



GLOBAL SEAFOOD MARKETS STRATEGY BRIEF 2017–2022

The ocean makes life on our planet possible. It delivers the oxygen we breathe and regulates our climate. It provides food for billions of people around the world. But the ocean that we all depend on is in danger. Increasing threats such as overfishing and climate change are putting pressure on the ocean and damaging its ability to sustain ocean life.

For half a century, the Packard Foundation has made investments to expand our understanding of the ocean and has worked with partners to improve its long-term health. Today, the Foundation's ocean investments are focused in [six countries](#) and on a suite of [global strategies](#) that together offer great potential for accelerating positive change.

The Global Seafood Markets Strategy uses the influence of the global seafood industry to promote thriving, well-managed fisheries and responsible aquaculture production that billions around the world depend on for food and jobs. The [full Strategy](#) is available on our website. This brief summarizes key elements of the Strategy.

the David
& Lucile Packard
FOUNDATION

GOALS

The Strategy focuses on fisheries and aquaculture operations that the North American, Northern European, and Japanese market demand for sustainable seafood can influence. We want to use this market influence in combination with certification, ratings, improvement programs, and policy reforms to achieve the following goals:

- » 40 percent of global fisheries are sustainable or on a path to sustainability by 2022.
- » Cultivate market demand for responsible aquaculture and support the development of innovative tools to improve aquaculture practices.

Strategic Initiative 1:

BUILD DEMAND

Maintain North American momentum for responsible seafood sourcing and catalyze the movement in Japan.

Why it matters: Seafood businesses' responsible sourcing commitments are an essential building block of our Strategy. These commitments create incentives through the seafood supply chain for fishing and aquaculture operations to improve. To date, the majority of major retailers and institutional food service companies in North America and Europe have made public commitments to sustainability and are in the process of implementing these policies.

What we fund:

- » **Deepening retail commitments** through efforts such as promoting traceability, expanding the products included within company commitments, and increasing accountability for progress.
- » **Formalizing food service commitments** by coordinating a range of strategies including precompetitive platforms to engage food service companies to develop industry norms for responsible sourcing.
- » **Developing a platform for business accountability** that promotes greater transparency about company progress toward meeting commitments.
- » **Growing NGO and private sector leadership.** Innovative leadership development programs lay the foundation for future progress by building the next generation of sustainable seafood leaders.
- » **Supporting business and NGO collaborations** that increase understanding, agreement, and collective action that are critical to the next phase of work.

Details on our [strategy to build the Japanese market for sustainable seafood](#) are available on our website.



Strategic Initiative 2:

INCENTIVIZE CHANGE

Sustainability programs meet the needs of current and emerging markets, and the range of fisheries seeking access to these markets.

Why it matters: Sustainability programs play an essential role in translating demand for sustainable seafood into change on the water. Ratings and certification standards establish a bar for defining sustainability and provide the assurance that buyers seek regarding their products. Traceability programs ensure that products sold truly come from sustainable or improving sources and support efforts to end human rights abuses.

What we fund:

- » **Creating a pathway for all fisheries and aquaculture to improve toward sustainability via coordinated certification and ratings programs.** We are supporting a collaboration of five leading certification and ratings programs to define a common spectrum of environmental and social performance for fisheries and aquaculture, as well as clarify the roles the five organizations play in helping seafood producers move along that spectrum toward sustainability.
- » **Increasing the seafood industry's engagement in human rights and labor issues** by ensuring that they are included within sustainable seafood commitments and supporting the development of tools to address these issues.
- » **Reducing market incentives for illegal, unreported, and unregulated seafood** by ensuring sustainable seafood commitments require traceability and supporting policy initiatives in focus countries.
- » **Strengthening fishery and aquaculture governance** through market-supported advocacy and capacity.
- » **Increasing seafood supply chain transparency** at every level, including encouraging retailers to disclose commitment progress, supporting a global website for tracking fishery improvement project progress, and advocating for businesses to adopt full-chain traceability.





Strategic Initiative 3:

CHANGE ON THE WATER

Fisheries and aquaculture improve their performance toward sustainability.

Why it matters: Our ultimate goal is to improve fisheries and aquaculture production and management. We support fisheries and aquaculture improvement efforts that aim to improve compliance with existing regulations, establish better management regulations and enforcement capacity where they do not exist, and incentivize the seafood industry to voluntarily act to improve its performance.

What we fund:

- » **Scaling models for fishery improvement and accelerating progress toward change on the water.** We'll focus on supporting fishery improvement projects to deliver increased outcomes, including changes in fishing practices, in management policies, and on the water.
- » **Identifying a role for the Foundation in aquaculture improvement** by promoting business commitments to responsible aquaculture in the United States and Japan and piloting support for aquaculture improvement projects within the Foundation's focus countries.

WHERE WE WORK

The Strategy focuses on using the global seafood trade to influence fisheries and aquaculture management. In addition, the Packard Foundation is working to better align the global seafood market with fishery and aquaculture priorities in six key countries – Chile, China, Indonesia, Japan, Mexico, and the United States. In these countries, the Foundation supports efforts to ensure fishing is sustainable, aquaculture is responsible, and that we protect habitats vital to marine diversity. Please [visit our website](#) for details on our individual country strategies.

LEARN MORE

For more information about the Packard Foundation's Global Seafood Markets strategy and grantmaking, [visit us online](#) or contact our team:

- Sarah Hogan, program officer (shogan@packard.org)
- George Dallas, program associate (gdallas@packard.org)