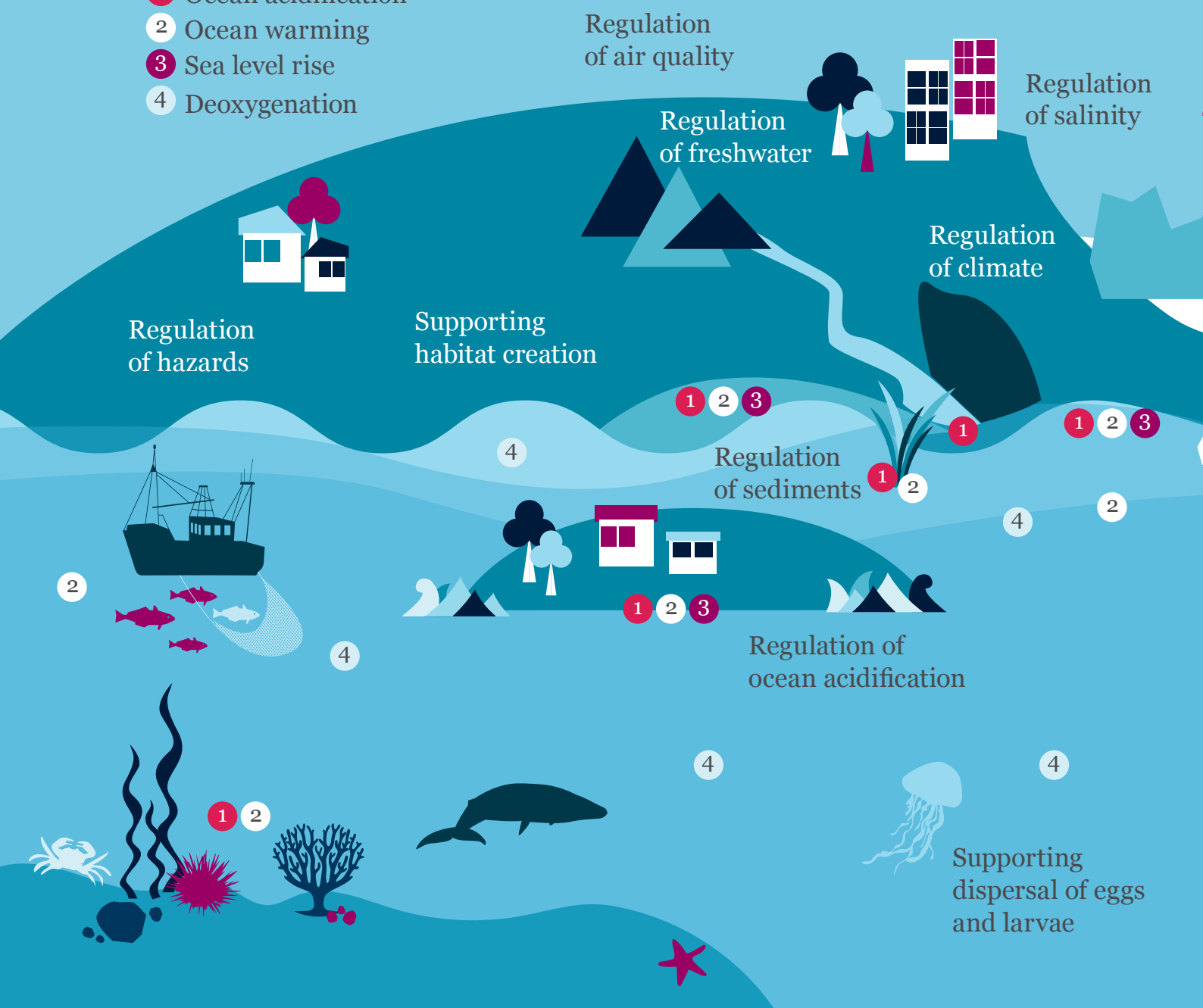
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CHANGING CLIMATE OF OUR OCEANS

The ocean is essential for all aspects of human well-being and livelihoods. It also provides key atmospheric and ecosystem services like climate regulation through the storing of carbon, heat distribution, nutrient cycling, food and employment. It is unequivocal that human activity has resulted in widespread and rapid changes in the ocean. Decisive action is needed from all sectors of society, including the influential private sector, to work together to enable a healthy and productive ocean for our shared future.

01 MAJOR CLIMATE IMPACTS ON OUR OCEANS

- 1 Ocean acidification
- 2 Ocean warming
- 3 Sea level rise
- 4 Deoxygenation



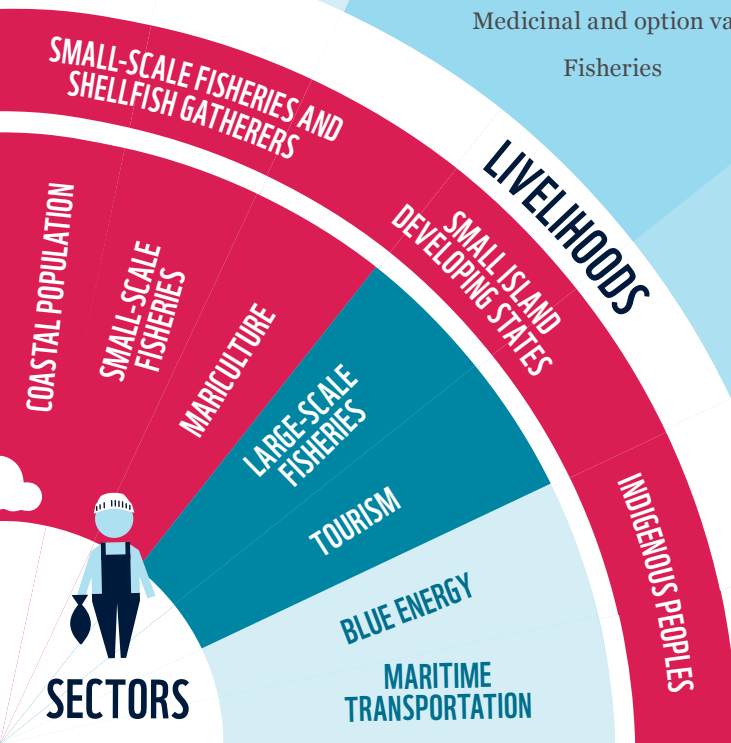
CULTURAL

Physical and psychological well-being
Recreation
Supporting identities

02

LIVELIHOODS AND ECONOMIC SECTORS MOST VULNERABLE TO THE IMPACTS OF CLIMATE CHANGE IN THE OCEANS

- Very high vulnerability
- High vulnerability
- Low vulnerability



ECOSYSTEM SERVICES

PROVISIONING

Fiber and food
Medicinal and option value
Fisheries

REGULATION

Regulation of hazards
Regulation of sediments
Regulation of salinity
Regulation of ocean acidification
Regulation of climate
Regulation of air quality
Supporting habitat creation
Supporting dispersal of eggs and larvae

03

SOLUTIONS/APPROACHES TO STABILISE OCEANS AND CLIMATE

SOLUTIONS/APPROACHES TO STABILISE OCEANS AND CLIMATE



OCEAN NATURE-BASED SOLUTIONS

- Restore/Improve/Rehabilitate
 - Ecosystems, including fish stocks
 - Coastal hydrology, including rivers into estuaries and seas
 - Coastal vegetation, including mangroves and seagrasses
 - Kelp forests and coral reefs
- Rewild the oceans, e.g., seaweed aquaculture



SUSTAINABLE MARINE RESOURCE USE

- Promote sustainable seafood consumption
- Improve fish stocks through fishery improvement projects
- Drive responsible fishing and farming practices
- Eliminate extraction of non-living marine resources, e.g., seabed mining



INTEGRATED MARINE SPATIAL PLANNING

- Ensure effective marine spatial planning
- Create a network of marine protected areas (MPAs)
- Responsive and adaptive management of endangered, threatened and protected species
- Reduce pollution from all sources



VULNERABLE COASTAL COMMUNITIES

- Support alternative and supplementary livelihoods
- Increase including local beneficiation
- Include indigenous and local knowledge and perspectives into oceans management
- Co-management of resources and MPAs



ROLE OF BUSINESS

- Investing in blue carbon ecosystems projects
- Supporting blue carbon credits
- Building resilient and local supply chains
- Playing an advocacy role to influence nature positive policy
- Decarbonise ocean-based transport

FORWARD THINKING

Will we weather the climate storm?

Not since World War II has the world's population faced the kind of challenges posed by the Covid-19 pandemic in 2020/21. Aside from being one of the worst human tragedies, we saw various impacts on the natural environment – some good, some not so good, some indirect and short-term, and others leaving an indelible, devastating mark.

The pandemic also interrupted economies, it disrupted human activities and forever altered the course of how the world's businesses operate. Plus, it brought into stark relief the inequalities in our societies, the flaws within our current food system and how vulnerable and unprepared developing economies, in particular, are to major disruptive changes. As British poet Damian Barr writes “We are not all in the same boat, but we are all in the same storm”. The Covid-19 pandemic also reminded us that our humanity, kindness and altruism are key to weathering any storm successfully, along with building resilience and inclusion, and future-proofing places and people.

While this genetic chimera played out in the foreground, for a number of years humankind's irresponsible actions have been influencing our planet for the worse – in the form of human-induced climate change. Human activities have drastically altered the planet's climate, landscapes and seascapes, and while much of the world's focus has been on climate solutions for the landscapes, the seascapes have gone largely unnoticed. As UN Secretary-General António Guterres said in June 2022, “Sadly, we have taken the ocean for granted, and today we face what I would call an ocean emergency. We must turn the tide. A healthy and productive ocean is vital to our shared future.”



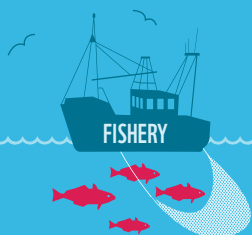
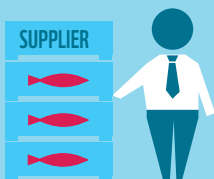
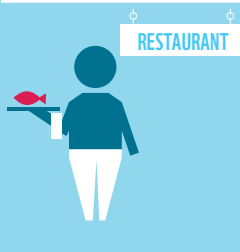
The ocean spans 70% of the earth's surface and absorbs 90% of the excess heat from greenhouse gas emissions.

The ocean offers powerful solutions to the climate crisis. Spanning about 70 per cent of the Earth's surface, the ocean absorbs more than 90 per cent of the excess heat from greenhouse gas emissions that threaten the planet's biodiversity and human well-being. It has also become evident that the ocean has the potential to account for one-fifth of the global carbon emissions reductions needed to meet the ambitious goal of the Paris Agreement: limiting global temperature rise to 1.5 degrees Celsius above pre-industrial levels. This can be achieved through nature-based solutions that regenerate and protect “blue carbon” ecosystems such as mangroves, salt marshes, seagrasses, coral reefs and kelp forests, which can store more carbon per area unit than forests on land.

We need the private sector to invest in a sustainable blue economy, support blue carbon efforts and help build local, resilient supply chains. To effect change in South Africa's seafood markets, WWF and WWF-SASSI established the voluntary business platform called the WWF-SASSI Retailer/Supplier Participation Scheme. This scheme engages South Africa's top seafood vendors to facilitate the adoption of sustainable seafood practices within their businesses to help address current issues facing our oceans. As the participants within the scheme continue to work toward meeting their seafood commitments, the impacts of the Covid-19 pandemics can clearly be noted in the decline in progress towards commitments in 2020 for most of the participants. Amidst these storms, the scheme works toward long-term changes that will protect vital marine ecosystems and build resilient seafood supply chains, thereby enabling a shift in consumer diets, supporting local communities, improving food security and addressing climate change.



**CONSUMER
AWARENESS**
TRIGGERS A REACTION
THROUGH THE ENTIRE
SUPPLY CHAIN



TRACKING PARTICIPANT PROGRESS

**STEP BY STEP:
MAKING PROGRESS**

SPUR CORPORATION

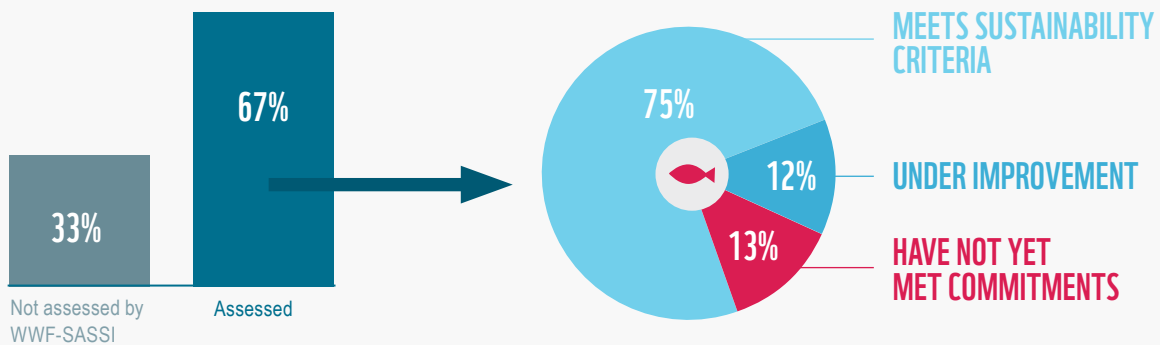


“John Dory’s continues to drive its promise to procure sustainably managed seafood. In partnership with WWF-SASSI and Spur Group’s Procurement Team, the brand is able to source the best quality produce at competitive pricing that meet our customers’ needs. John Dory’s remains committed to our sustainability journey and focussed environmental criteria to ensure future viability of seafood resources and the health of our oceans, not only for our brand, but also the communities relying on seafood as a primary source of protein.”

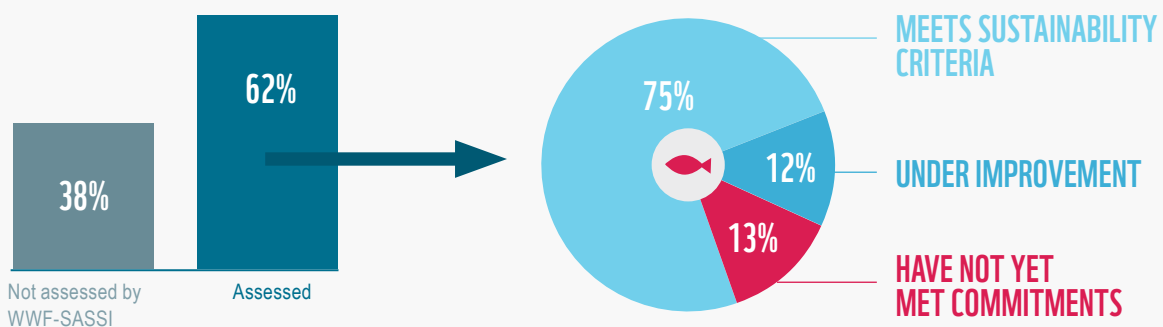
Joe Stead, Environmental Sustainability Manager, Spur Corporation

PROGRESS BY SPECIES

2020

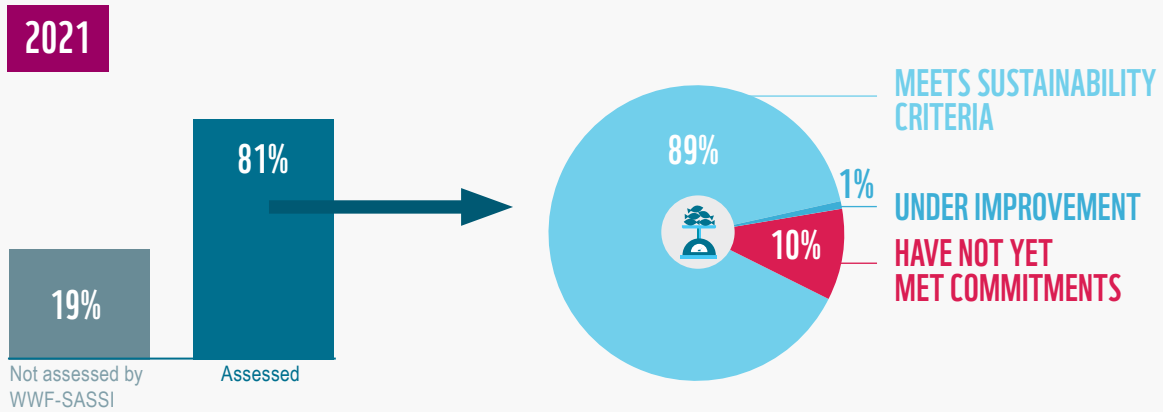
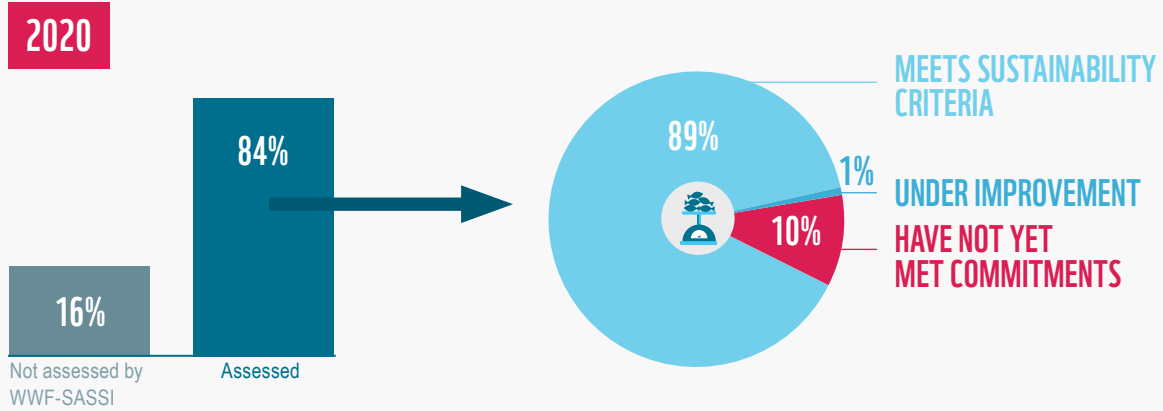


2021

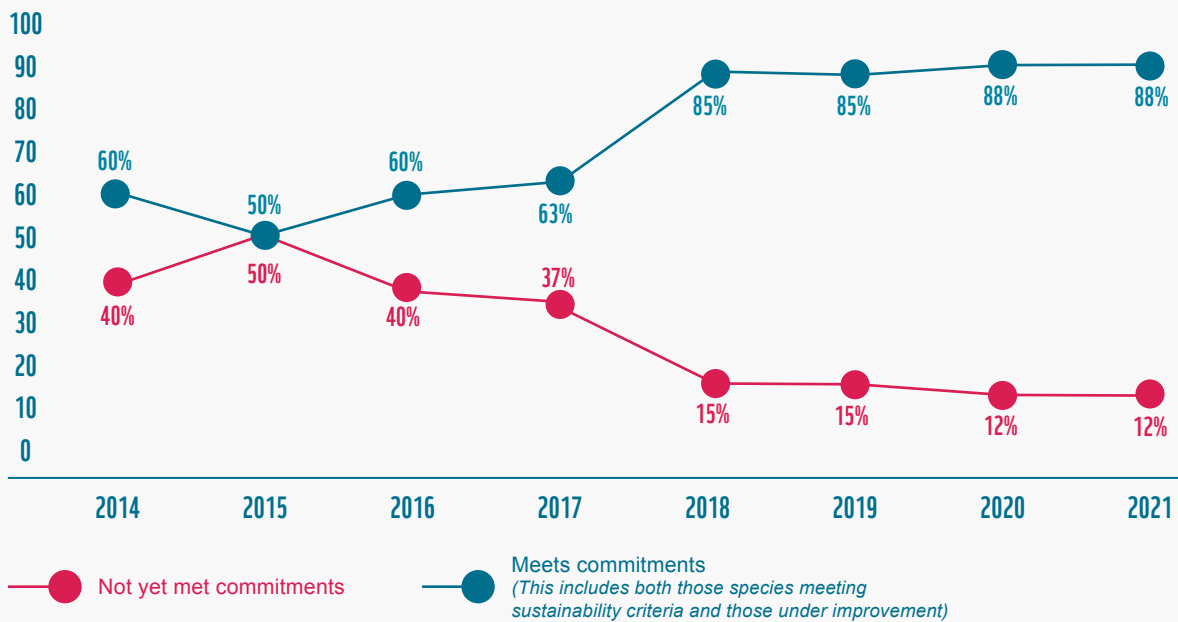


Revised strategies: www.johndorys.co.za/sustainability my John Dory’s Fish, Grill, Sushi myJohnDorysSA

PROGRESS BY VOLUME



JOHN DORY'S PROGRESS THROUGH THE YEARS (SPECIES)



PICK N PAY

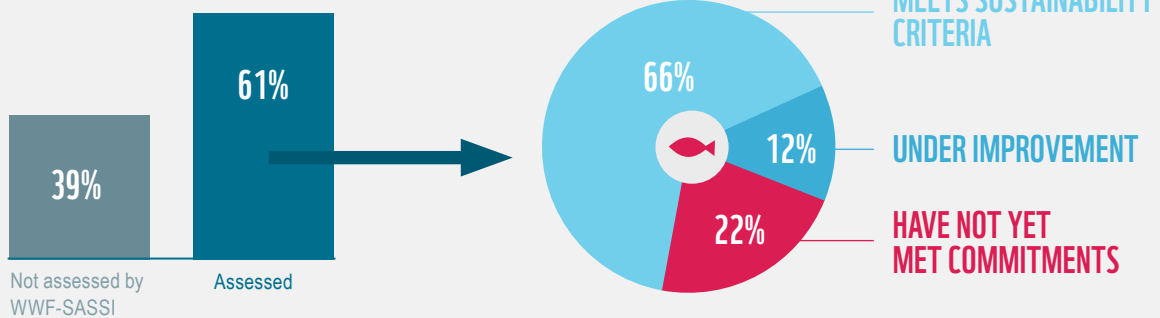


“Pick n Pay remains committed to the transformation of our seafood & fish related operations to ensure that our seafood products are sustainably sourced and either procured from the SASSI green list, are MSC or ASC certified, or from fisheries actively engaged in a Fishery Improvement Project (FIPS). As a retailer with thousands of suppliers and millions of customers, we are mindful of our wide reach and the environmental impact we have across our value chain. We work closely with WWF-SA to achieve our sustainable seafood commitments and provide customers with a wide range of sustainable sourced seafood products.”

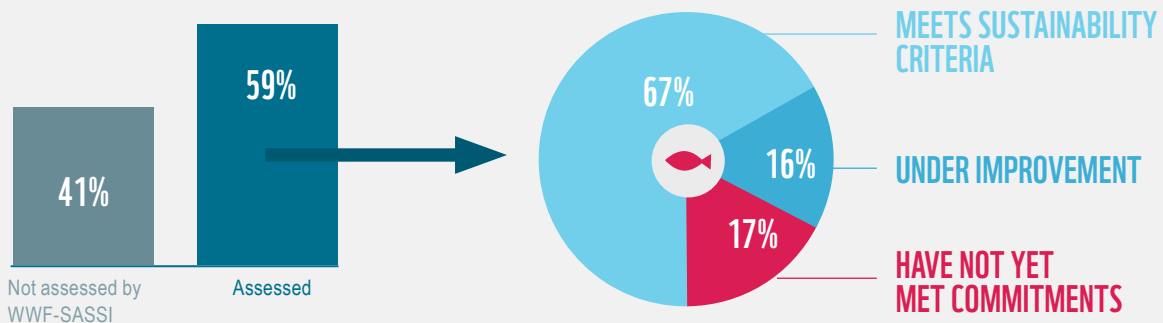
Andre Nel, General Manager for CSI & Sustainability, Pick n Pay

PROGRESS BY SPECIES

2020



2021



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



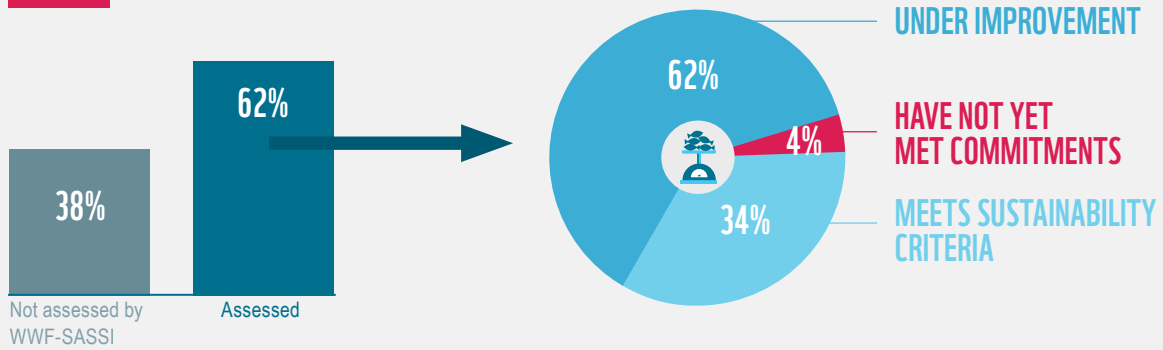
Picknpay



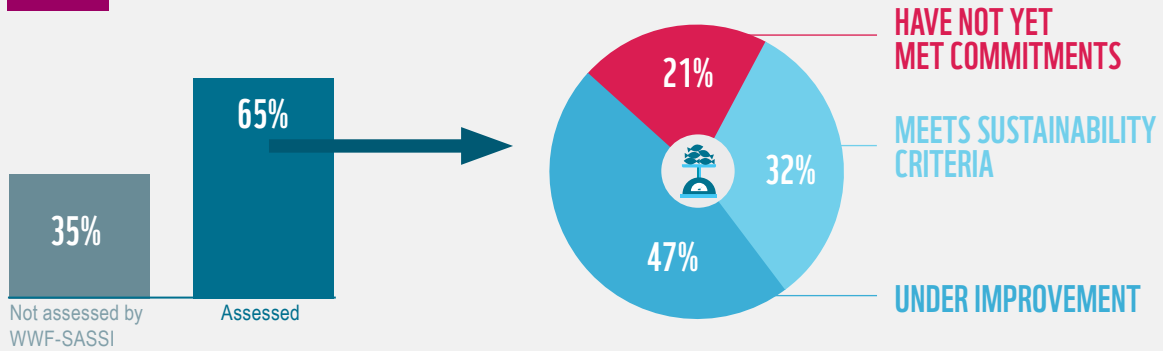
PicknPay

PROGRESS BY VOLUME

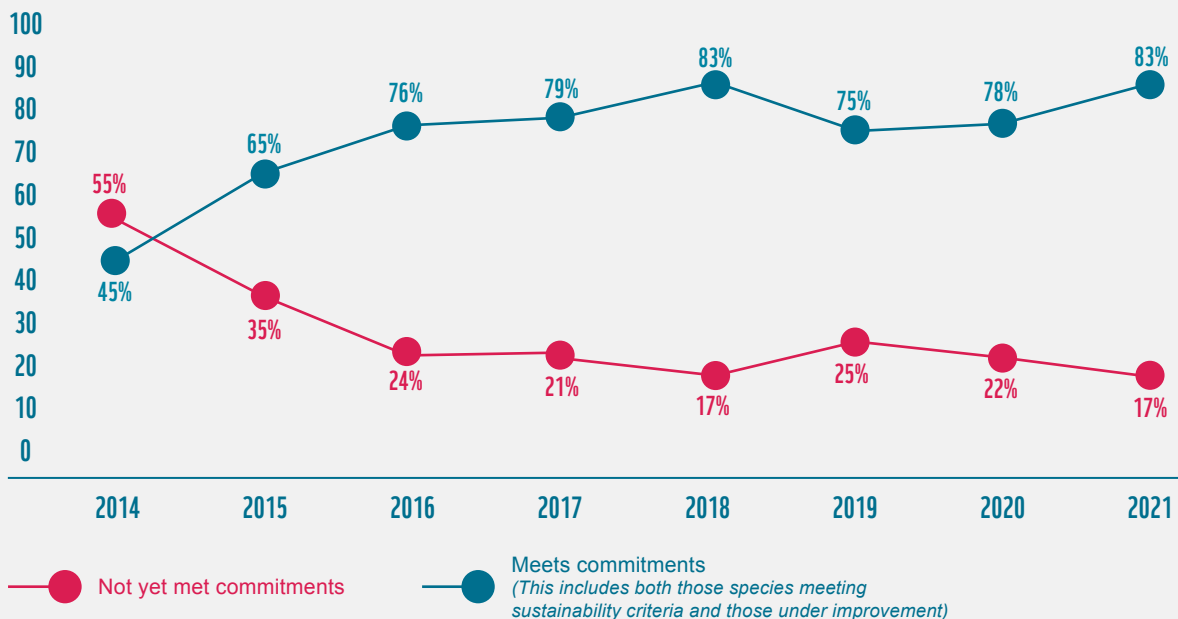
2020



2021



PICK N PAY PROGRESS THROUGH THE YEARS (SPECIES)



FOOD LOVER'S MARKET

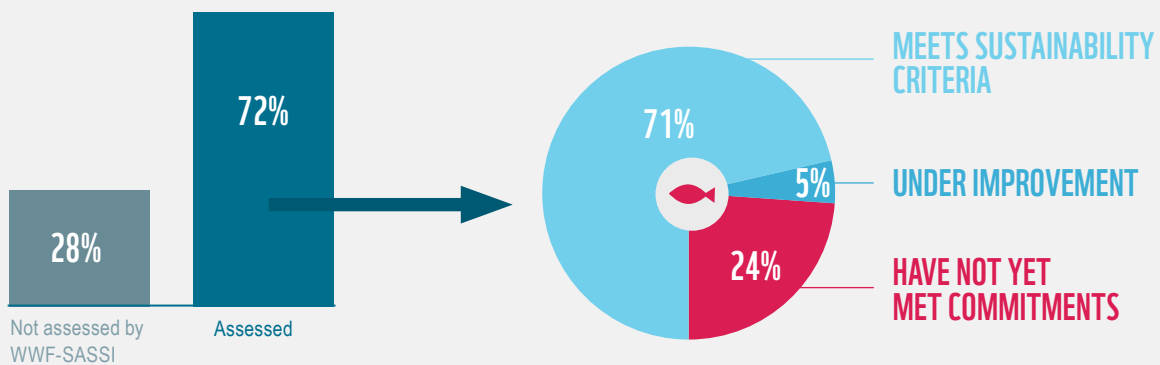


“Food Lover’s Market was founded on our core family values that include being able to put good, affordable food on your table for generations to come. Through our Earth Lover’s programme we feel it is essential to preserve and enrich our oceans through sustainable fishing practices so that these future generations can enjoy not only the taste of the ocean, but the natural wonders of it too.”

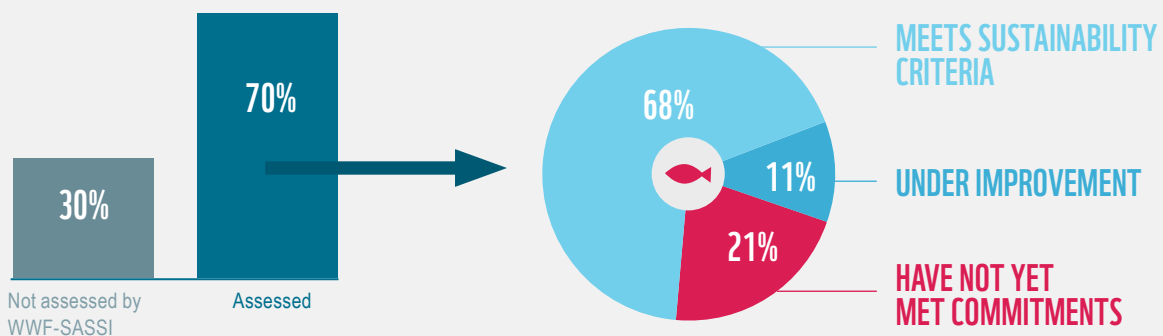
Roberto Gastaldi, Head – Seafood, Food Lovers Market

PROGRESS BY SPECIES

2020



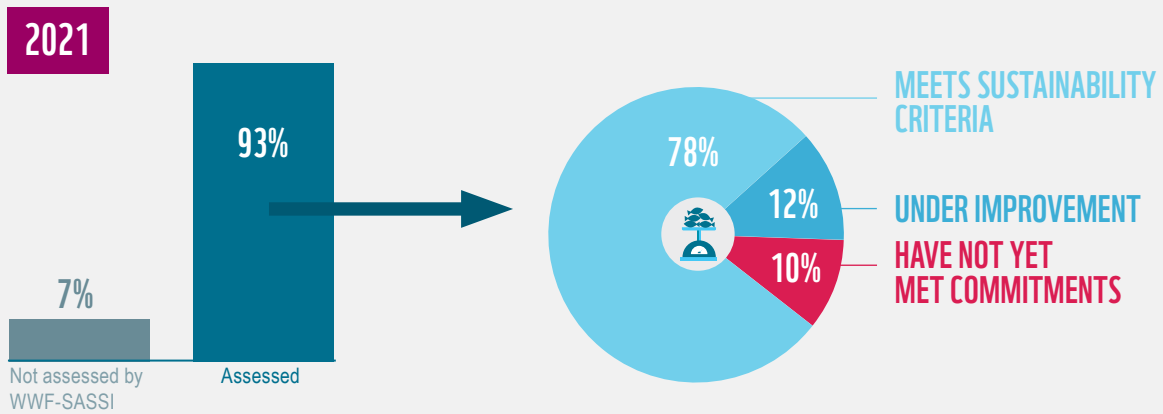
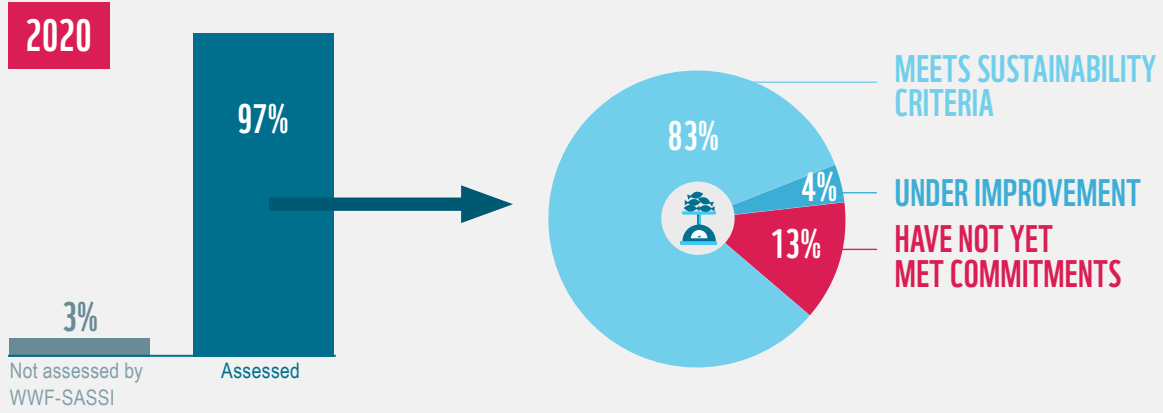
2021



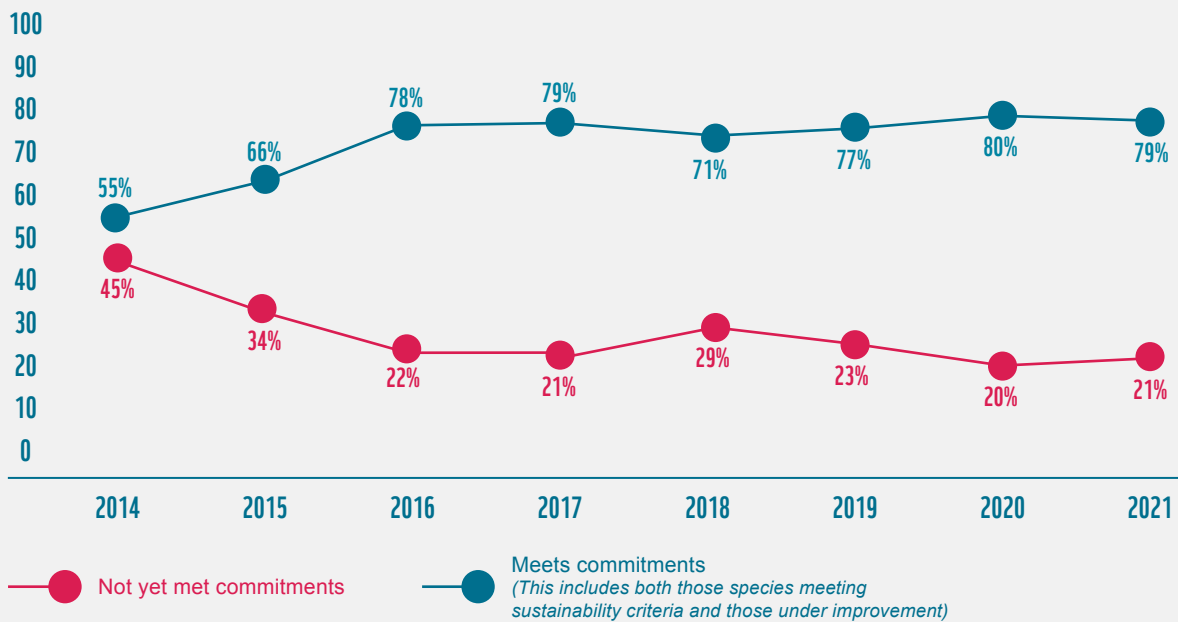
Revised strategies: foodloversmarket.co.za/food-loversmarket-sustainable-seafood-progress/

Food Lover's Market FLM_SA

PROGRESS BY VOLUME



FOOD LOVER'S MARKET PROGRESS THROUGH THE YEARS (SPECIES)



WOOLWORTHS



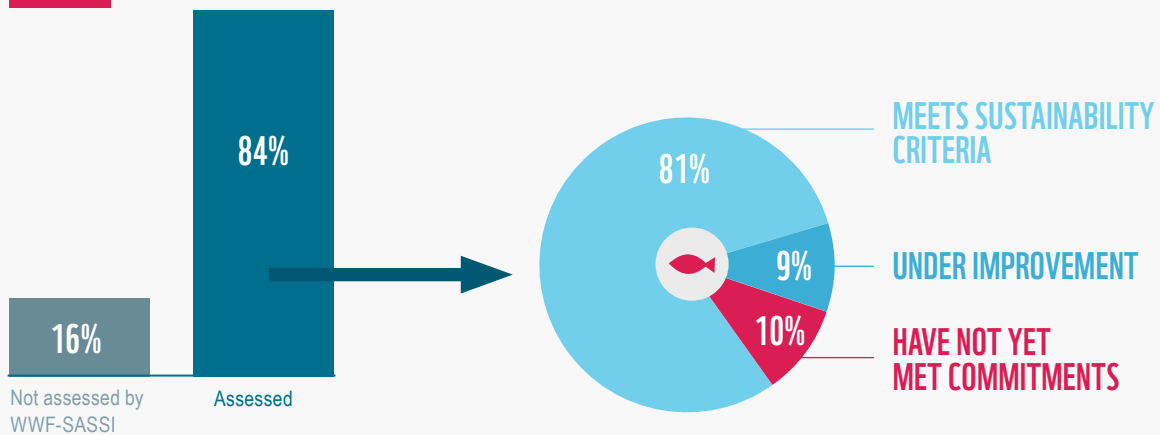
WOOLWORTHS

“Within a global food system context, seafood is a climate smart food choice and seafood companies continue to target emissions reductions throughout their value chain. The impacts of climate change, including ocean acidification, are, however, likely to disrupt seafood supply chains in the coming years. Through our Good Business Journey and Fishing for the Future programmes we are taking action to implement adaptation strategies and strengthen climate resilience across our seafood supply base.”

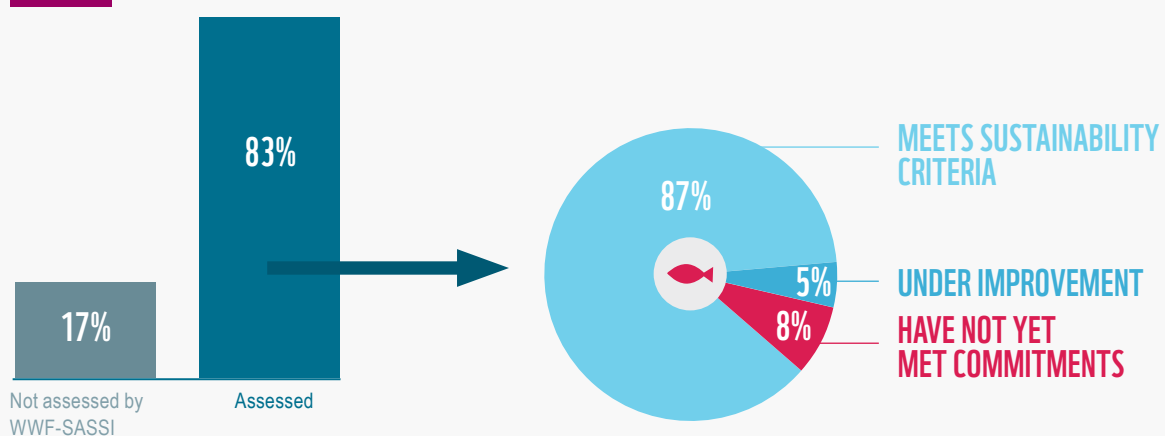
Gert le Roux, Aquaculture and Fisheries Specialist, Woolworths

PROGRESS BY SPECIES

2020



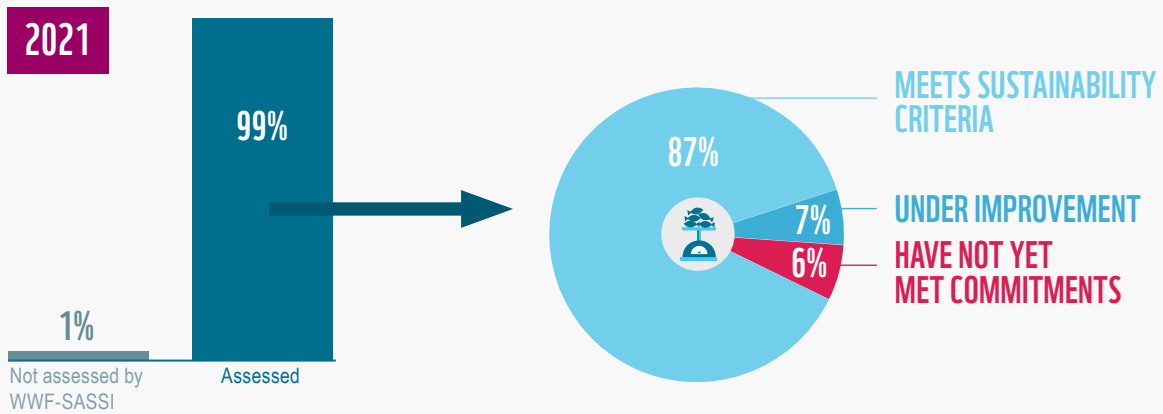
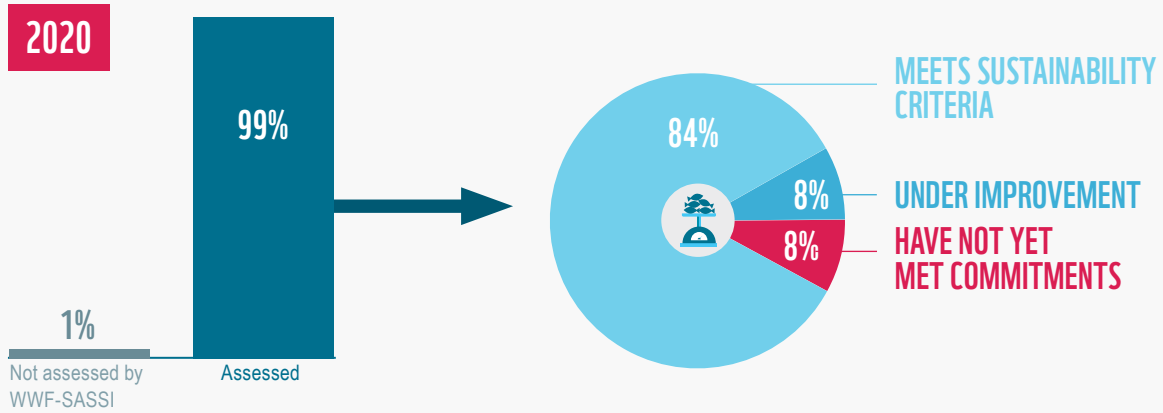
2021



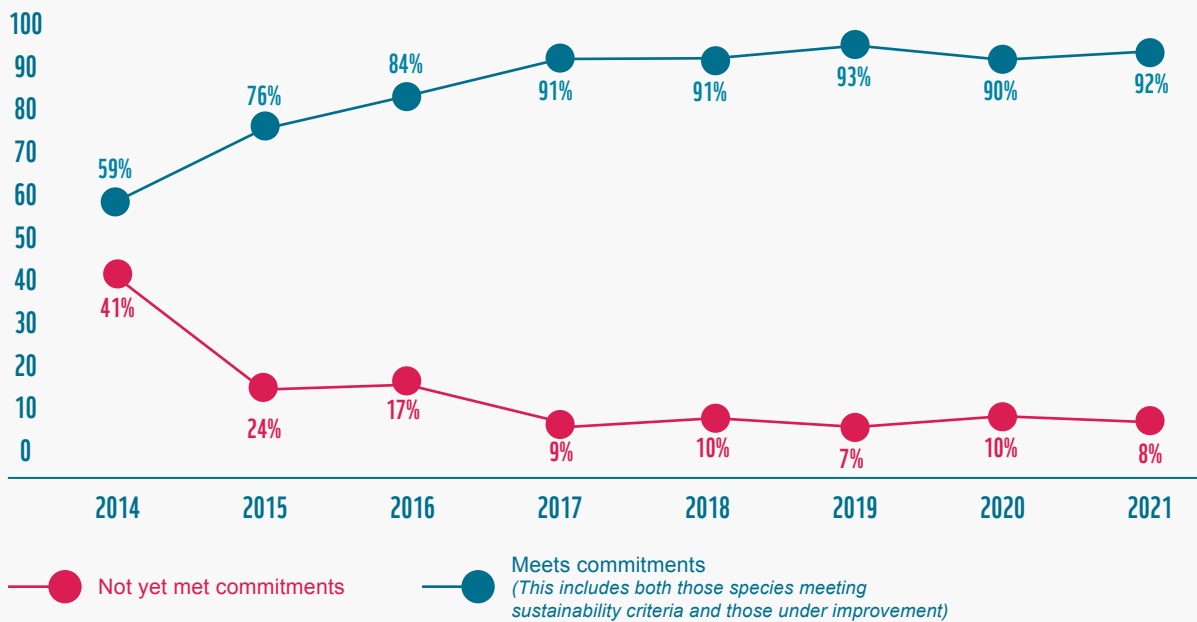
Revised strategies: www.woolworths.co.za/goodbusinessjourney

WoolworthsSA WoolworthsGBJ

PROGRESS BY VOLUME



WOOLWORTHS PROGRESS THROUGH THE YEARS (SPECIES)



THE SPAR GROUP LIMITED

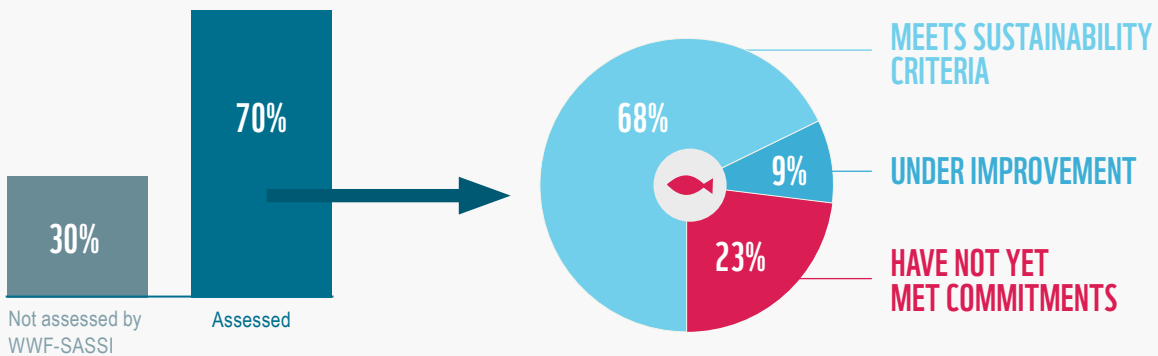


“We continue to increase the traceability and transparency of our supply chain in line with our sustainable procurement policy, ensuring robust reporting. Through our work with WWF-SASSI we saw an increase in the number of species meeting our sustainability criteria between 2020 and 2021. We continue to work closely with WWF-SASSI and stakeholders across our supply chain to protect our marine ecosystems and provide our consumers with affordable and nutritious food.”

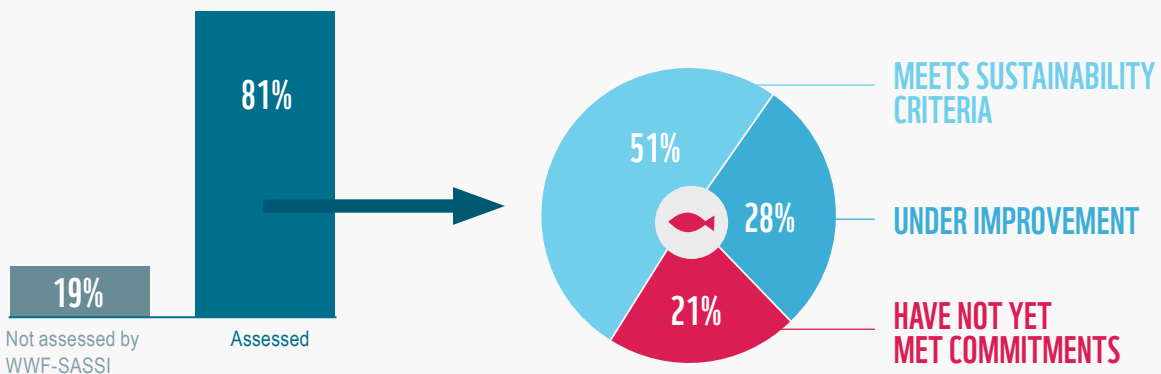
James Lonsdale, Group Sustainability Manager, The SPAR Group Ltd

PROGRESS BY SPECIES

2020

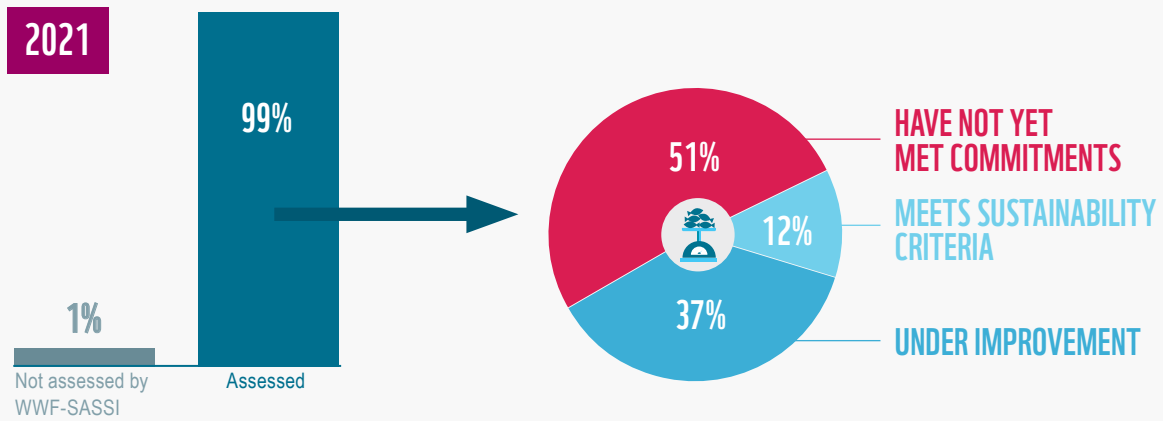
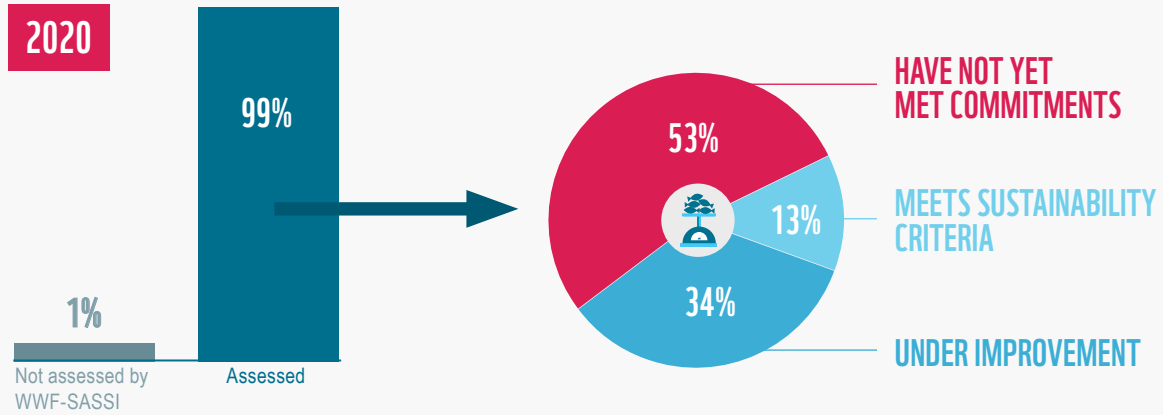


2021

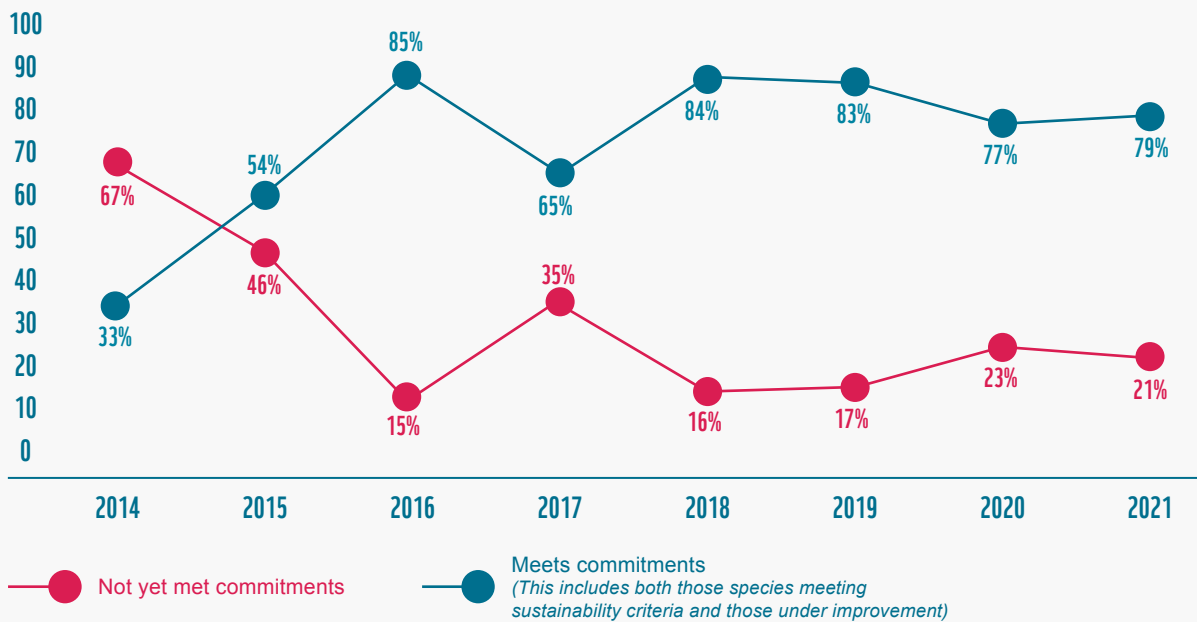


Revised strategies: www.spar.co.za/Lifestyle/View/SPAR-Cares/Sustainable-Seafood-from-SPAR myspar my_spar

PROGRESS BY VOLUME



THE SPAR GROUP LTD PROGRESS THROUGH THE YEARS (SPECIES)



OCEAN BASKET

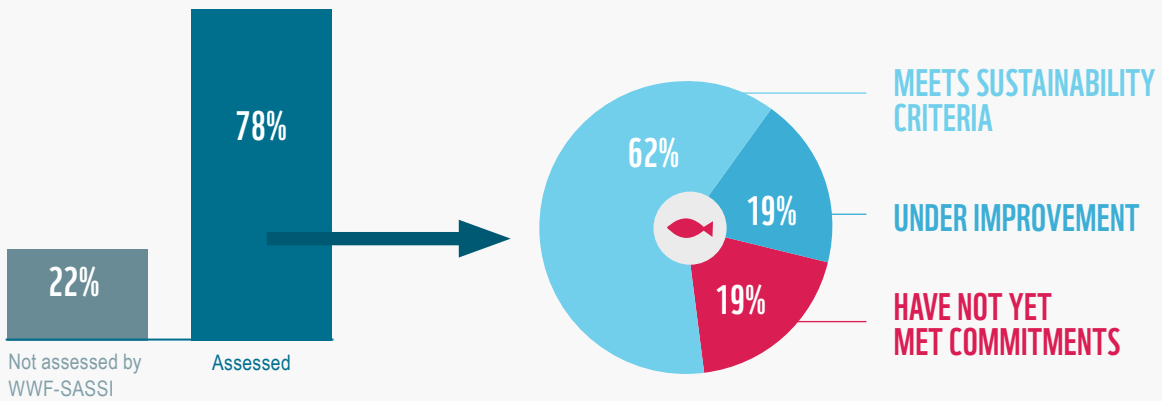


“The Ocean Basket story began in South Africa in 1995 with their first restaurant in Menlyn Park, Pretoria. The brand has since grown to a globally recognized seafood restaurant with over 200 restaurants in 16 countries. The brand is committed to sustainability through its Responsible Ocean Citizens program which focuses on shared accountability around the right to benefit from the ocean’s resources and the duty to conserve it for future generations. Part of this program sees the introduction of MSC certified species, notably Boston Calamari and Ling as an alternative to South African Kingklip. Ocean Basket has also begun strengthening its aquaculture portfolio by introducing the popular sustainably farmed Sea Bream.”

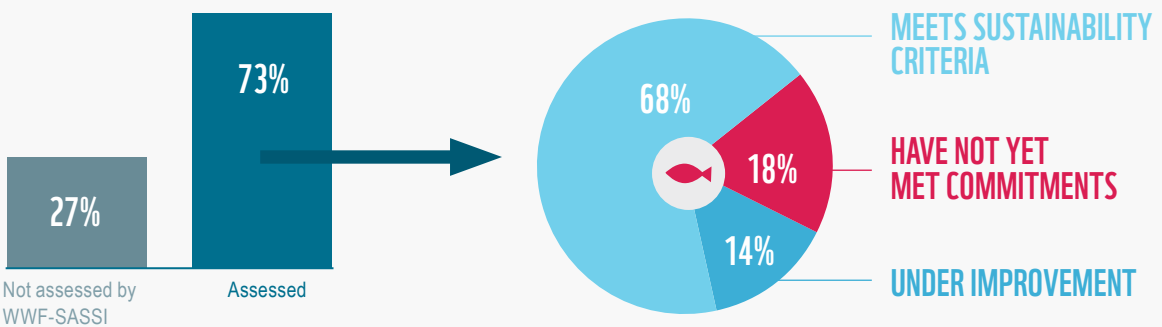
Marco Coelho, Group Supply Chain and Procurement, Ocean Basket

PROGRESS BY SPECIES

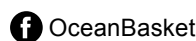
2020



2021



Revised strategies: oceanbasket.com/responsible_ocean_citizens

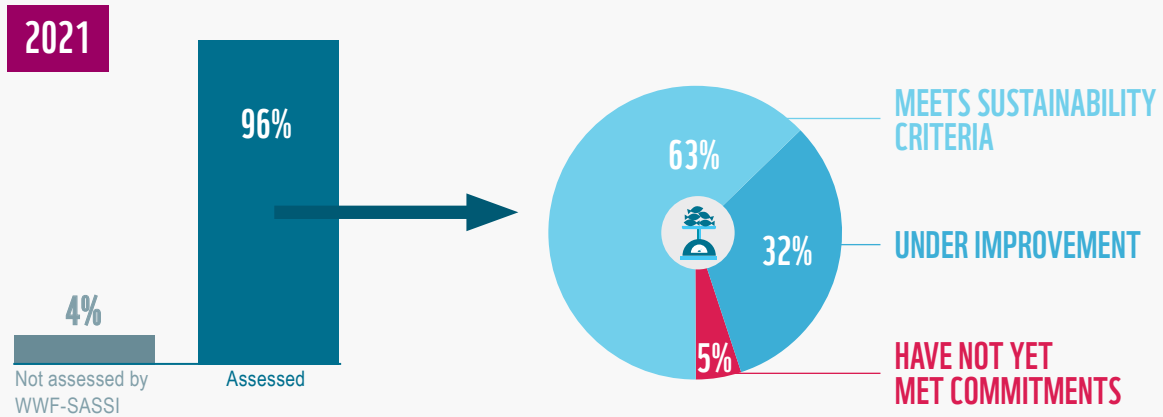
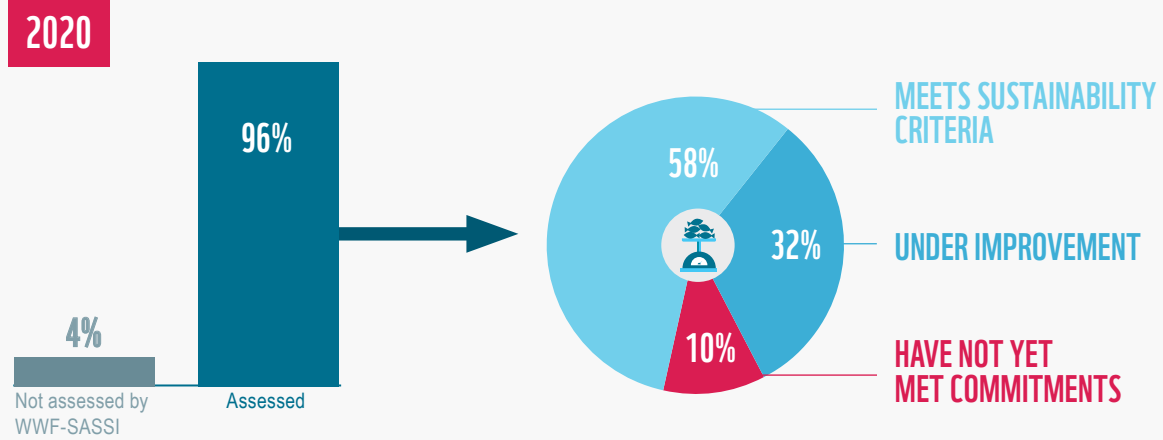


OceanBasket

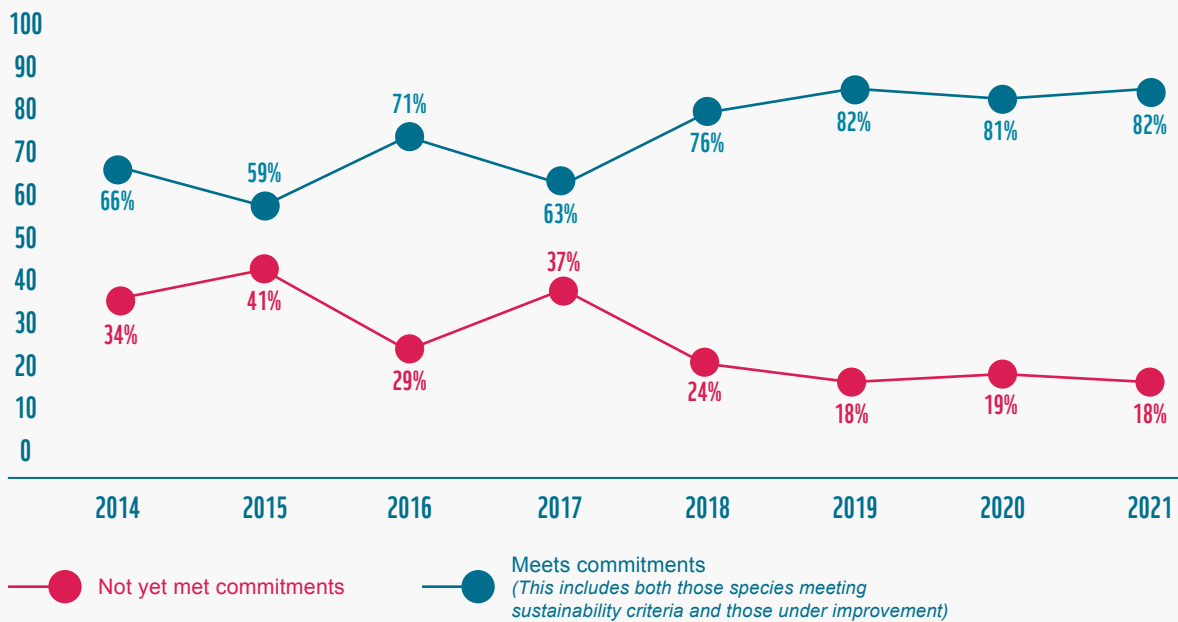


TheOceanBasket

PROGRESS BY VOLUME



OCEAN BASKET PROGRESS THROUGH THE YEARS (SPECIES)



SHOPRITE HOLDINGS GROUP

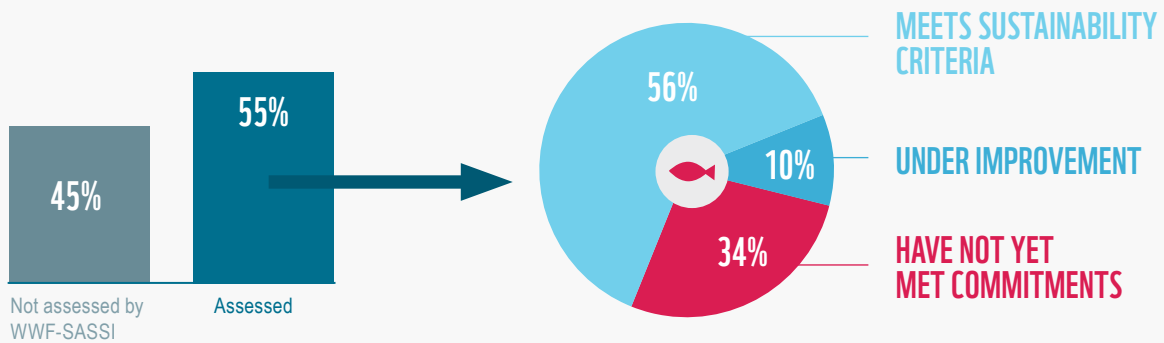
“The Shoprite Group’s partnership with the WWF’s Southern African Sustainable Seafood Initiative (SASSI) promotes the sustainable procurement and consumption of seafood. It informs our approach to sustainable seafood and we remain committed to SASSI’s voluntary compliance framework for procuring seafood products. In the year under review, we expanded sustainable fisheries training to our local fishery suppliers to ensure that our local supply chain is aware of and understands sustainable seafood practices. Together with WWF, we provided sustainable fisheries training to 96% of our local fishery suppliers.”

Sanjeev Raghubir, Group Sustainability Manager, Shoprite Holdings Group

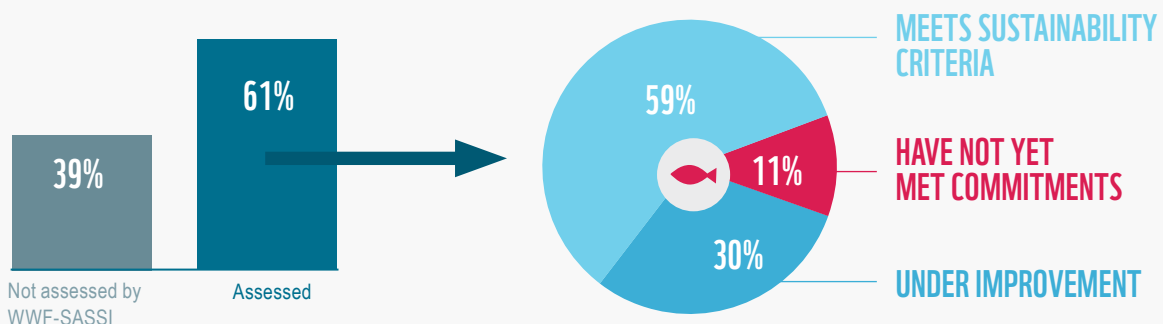


PROGRESS BY SPECIES

2020



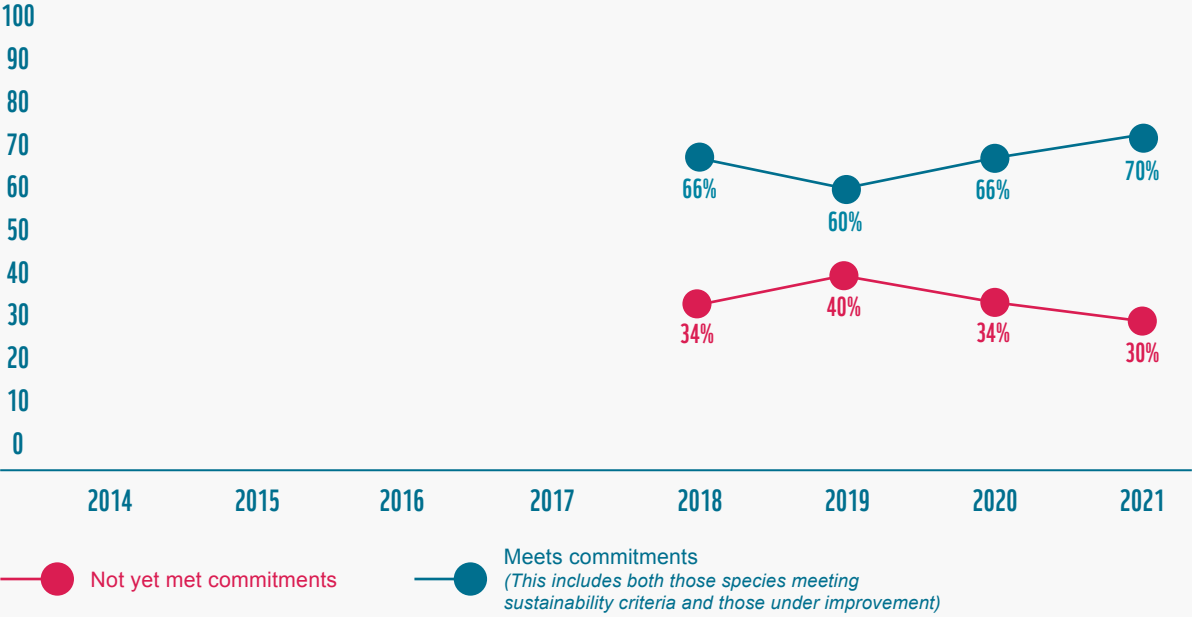
2021



PROGRESS BY VOLUME

Shoprite Holdings Group's volume information was not available.

SHOPRITE HOLDINGS GROUP PROGRESS THROUGH THE YEARS (SPECIES)



ATLANTIS FOOD GROUP

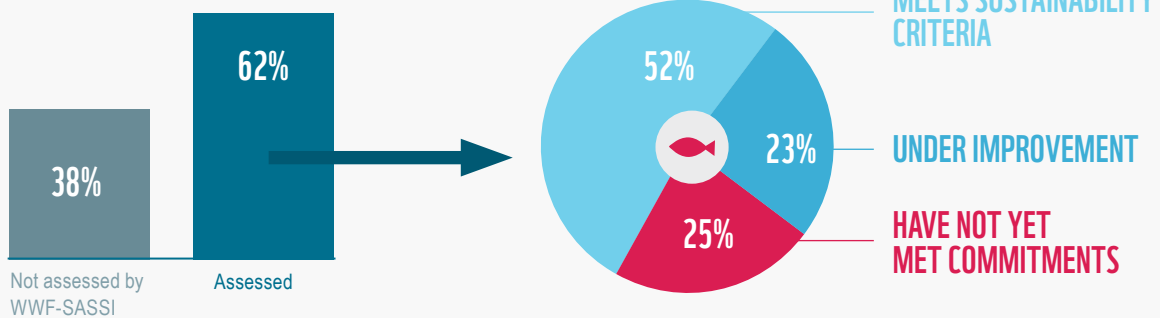


“Changes in fish stocks necessitate changes in how we manage sustainable fishing and procurement practices. Through our continual collaboration with WWF-SASSI, our partnership with MSC and ASC, and our partner factories’ MSC and ASC certification, we continue to strive to make positive choices. Atlantis Foods Group is committed to continue our sustainable seafood initiatives and practices.”

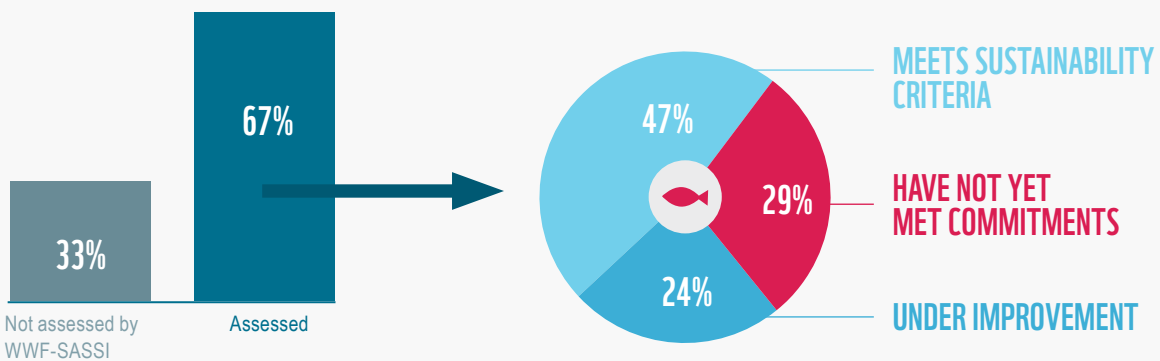
Vincent Lederle, Atlantis Food Group

PROGRESS BY SPECIES

2020



2021



Revised strategies: <https://atlantisfoods.co.za/>



AtlantisFoodsGroup

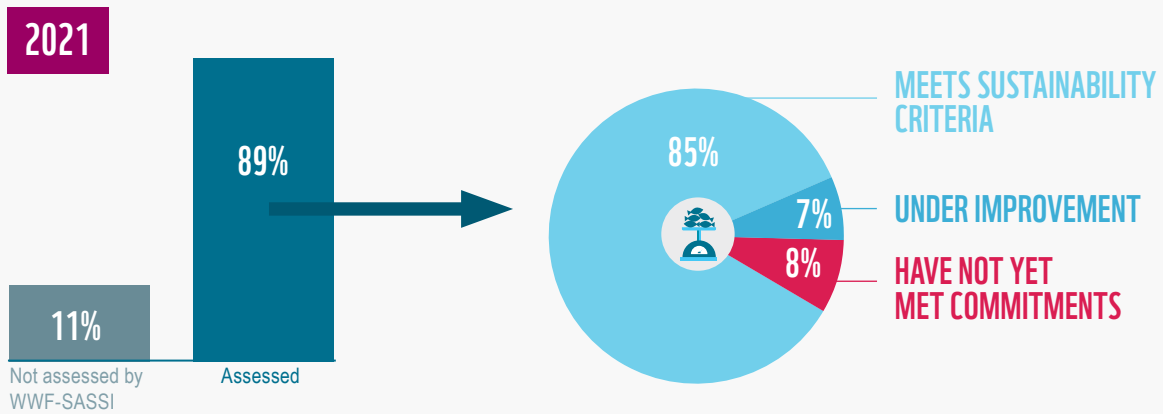
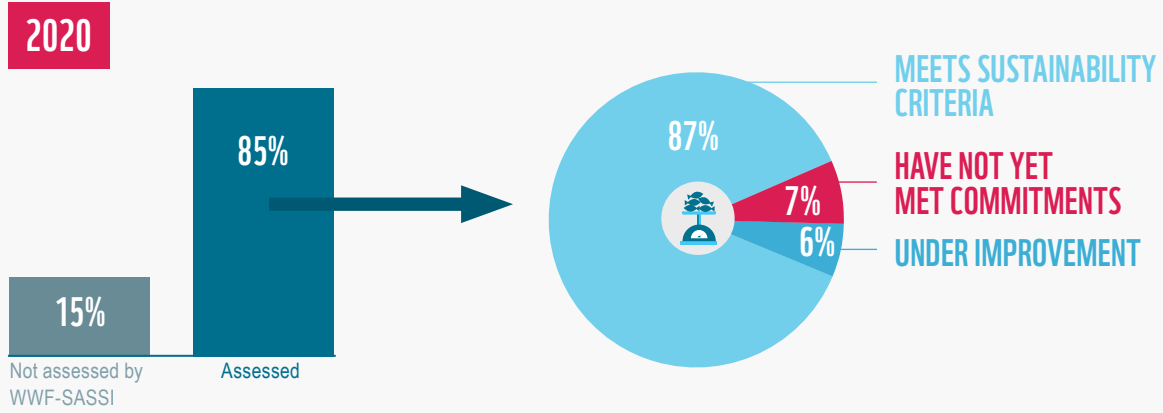


atlantisfoodsgroup

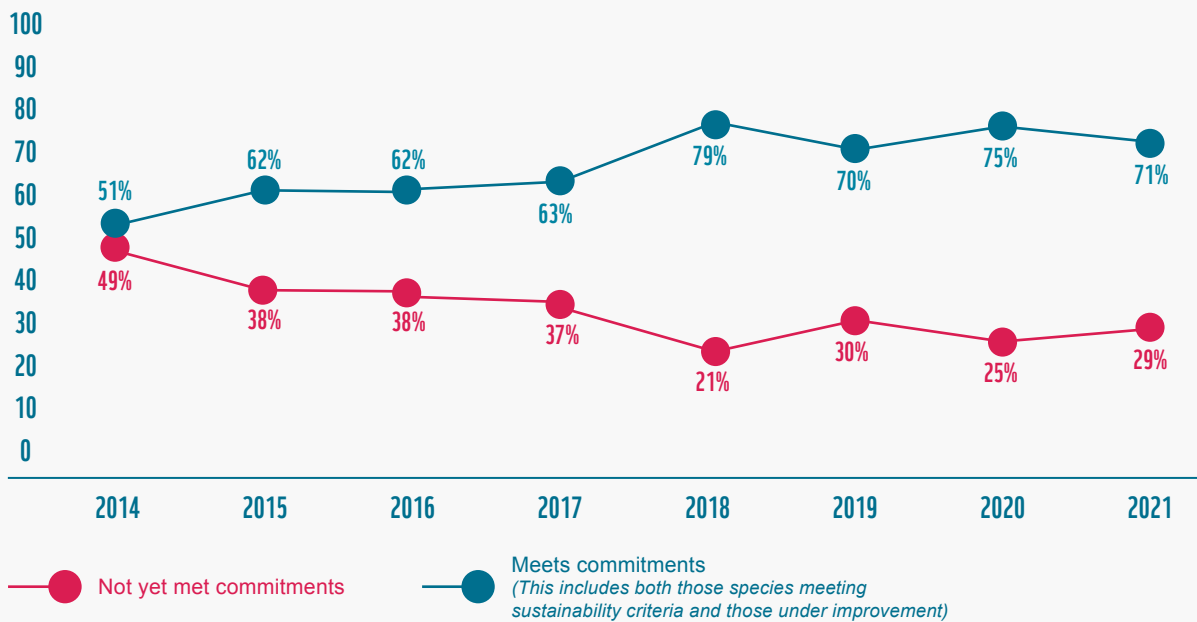


atlantis-foods-group

PROGRESS BY VOLUME



ATLANTIS FOOD GROUP PROGRESS THROUGH 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.

While it is vital to enable positive change within the seafood value chain at a sourcing, supplying, and selling level, it is equally important to continue educating – and inspiring seafood consumers to make sustainable seafood choices. This was and continues to be – a key ambition of WWF-SASSI since it started in 2004. In the last couple of years, there has been a growing awareness around seafood procurement issues such as traceability and labelling of species, with consumers more interested – and invested – in knowing where their food comes from and what impact it has on the ocean.



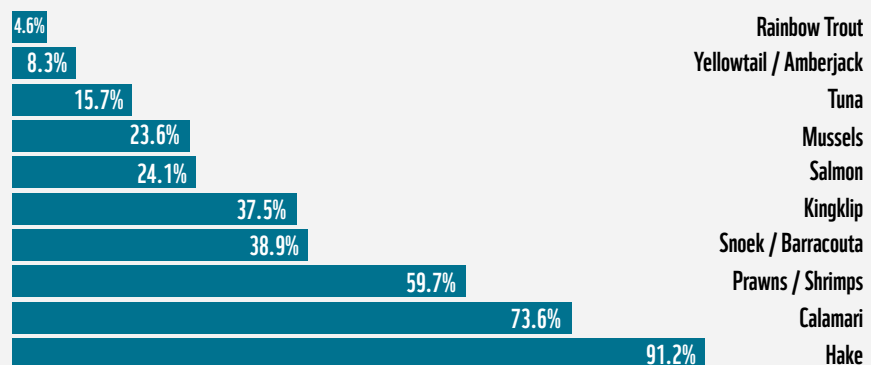
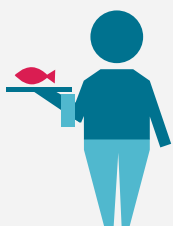
Global fish consumption has more than doubled from 9kg in 1961 to 20,5kg (per capita) in 2018.

In per capita terms and using a “live-weight equivalent”, global fish consumption more than doubled from 9 kg in 1961 to 20,5 kg in 2018 (FAO, 2018). This increase in consumption has been driven not only by growth in the global population and an increased demand for seafood, but a combination of many factors. These include technological developments in improved harvesting hence greater availability and accessibility to seafood, rising household income worldwide, shifts in diets due to aspirational wants and increased awareness of the health benefits of protein-rich seafood. Whether it is due to health reasons, social status, a rising middle class or increased access, seafood is now more popular than ever before.

MOST POPULAR SEAFOOD ITEMS IN SOUTH AFRICAN RESTAURANTS

A 2021 restaurant market analysis study by WWF-SASSI found that the top seafood items consumed at South African restaurants are hake, calamari, prawns and snoek, followed by kingklip, salmon, tuna and mussels. The top three 2021 favourites align with the top species traded by restaurants in the past decade, namely hake (91%), calamari (74%) and prawns (60%), as described in the 2014 WWF Boat to Plate report. A key difference since the Boat to Plate study is that WWF-SASSI green-listed snoek/barracouta has overtaken orange-listed salmon as a favourite. This drop in salmon consumption may be attributable to interruptions in the supply chain due to market fluctuations and the Covid-19 pandemic.

Top seafood items consumed at South African restaurants in 2021



Source: WWF-SASSI 2021 study

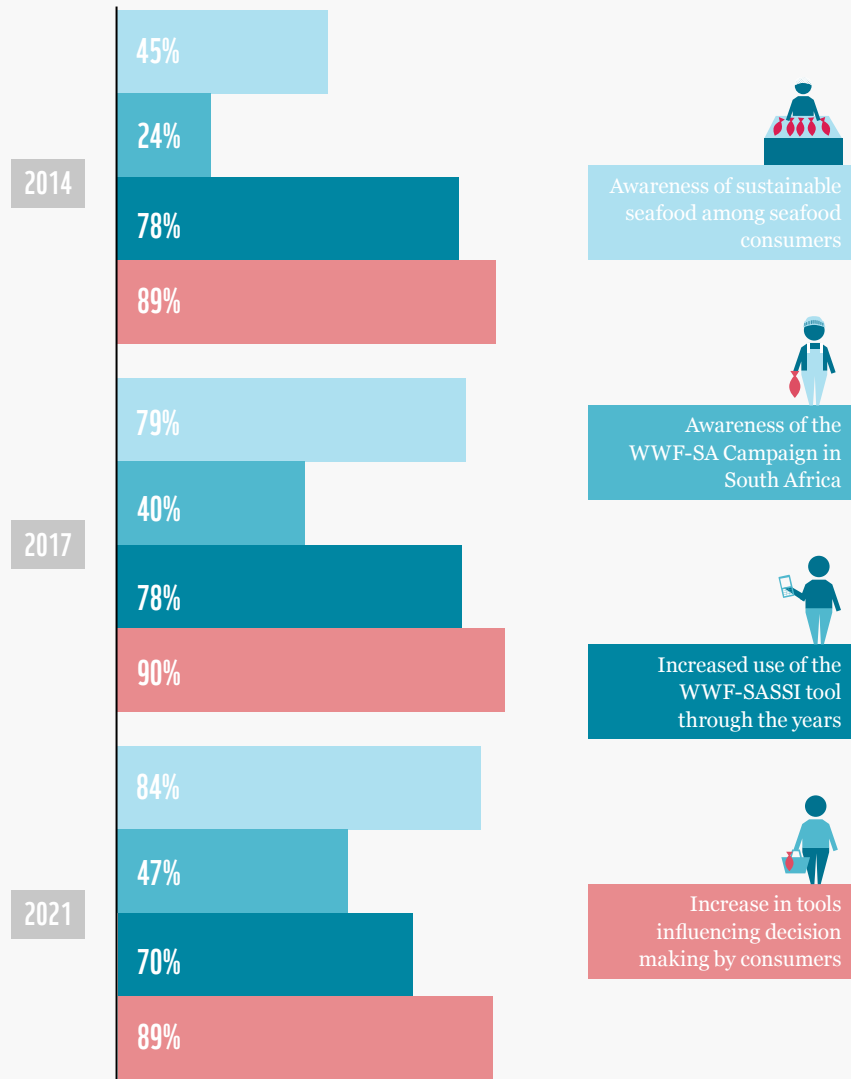
HOW CONSUMERS MAKE SEAFOOD CHOICES

Following the restaurant market analysis study in 2021, WWF-SASSI undertook a consumer market analysis in 2022, to gain insights into consumer awareness, attitudes and behaviours when making pro-environmental purchasing decisions. Comparatively over the years, there has been a marked increase in the awareness of sustainable seafood choices, the WWF-SASSI campaign and use of its associated tools among South African consumers.

AWARENESS OF SUSTAINABLE SEAFOOD, TOOL USAGE AND DECISION-MAKING LEVELS FROM WWF-SASSI NATIONAL CONSUMER SURVEYS THROUGH THE YEARS.

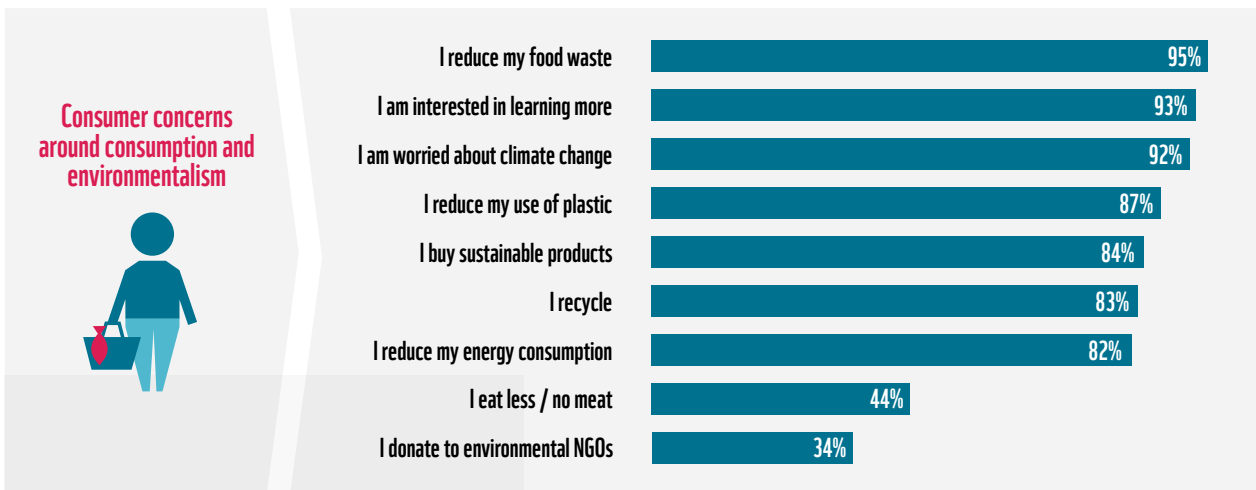
NB: years when data are available.
N = 497, 457, 729

There has been a marked increase in the awareness of sustainable seafood choices, the WWF-SASSI campaign and use of its associated tools among South African consumers.



Source: WWF-SASSI national consumer surveys 2012, 2014, 2017 & 2022

The 2022 consumer study also found that seafood consumers show high environmental consciousness, including rating climate change and wanting sustainable products more readily available as some of their main concerns when choosing seafood. This is catalysing a trend within food-service businesses to have more transparency in their supply chains, enabling the WWF-SASSI scheme participants to transform their seafood procurement approach.



Source: WWF-SASSI 2022

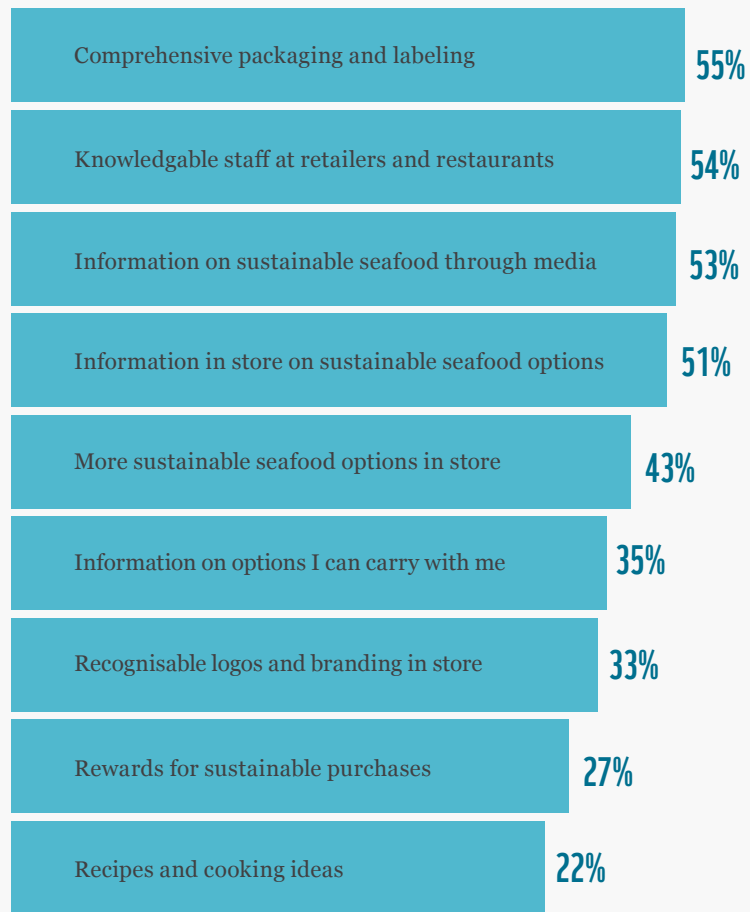
THE ROLE OF RETAILERS IN RESPONSIBLE SEAFOOD CONSUMPTION

When consumer attitudes toward marine environmentalism were surveyed, seafood consumers placed the onus on retailers to ensure that seafood on the market is harvested responsibly. Consumers are of the view that it is imperative that useful information be made available in spaces where they search for information. Therefore, retailers providing this clear information when customers are making their purchasing decisions is bound to shift behaviour. Over 50% of 729 consumers surveyed highly rated “knowledgeable staff at restaurants and retailers” as an aspect that would make it easier to choose and consume sustainable seafood. Retailers also need to focus on labelling seafood products clearly and properly while using in-store signage to help guide buyers in making better choices. The figure shows consumer-identified interventions that would make it easier to choose sustainable seafood.

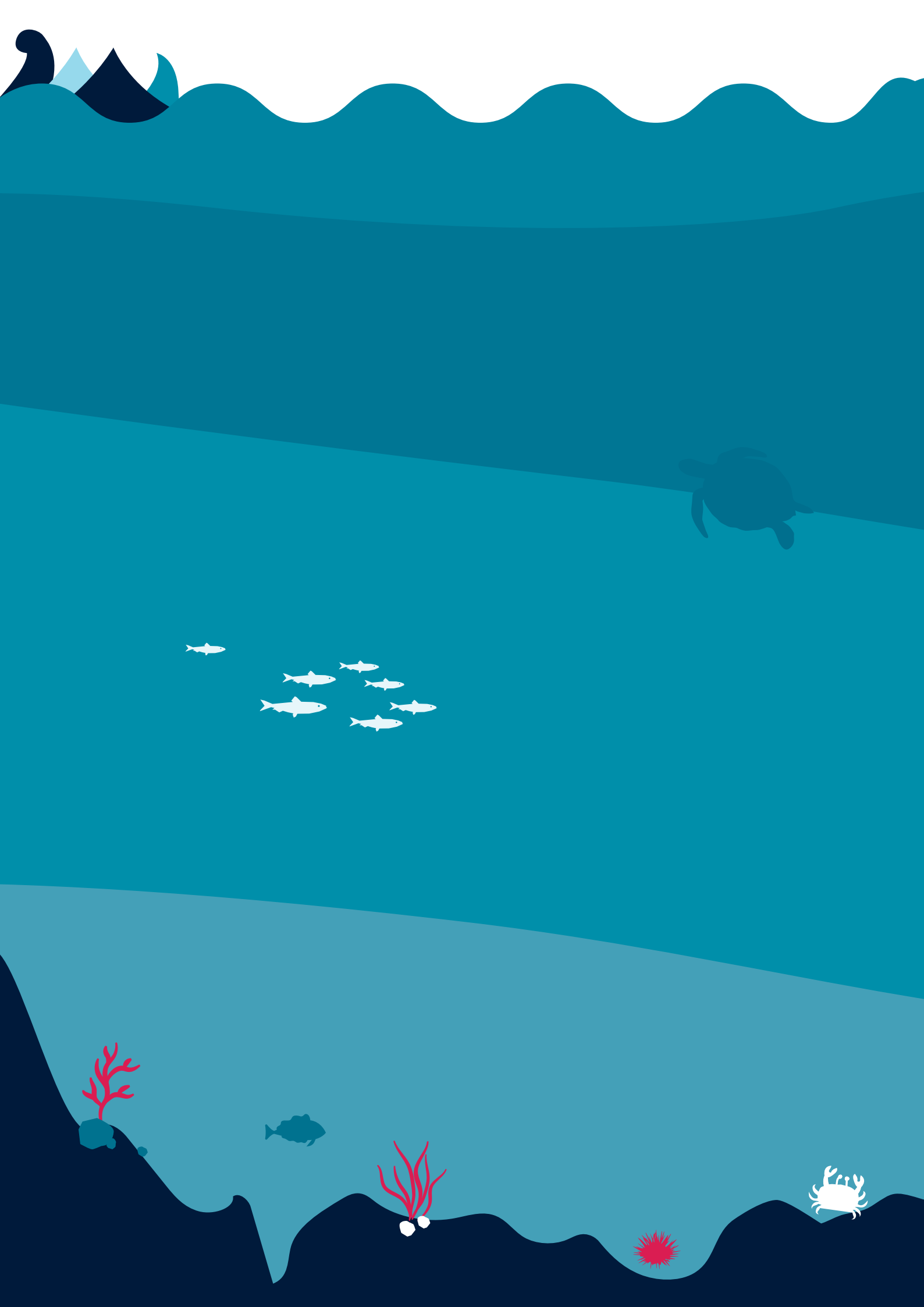
Consumers rely on retailers actively driving the transformation of the seafood supply chain to be more sustainable, including the use of comprehensive clear labelling, thereby making their purchasing decisions easier. The 2022 survey results, when it comes to top consumer choices, correlate fairly well with the species and products where the WWF-SASSI scheme participants have been focusing their efforts in terms of sustainable procurement. However, it is important to note that individual product categories (like hake or tuna) are made up of various species which are harvested using different methods and produced in different countries. Therefore, the sustainability status differs even within these categories. The scheme participants need to find ways to incentivise

transformation of the fisheries and farms where the unsustainable species are sourced from, as these may be key species in their businesses in terms of seafood volume sold. Consumers are the demand catalyst, but suppliers and retailers hold the positive power to shift what they source and sell.

Consumer actions that will enable sustainable seafood consumption



Source: WWF-SASSI 2022



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An underwater photograph of a sea turtle swimming over a vibrant coral reef. The water is clear and blue, with sunlight filtering through from above. The text is overlaid in large, white, bold, sans-serif capital letters.

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