# Realizing Value:
# Tuna Sustainability Progress & Market Confidence

**ISSF 2025 Tuna Sustainability Market Forum** | November 14, 2025

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# Agenda

| TIME | SPEAKER | TOPIC |
|---|---|---|
| 9:00–9:15am | Michael Cohen (ISSF) | Welcome and Event Overview |
| 9:15–10:45am | **Session 1** | |
| | Susan Jackson (ISSF) | Driving Sustainability Progress & Supporting Market Strategic Priorities |
| | Victor Restrepo (ISSF) | Turning Science into Action: Global Tuna Progress Through ISSF Collaboration |
| | Discussion/Q&A | |
| 10:45–11:15am | Coffee Break | |
| 11:30–1:00pm | **Session 2** | |
| | Seth McCurry & Alberto Martín Aristín (MSC) | The Growth of MSC Fisheries |
| | Ian Rolmanis & Dr. Alexia Morgan (SFP) | SFP Case Study: Driving Sustainability Impact & Integrating ISSF Tools |
| | Michael Cohen (ISSF) | Activating Market Influence & Creating Strategic Value |
| | Susan Jackson (ISSF) | Closing Comments |
| | Discussion/Q&A | |
| 1:30–2:30pm | Light Lunch | |

# Welcome and Event Overview

November 14, 2025

**Michael Cohen**
ISSF Market Outreach Associate

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# Today's Presenters

**Susan Jackson**
ISSF

President, ISSF

**Dr. Victor Restrepo**
ISSF

Vice President, ISSF

**Alberto Martín Aristín**
Marine Stewardship Council

Director, MSC España y Portugal

# Today's Presenters

**Seth McCurry**
Marine Stewardship Council

Senior Commercial Manager, MSC UK & Ireland

**Ian Rolmanis**
Sustainable Fisheries Partnership

Global Markets & Industry Leadership Director

**Dr. Alexia Morgan**
Sustainable Fisheries Partnership

Ocean Wildlife Manager

**Michael Cohen**
ISSF

Market Outreach Associate

# Driving Sustainability Progress & Supporting Market Strategic Priorities

November 14, 2025

**Susan Jackson**
President

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# Driving More than a Decade of Measurable Change

**For more than fifteen years**, ISSF and its partners—scientists, seafood companies, and environmental NGOs—have **worked side-by-side to transform global tuna fisheries.**

- **Science-Led Action:** Advancing cutting-edge research and practical tools to guide management
- **Global Collaboration:** Uniting industry, governments, and NGOs across every tuna-fishing region
- **Verified Impact:** Independent audits and transparent reporting that prove real, measurable progress

This sustained commitment has turned early challenges—data gaps, weak management, and limited accountability—into today's tangible wins: healthier tuna stocks, stronger RFMO policies, market-recognized best practices, and **more than half of global tuna catch from MSC-certified fisheries.**

**Our journey shows that long-term collaboration can deliver improved sustainability.**

From Challenge to Change

# More than a Decade of Sustainable Tuna Progress

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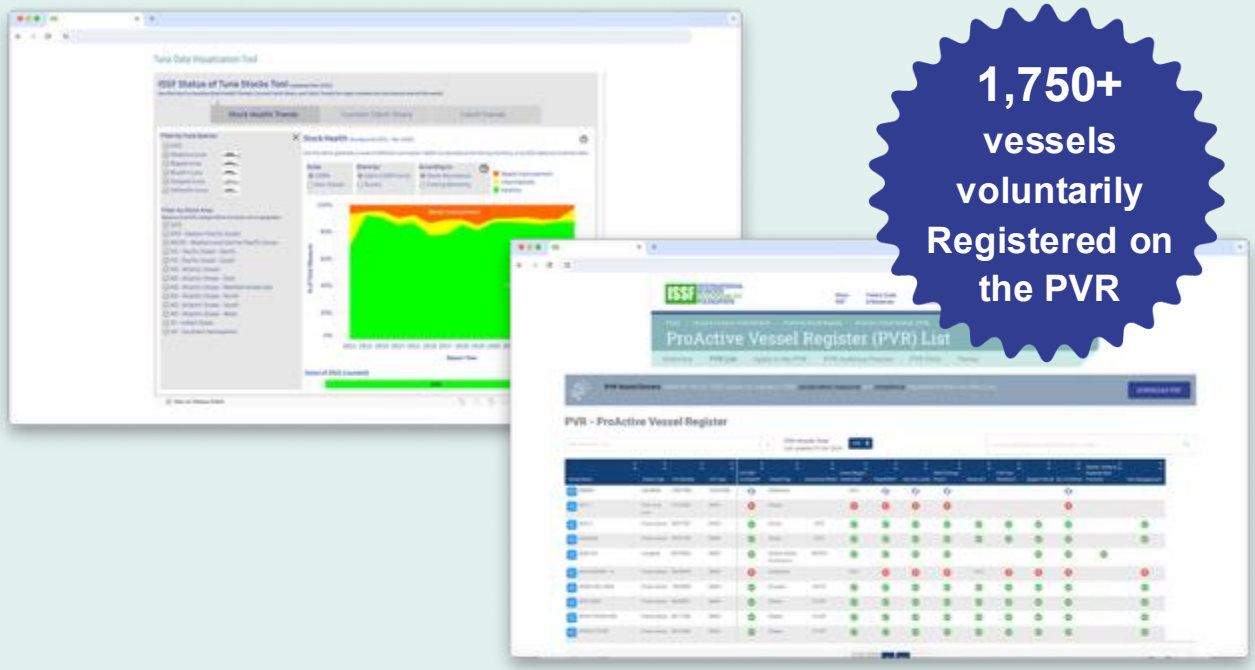
## DATA & TRANSPARENCY

**THEN:** Global tuna stock information fragmented, with no single harmonized source—minimal verifiable vessel reporting

**NOW:** Publicly available ISSF Status of the Stocks reports, vessel-level transparency through ProActive Vessel Register (PVR) and Vessels in Other Sustainability Initiatives (VOSI) platform




**1,750+ vessels voluntarily Registered on the PVR**

From Challenge to Change

# More than a Decade of Sustainable Tuna Progress

## BYCATCH & ECOSYSTEM IMPACTS

**THEN:** Sparse data on non-target species in tuna fisheries and few safeguards for sharks, sea turtles, and seabirds

**NOW:** Widespread adoption of ISSF bycatch mitigation best practices and fishing gear designs that reduce animal entanglement; RFMO-adopted shark-finning bans and seabird mitigation measures

From Challenge to Change

# More than a Decade of Sustainable Tuna Progress

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## HARVEST STRATEGIES

**THEN:** Only a handful of tuna stocks had harvest control rules

**NOW:** All 4 tropical tuna management organizations have adopted harvest strategies or interim harvest control rules for key species like skipjack and yellowfin, with implementation timelines for others

From Challenge to Change

# More than a Decade of Sustainable Tuna Progress

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

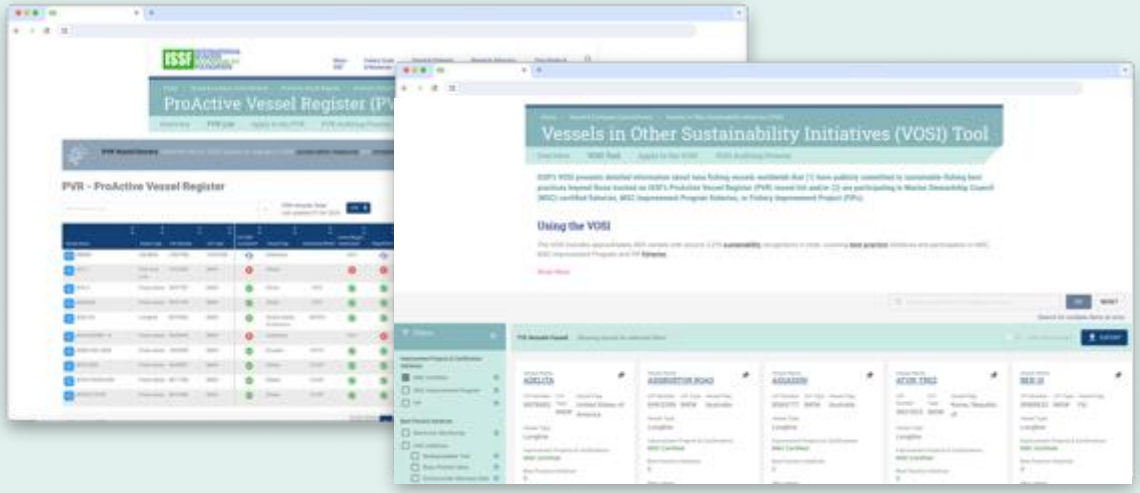
## INDUSTRY & MARKET ENGAGEMENT

**THEN:** Inconsistent industry engagement and transparency

**NOW:** ISSF participating companies undergo independent, publicly reported audits and use tools like the PVR and VOSI to demonstrate best practice commitments

**THEN:** Retail expectations for demonstrable sustainability just beginning to take shape

**NOW:** Globally, 73 major retailers reference ISSF participation and PVR/VOSI listings in sourcing policies, helping companies de-risk investments



From Challenge to Change

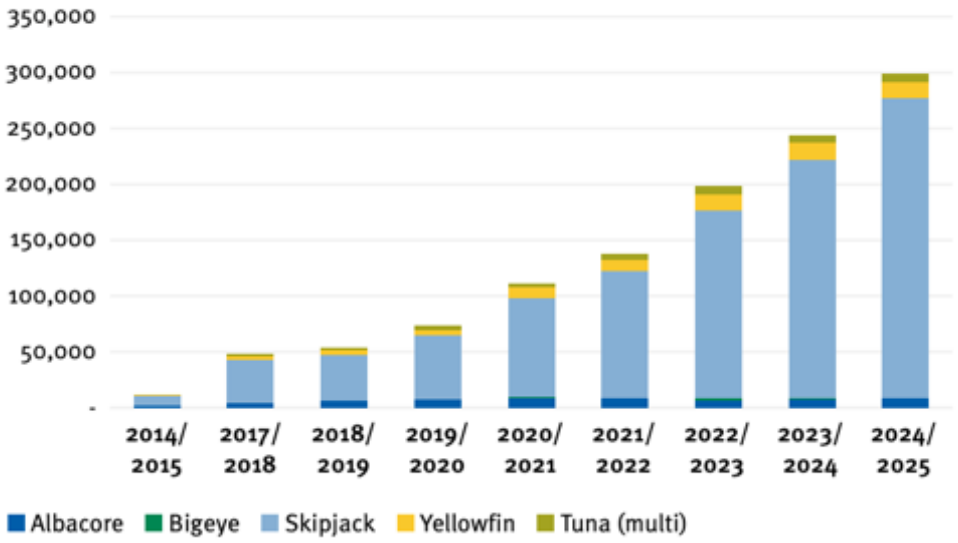
# More than a Decade of Sustainable Tuna Progress

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## MARINE STEWARDSHIP COUNCIL-CERTIFIED TUNA CATCH

**THEN:** 14% of the world's annual tuna catch came from Marine Stewardship Council (MSC)-certified catch

**NOW:** 55% of the world's annual tuna catch comes from MSC-certified fisheries





*Source:* Marine Stewardship Council, June 2025

# How Did We Get Here?

*The ISSF Approach*

The ISSF Approach

# Science-Led Innovation • Global Influence • Implementation Integrity

## ABOUT ISSF

In 2009, acclaimed scientists, leaders in industry, and environmental champions launched the International Seafood Sustainability Foundation (ISSF) based on shared concerns about the future of tuna fisheries and a desire to do something about it — together.

## ISSF MISSION

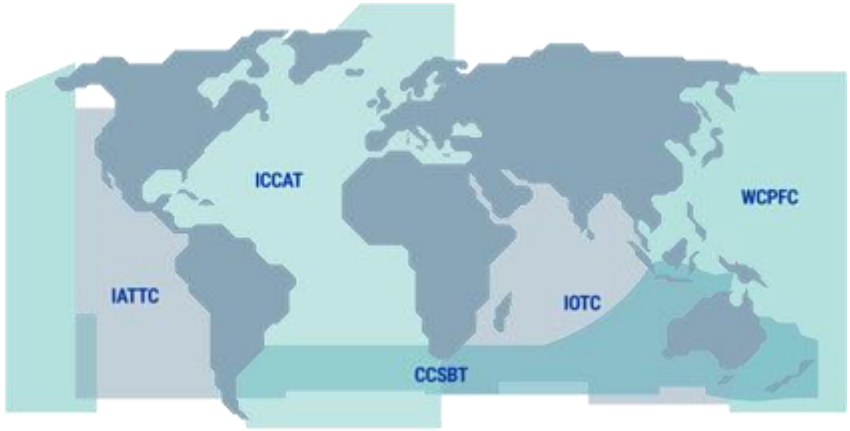
To undertake and facilitate science-based initiatives to continuously improve the sustainability of global tuna fisheries and the health of the ecosystems that support them.

## ISSF OBJECTIVE

To continuously improve the sustainability of global tuna fisheries and the ecosystems that support them to result in those fisheries meeting and maintaining the MSC certification standard.

**We achieve this through:**

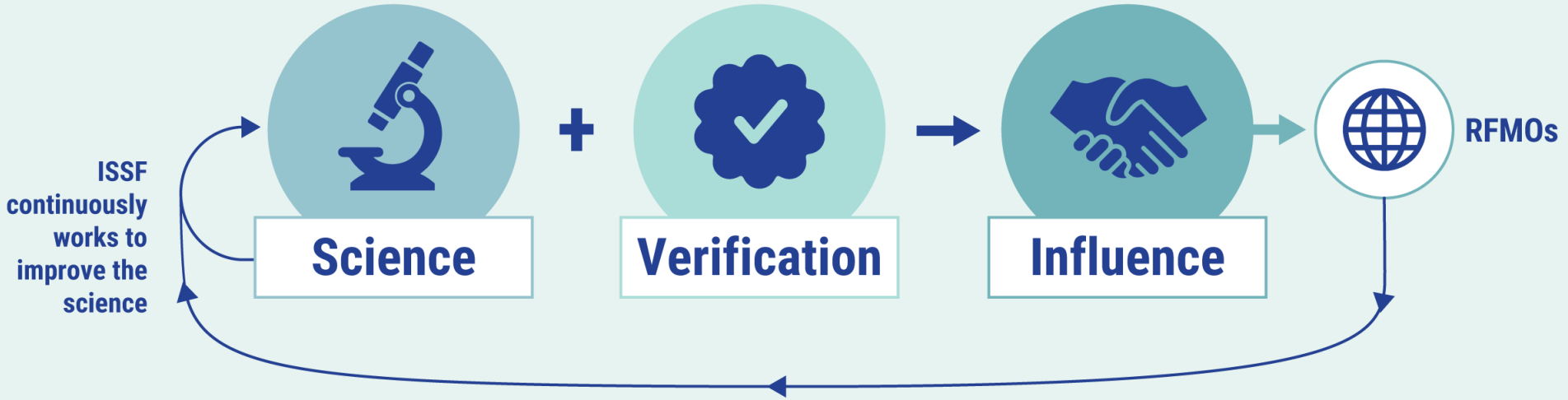
- **The development and implementation of verifiable, science-based practices, measurable commitments, and conservation management measures by participating companies**
- **Advocacy to tuna RFMOs**




**RFMOs:** Regional Fisheries Management Organizations
**IATTC**: Inter-American Tropical Tuna Commission
**ICCAT:** International Commission for the Conservation of Atlantic Tunas
**IOTC:** Indian Ocean Tuna Commission
**WCPFC:** Western and Central Pacific Fisheries Commission
**CCSBT:** Commission for the Conservation of Southern Bluefin Tuna

# ISSF Theory of Change

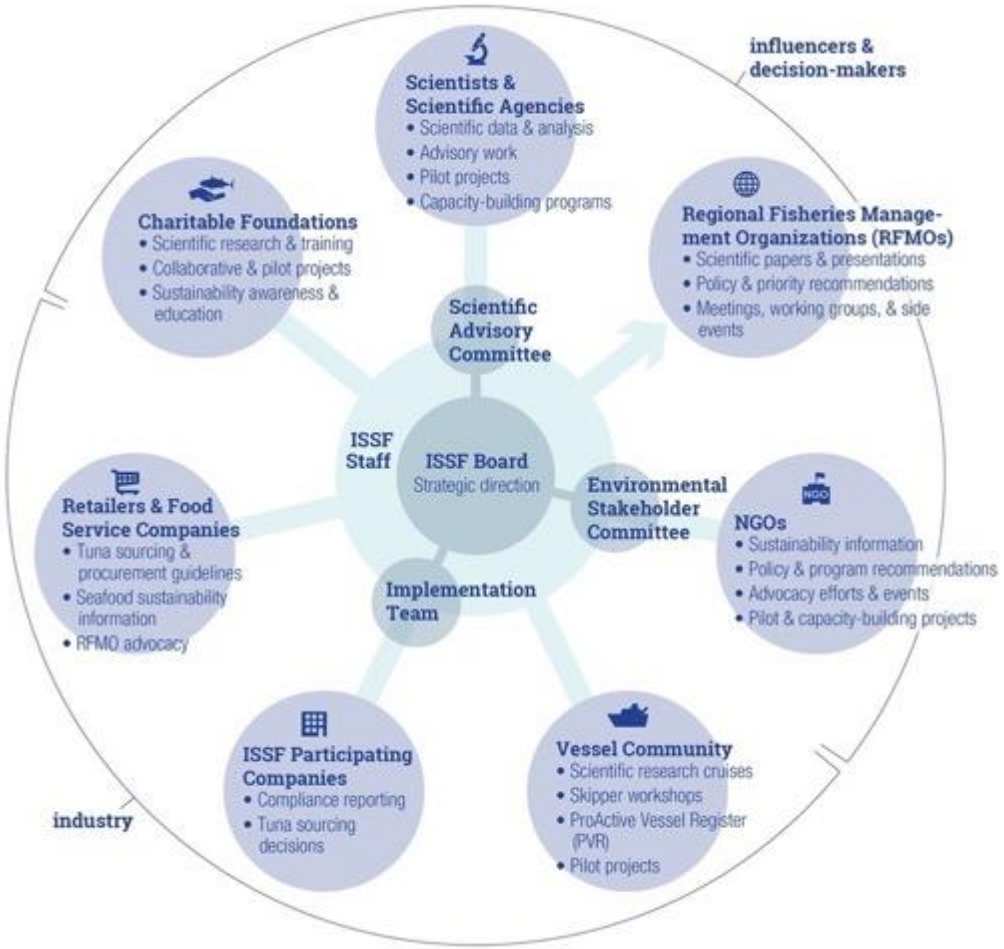
## Sustainable Management Requires Continuous Improvement




- ISSF advocacy to RFMOs is grounded in what the best current science requires.
- Simultaneously, ISSF continuously works to improve the science.
- **The intended result of our efforts is the adoption & implementation of science-based management measures by industry and RFMOs.**
- We recognize that comprehensive and sustainable management requires continuous improvement.

# ISSF Theory of Change

## ISSF ECOSYSTEM & ISSF BOARD OF DIRECTORS




**Tony Lazazzara**
Board Chair

Chair, ISSF Board of Directors / Group Director of Global Fish Procurement, Thai Union Group

**Dr. Andrew Rosenberg**
Board Vice Chair

Vice Chair, ISSF Board of Directors / Marine Scientist & Environmental and Science Policy Expert

**Susan Jackson**
President, ISSF

**Javier Garat**
Secretary General, Spanish Fishing Confederation, Cepesca

**William Gibbons-Fly**
Executive Director, American Tunaboat Association (ATA)

**Ben Gilmer**
Chair, ISSF Environmental Stakeholder Committee / Director, Large-Scale Fisheries, The Nature Conservancy (TNC)

**Ichiro Nomura**
Fisheries Policy Advisor, Ministry of Marine Affairs and Fisheries, Republic of Indonesia

**Dr. Victor Restrepo**
Vice President – Science, ISSF / Chair, Scientific Advisory Committee

# Mobilizing FUNDS Toward Sustainable Fisheries

## OUR IMPACT IN NUMBERS

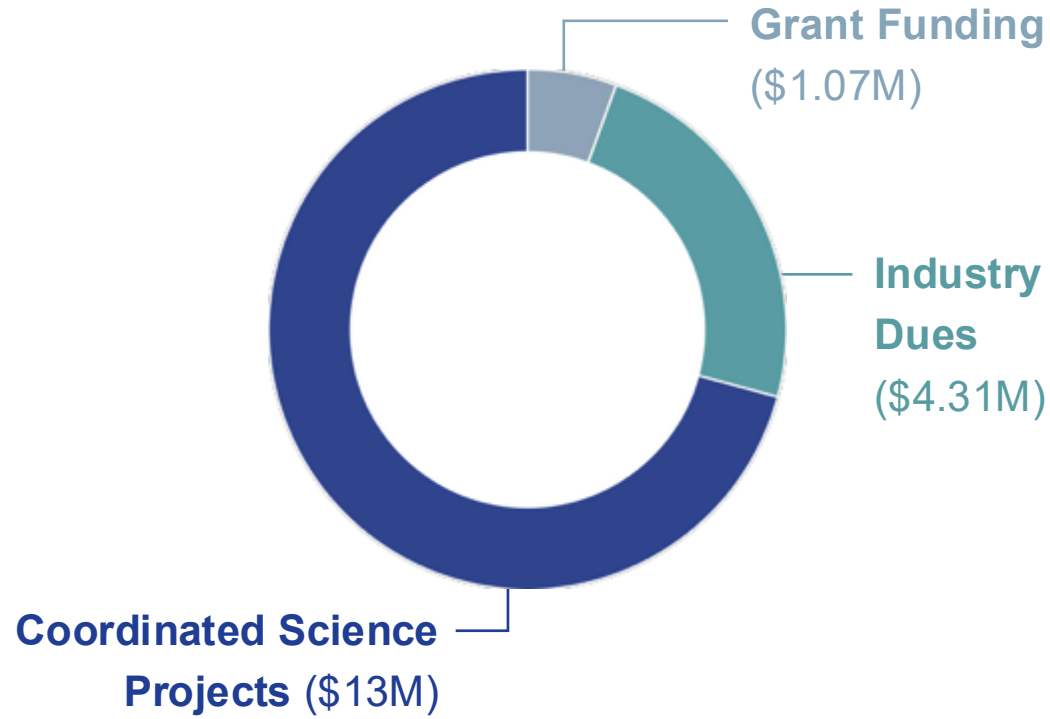
Over our history, ISSF

**PARTICIPATING COMPANIES have invested more than $58 MILLION** in ISSF's work

Does not include contributions in the form of vessel time and equipment that enable ISSF tuna fisheries research—**an amount valued at over $46 million in 2024** and typically ranging from $30-100 million per year depending on the research program

## AMPLIFYING INVESTMENT IN SUSTAINABILITY

(2024 Dollars)



# Mobilizing FISHERS Toward Sustainable Fisheries

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

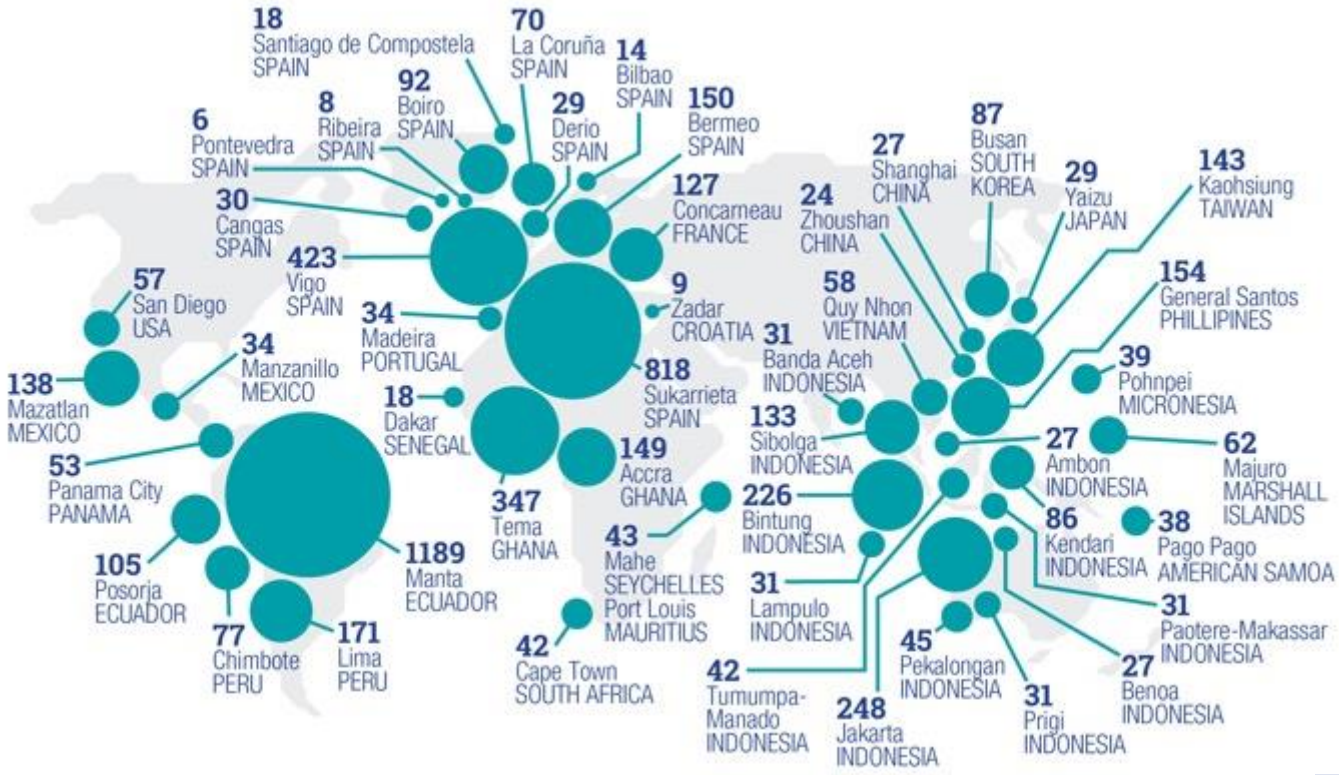
## OUR IMPACT IN NUMBERS

### ISSF SKIPPERS WORKSHOP PARTICIPANTS

By Profession (2010–June 2025)

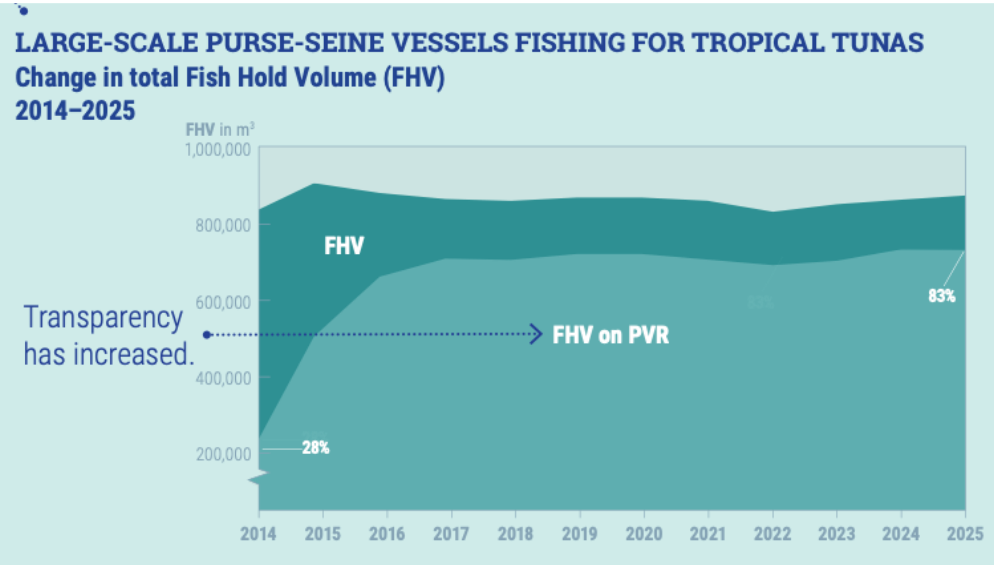

### ISSF SKIPPERS WORKSHOP ATTENDANCE

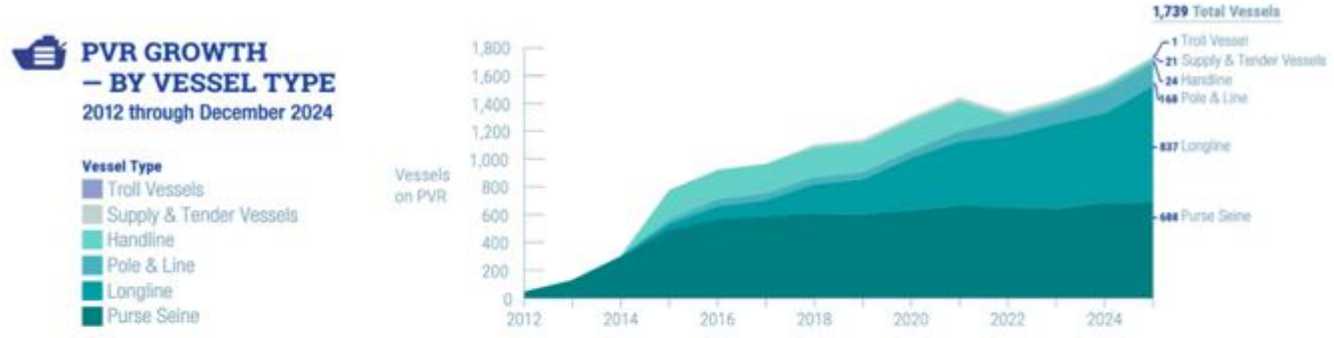
2009–June 2025

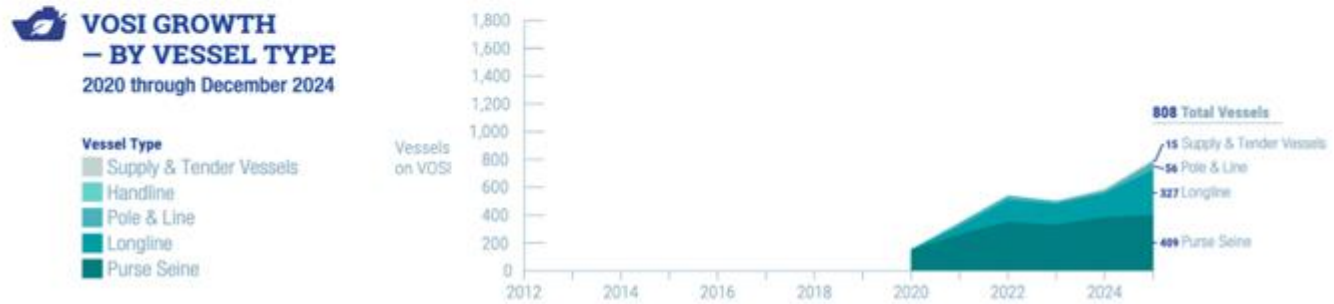


# Verified Transparency in Vessel Practices

## OUR IMPACT IN NUMBERS



# ISSF Participating Companies

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## OUR PARTNERS — INDUSTRY

### Founding Companies

BOLTON FOOD · RIO mare · Saupiquet · THE BUMBLE BEE SEAFOOD COMPANY · CLOVER LEAF · PRINCES GROUP · SeaValue · StarKist · Thai Union (Europe) · Thai Union (COSI) · TRI MARINE

### Full Companies

CMC · EVERWIN · FOOTECH · Frinsa · GENERAL TUNA CORPORATION · ISABEL · JEALSA we sea · KINGFISHER FOODS · KTCFOOD · PFG PATAYA FOOD GROUP · ATI · RS CANNERY COMPANY LIMITED · SALICA · SOUTH SEAS TUNA · POMPON ROUGE · TROPICAL

# Charitable Foundations & Other Partners Supporting ISSF

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## OUR PARTNERS — FUNDING

GORDON AND BETTY MOORE FOUNDATION

NOAA NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION U.S. DEPARTMENT OF COMMERCE

KINGFISHER FOUNDATION

the David & Lucile Packard FOUNDATION

SEARCULAR Circular Solutions for Fishing Gears

Ocean Conservancy

oceankind

FAO FIAT PANIS Food and Agriculture Organization of the United Nations

Marine Stewardship Council

# Charitable Foundations & Other Partners Supporting ISSF

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## OUR PARTNERS — RESEARCH

AZTI MEMBER OF BASQUE RESEARCH & TECHNOLOGY ALLIANCE

IRD Institut de Recherche pour le Développement FRANCE

Pacific Community Communauté du Pacifique

iotc ctoi

FAO FIAT PANIS

MARELA MARINE ELITE ANALYTICS

ICCAT CICTA CICAA

NGO TUNA Forum

CIAT IATTC

University of Hawai'i

Marine Research Centre

NOAA FISHERIES

Western & Central Pacific Fisheries Commission

Sustainable Fisheries PARTNERSHIP

CSIC

IPNLF INTERNATIONAL POLE & LINE FOUNDATION

NRF National Research Foundation | SAIAB South African Institute for Aquatic Biodiversity

WWF

HAWAI'I PACIFIC UNIVERSITY

The Nature Conservancy

**PLUS Fishing Vessel Owners & Crew**

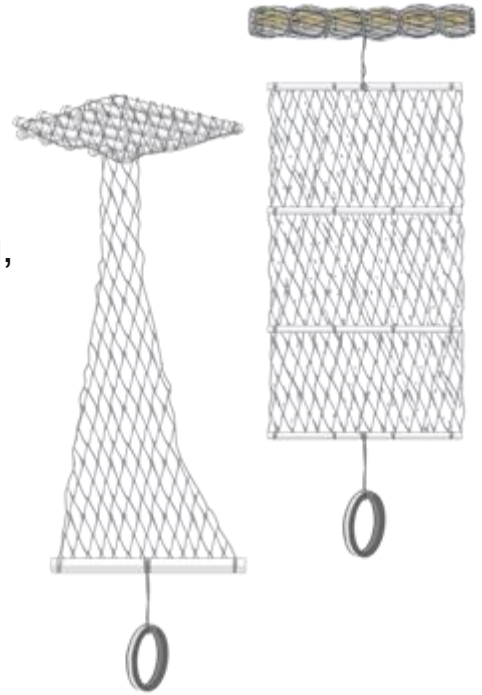
# Improved Fishing Gear Design to Minimize Ecosystem Impacts

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## SCIENCE-LED INNOVATION

### Conventional FAD

- Bulky and heavy
- Hard to build
- Results in ghost fishing, marine pollution, and damage to sea floor



### Jelly-FAD

- Light and easy to handle
- Materials available worldwide
- Easy to build and low cost

# Consistent, Coordinated Advocacy to RFMOs

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

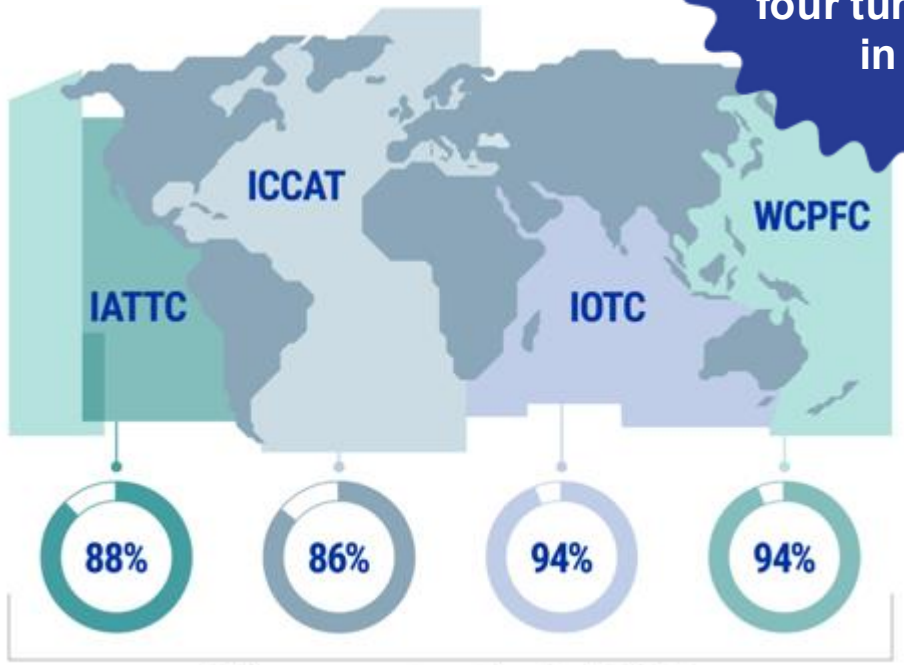
## GLOBAL INFLUENCE

**ISSF and its participating companies have driven policy change through sustained advocacy.**

- ✓ Direct meetings
- ✓ Input via national advisory committees
- ✓ Engagement with vessels, MSC clients, FIPs

**~300**
**advocacy letters delivered to RFMO delegates across four tuna regions in 2024**

**~50 NGOS were ALIGNED on OVER 90% of the ADVOCACY ISSUES**
ISSF supported in 2024



Influence saturation by RFMO

# Independent Audits • Transparent Reporting • Verified Action

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## IMPLEMENTATION INTEGRITY

**Our approach for tuna fisheries & stakeholders promotes the verifiable implementation of best practices in tuna supply chains**

- **Independent auditing** of tuna company compliance with ISSF conservation measures
- **Independent auditing** of vessel compliance with best practices

ISSF works with tuna vessels & processors **globally**

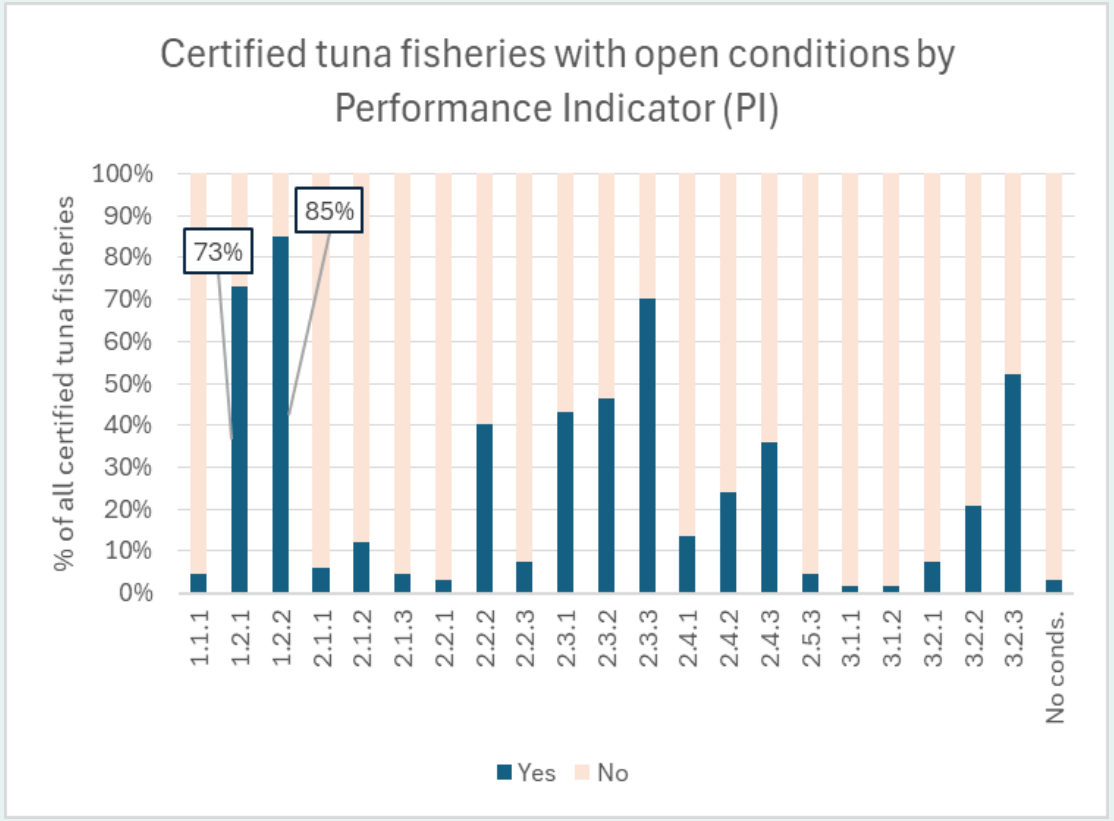
# The Path Ahead

## CLOSING OPEN CONDITIONS FOR MSC-CERTIFIED TUNA FISHERIES

**Of all open conditions for tuna fisheries certified against the MSC Fisheries Standard, the two PIs with the highest number of conditions are 1.2.1 and 1.2.2.**

Over half of these conditions correspond to harmonized conditions opened during application of Section SE to Western Pacific stocks

The rest correspond to other stocks in the Pacific, Atlantic and Indian oceans.




PI 1.2.1 – Harvest Strategy
PI 1.2.2 – Harvest Control Rules & Tools

# The Path Ahead

**ISSF is the only NGO exclusively dedicated to achieving sustainable tuna fisheries. ISSF**

- Stands apart for its **expertise across tuna science, fishery management, and industry operations.**
- **Its diverse governance structure includes scientists, environmental NGOs, and seafood companies—** bringing all stakeholders to the table in an aligned, science-forward approach
- Leads collaborative efforts to improve tuna fishery sustainability through **innovation, implementation integrity**—a powerful force for change

# Q&A

# Turning Science into Action: Global Tuna Progress Through ISSF Collaboration

November 14, 2025

**Dr. Victor Restrepo**
Chair, ISSF Scientific Advisory Committee

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

Turning Science into Action:

# Global Tuna Progress Through ISSF Collaboration

INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## TODAY'S TOPICS

**Tuna Stock Health**

**Traceability & Mitigating IUU**

**Harvest Strategies**

**Observer Coverage & Electronic Monitoring**

**Bycatch Mitigation & FAD Management**

# Tuna Stock Health

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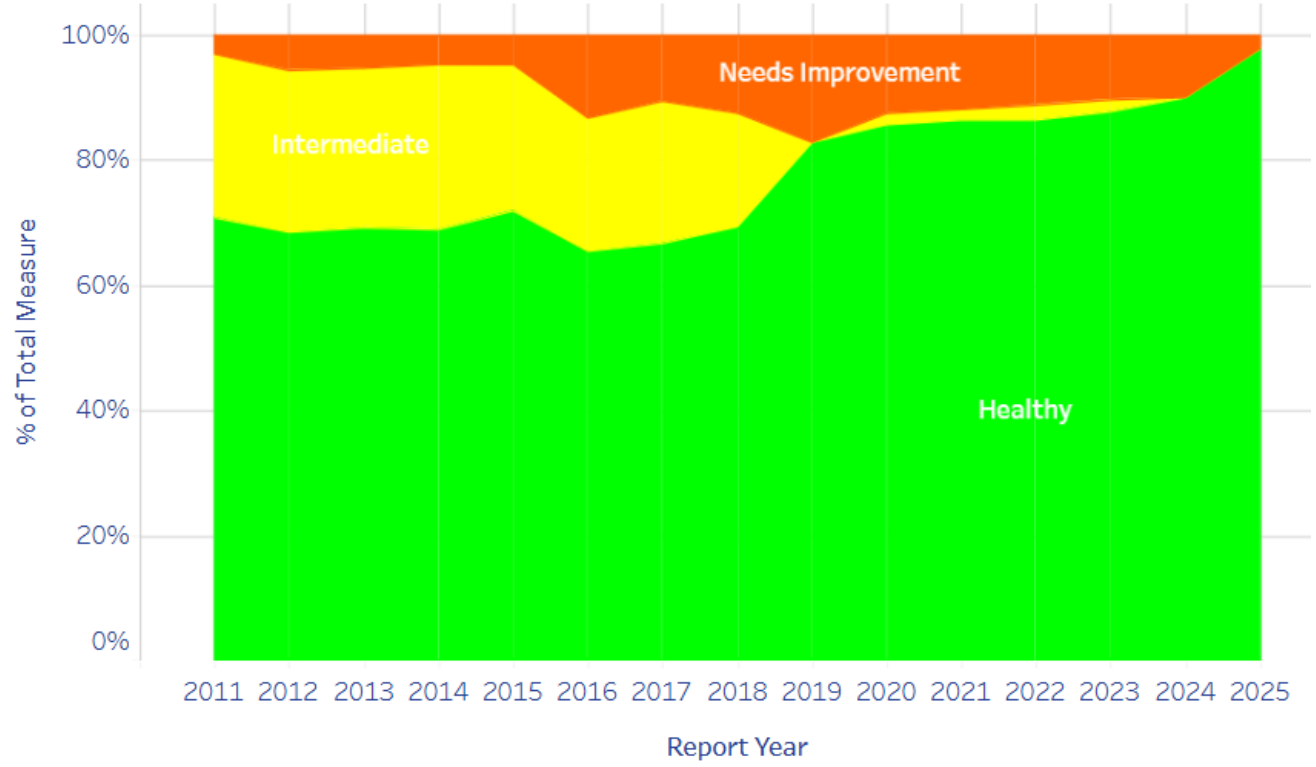
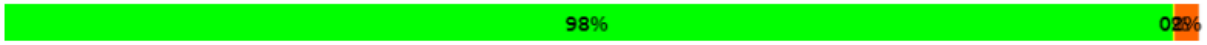
# Status of the 23 Major Tuna Stocks

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

**AS OF MARCH 2025**




Detail of 2025 (rounded)




**A growing share of the global tuna catch comes from stocks that are not subject to overfishing, thanks largely to improved management by RFMOs.**

# Status of the Major Commercial Tuna Stocks

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

**AS OF MARCH 2025**



**7 Species, 23 stocks**

Average catch 2019-2023: **5.2 million tonnes**

| STOCK | CATCH | SSB | F |
|---|---|---|---|
| **Albacore tuna** | | | |
| PO-ALB-N | 34 | | |
| PO-ALB-S | 68 | | |
| AO-ALB-N | 28 | | |
| AO-ALB-S | 22 | | |
| AO-ALB-M | 2 | | |
| IO-ALB | 42 | | |
| **Bigeye tuna** | | | |
| EPO-BET | 67 | | |
| WPO-BET | 134 | | |
| AO-BET | 61 | | |
| IO-BET | 106 | | |
| **Bluefin tuna** | | | |
| PO-PBF* | 18 | | |
| AO-BFT-E | 39 | | |
| AO-BFT-W | 3 | | |
| SH-SBT | 17 | | |
| **Skipjack tuna** | | | |
| EPO-SKJ | 389 | | |
| WPO-SKJ | 1619 | | |
| AO-SKJ-E | 220 | | |
| AO-SKJ-W | 30 | | |
| IO-SKJ | 689 | | |
| **Yellowifn tuna** | | | |
| EPO-YFT | 306 | | |
| WPO-YFT | 737 | | |
| AO-YFT | 140 | | |
| IO-YFT* | 401 | | |

*Compiled from RFMO reports.*

# Tuna Fisheries vs. MSC Standard

## P1-Atlantic Ocean ICCAT

| Component | PI No. | Performance Indicator (PI) | Yellowfin Score | Bigeye Score | Western Skipjack Score | Eastern Skipjack Score | North Albacore Score | South Albacore Score | Med Albacore Score | Eastern Bluefin Score | Western Bluefin Score |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Outcome | 1.1.1 | Stock Status | 90 | 70 | 100 | 80 | 100 | 100 | Fail | 70 | 60 |
| | 1.1.2 | Stock Rebuilding | | 80 | | | | | 60 | 100 | 80 |
| Management | 1.2.1 | Harvest Strategy | 80 | 65 | 75 | 75 | 95 | 80 | 60 | 95 | 95 |
| | 1.2.2 | Harvest control rules and tools | Fail | 65 | 60 | 60 | 80 | 60 | 60 | 80 | 80 |
| | 1.2.3 | Information / monitoring | 80 | 80 | 80 | 80 | 90 | 80 | 65 | 75 | 75 |
| | 1.2.4 | Assessment of stock status | 95 | 100 | 90 | 90 | 95 | 85 | 85 | 90 | 90 |
| Weighted Principle-level scores | | | | | | | | | | | |
| | | Stock rebuilding required? | No | Yes | No | No | No | No | Yes | Yes | Yes |
| | | P1 Score: | Fail | 76.3 | 88.1 | 78.1 | 95.0 | 88.1 | Fail | 85.0 | 77.5 |

## P1-Pacific Ocean

| Component | PI No. | Performance Indicator (PI) | Western Yellowfin Score | Western Bigeye Score | Western Skipjack Score | Eastern Yellowfin Score | Eastern Bigeye Score | Eastern Skipjack Score | North Albacore Score | South Albacore Score | Pacific Bluefin Score |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Outcome | 1.1.1 | Stock Status | 100 | 100 | 100 | 80 | Fail | 90 | 90 | 100 | 60 |
| | 1.1.2 | Stock Rebuilding | | | | | 80 | | | | Fail |
| Management | 1.2.1 | Harvest Strategy | 75 | 75 | 80 | 80 | 75 | 80 | 70 | 70 | 80 |
| | 1.2.2 | Harvest control rules and tools | 60 | 60 | 75 | 80 | 80 | 80 | Fail | 60 | 75 |
| | 1.2.3 | Information / monitoring | 80 | 80 | 90 | 80 | 80 | 80 | 90 | 80 | 90 |
| | 1.2.4 | Assessment of stock status | 95 | 95 | 95 | 90 | 90 | 90 | 95 | 90 | 95 |
| Weighted Principle-level scores | | | | | | | | | | | |
| | | Stock rebuilding required? | No | No | No | No | Yes | No | No | No | Yes |
| | | P1 Score: | 88.8 | 88.8 | 92.5 | 81.3 | Fail | 86.3 | Fail | 87.5 | Fail |

## P1-Indian Ocean

| Component | PI No. | Performance Indicator (PI) | Yellowfin Score | Bigeye Score | Skipjack Score | Albacore Score |
|---|---|---|---|---|---|---|
| Outcome | 1.1.1 | Stock Status | 80 | 70 | 100 | 100 |
| | 1.1.2 | Stock Rebuilding | | 60 | | |
| Management | 1.2.1 | Harvest Strategy | 65 | 75 | 85 | 60 |
| | 1.2.2 | Harvest control rules and tools | Fail | Fail | 75 | Fail |
| | 1.2.3 | Information / monitoring | 80 | 80 | 80 | 80 |
| | 1.2.4 | Assessment of stock status | 90 | 100 | 95 | 85 |
| Weighted Principle-level scores | | | | | | |
| | | Stock rebuilding required? | No | Yes | No | No |
| | | P1 Score: | Fail | Fail | 91.9 | Fail |

## P1-Southern Ocean

| | | Southern Bluefin Score |
|---|---|---|
| | 1.1.1 | 70 |
| | 1.1.2 | 90 |
| | 1.2.1 | 95 |
| | 1.2.2 | 85 |
| | 1.2.3 | 90 |
| | 1.2.4 | 100 |
| Weighted Principle-level scores | | |
| | Stock rebuilding required? | Yes |
| | P1 Score: | 86.3 |

11 stocks below SG80 for P1, mostly due to lack of HS. P1 relates to managing fisheries in a way that does not lead to overfishing, or leads to rebuilding


*Source*: ISSF 2025

# Harvest Strategies

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# Why Harvest Strategies Matter

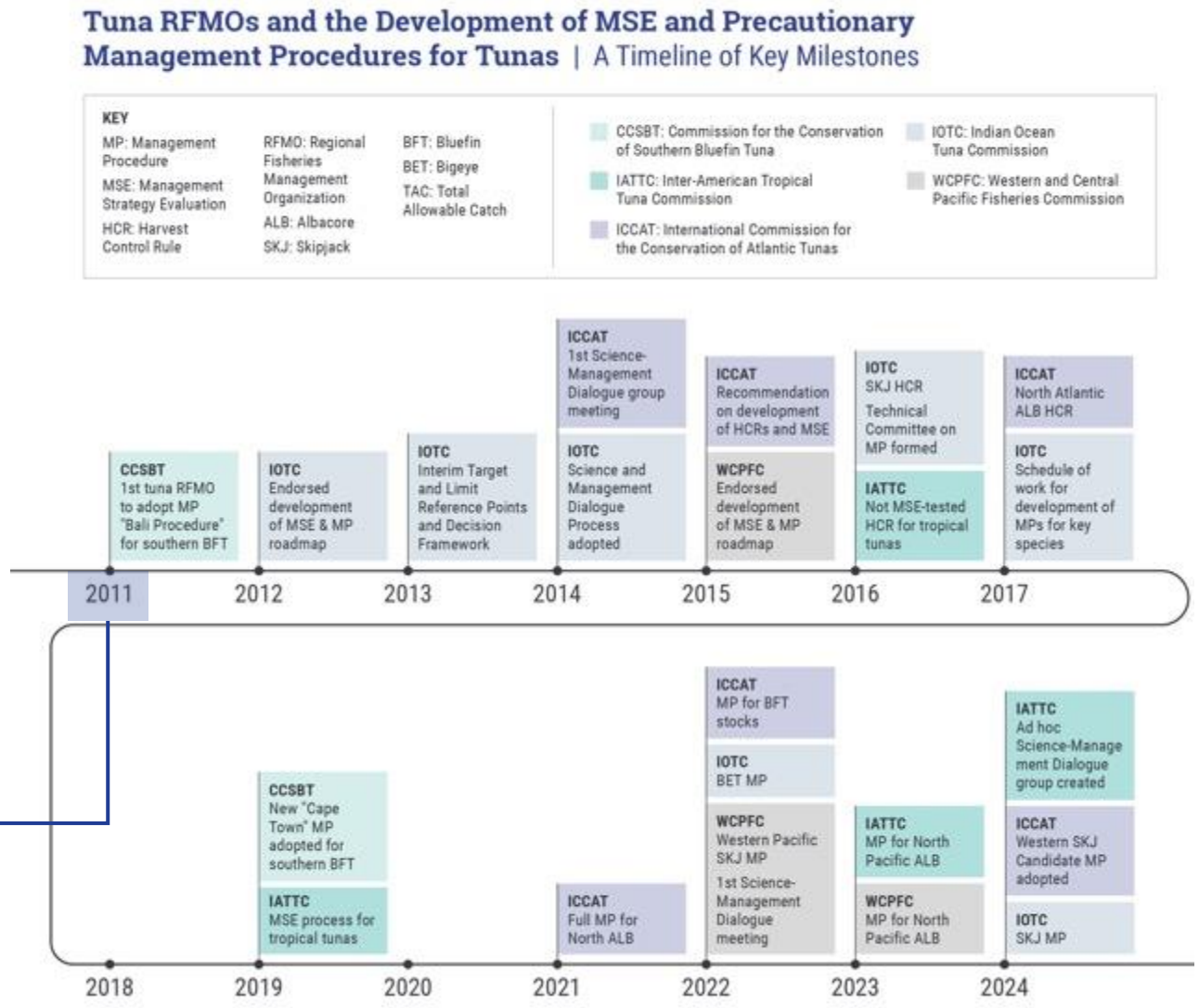
## SCIENCE-BASED, PRE-AGREED DECISION MAKING

**Harvest strategies (aka management procedures or MPs) are essential tools for sustainable, science-driven fisheries management**

- Include monitoring programs, stock assessments, harvest control rules (HCRs), & reference points to guide management
- Define management responses in advance to help reduce political pressure and promote transparency, consistency, and long-term stock health

**15 Years Ago**

RFMOs just beginning to consider the adoption of harvest strategies

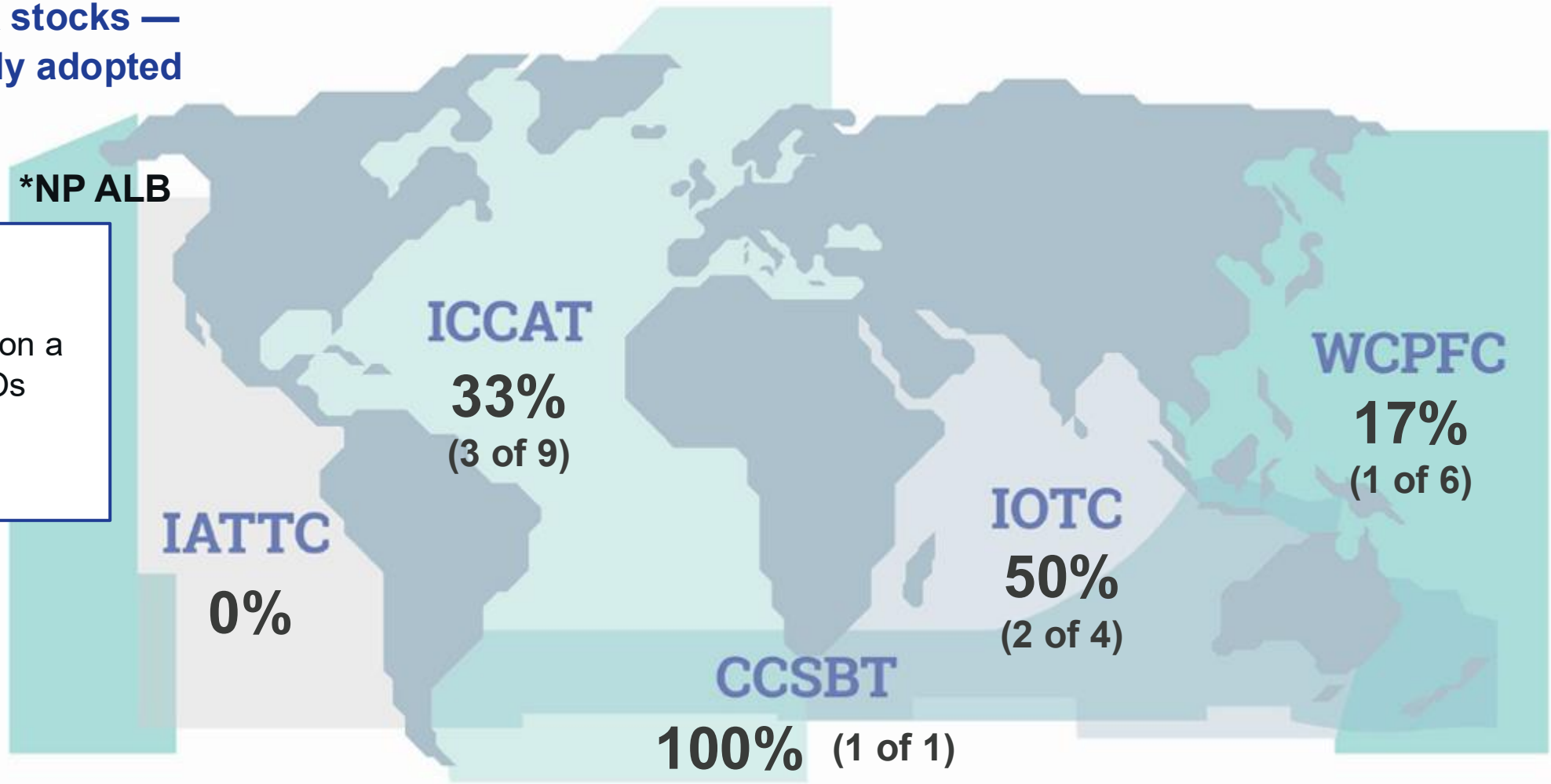


# Progress on Harvest Strategies in Tuna RFMOS

**8 of 23 global tuna stocks — or 30% — have fully adopted harvest strategies**

**Today**

With MSC certification a key driver, all RFMOs working to develop harvest strategies



# Bycatch Mitigation & FAD Management

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# All Fisheries Have Impacts

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## Non-Target Species
### Caught in Tuna Fisheries

**Order of mortality** - from highest to lowest
(gears with minimal impact are not listed)

> ! All fishing gears have environmental impacts. Depending on the species, some gears have more impact than others.

**MANTA RAYS**

**Purse Seine** free school set > *more than* **Purse Seine** floating object set > **Longline**

**WHALE SHARKS**

**Purse Seine** whale shark set ≈ *about the same as* **Gillnet**

**SEA TURTLES**

**Gillnet** ≫ **Longline** ≫ *much more than* **Purse Seine**

**CETACEANS**

**Gillnet** > **Trawl** ≈ **Longline** ≈ **Purse Seine** dolphin set ≫ **Purse Seine** other

**SEABIRDS**

**Longline** ≫ **Trawl** ≈ **Gillnet**

**SHARKS**

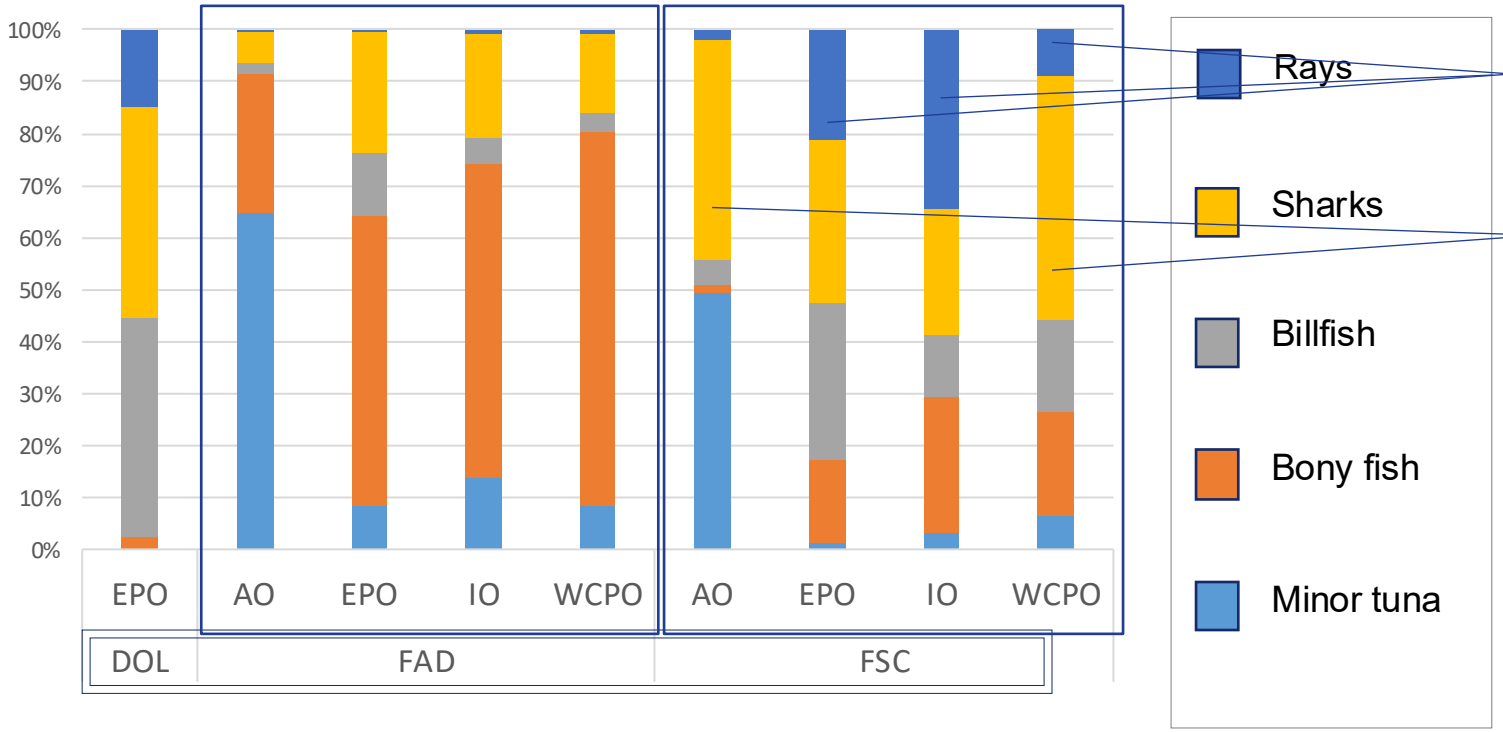
**Gillnet** ≈ **Longline** ≫ **Purse Seine** floating object set > **Purse Seine** free school set

Source: ISSF Technical Report 2015-02 – Preliminary study of the relative fishery impacts on non-tuna species caught in various tuna fisheries

# Purse Seine Bycatch

## BY SPECIES GROUP

### ALL OCEANS — Current % Bycatch by Species Group & Set Type




**Rays** are more common in free school sets.

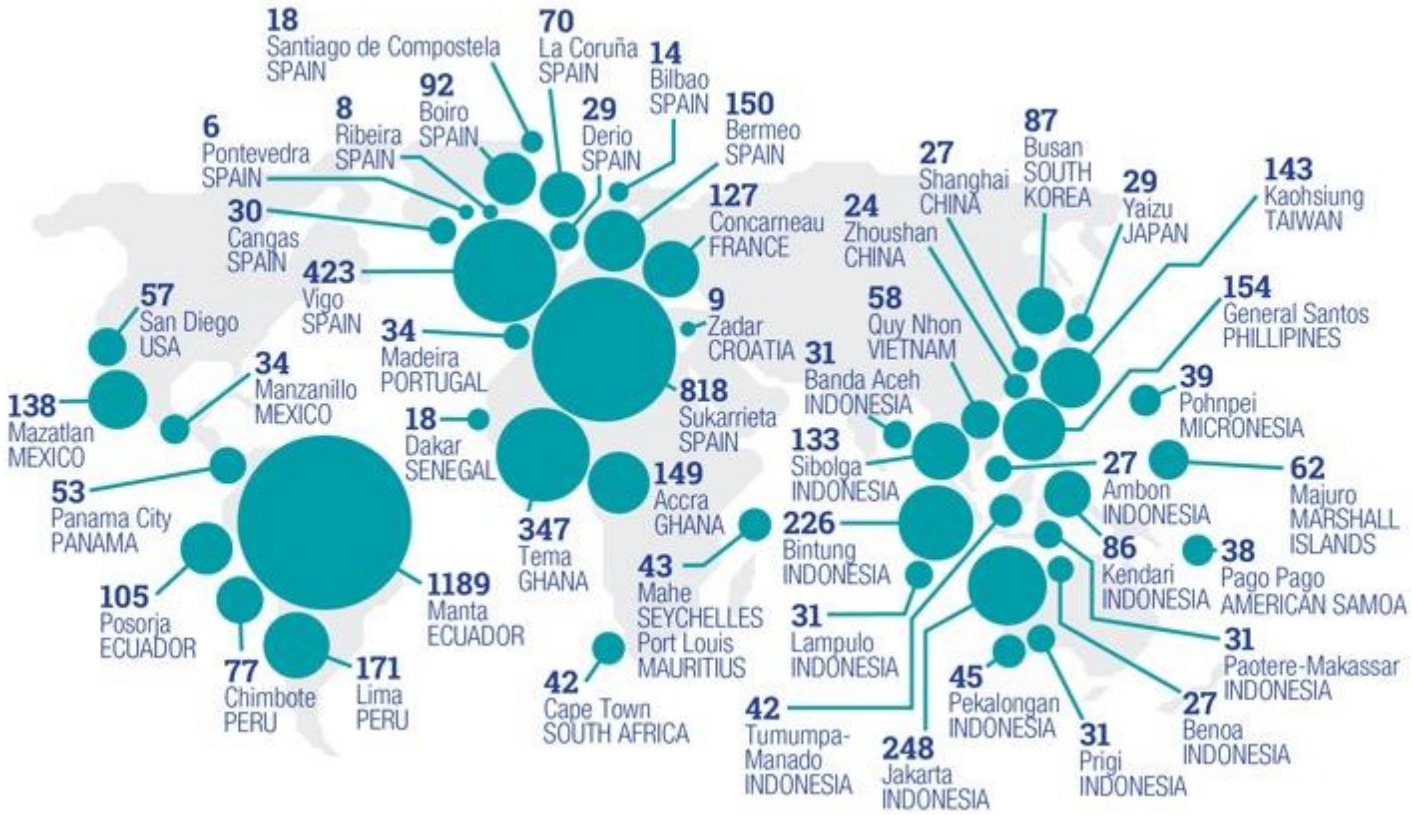
In some regions, **shark bycatch** % is higher in free school sets.

*Source:* Observer data provided from SPC (WCPO), IATTC (EPO) and by the research institutes in charge of EU-PS observer programs in the Atlantic and Indian oceans. Data is 2013-2017 for all oceans, except Atlantic Ocean, which is 2012-2016. Note:"FAD" to include all associated sets, e.g. sets on natural logs would be included there too.

# Our Approach to (Bycatch) SCIENCE

# Our Approach to (Bycatch) SCIENCE

## ISSF SKIPPERS WORKSHOP ATTENDANCE | 2009–June 2025



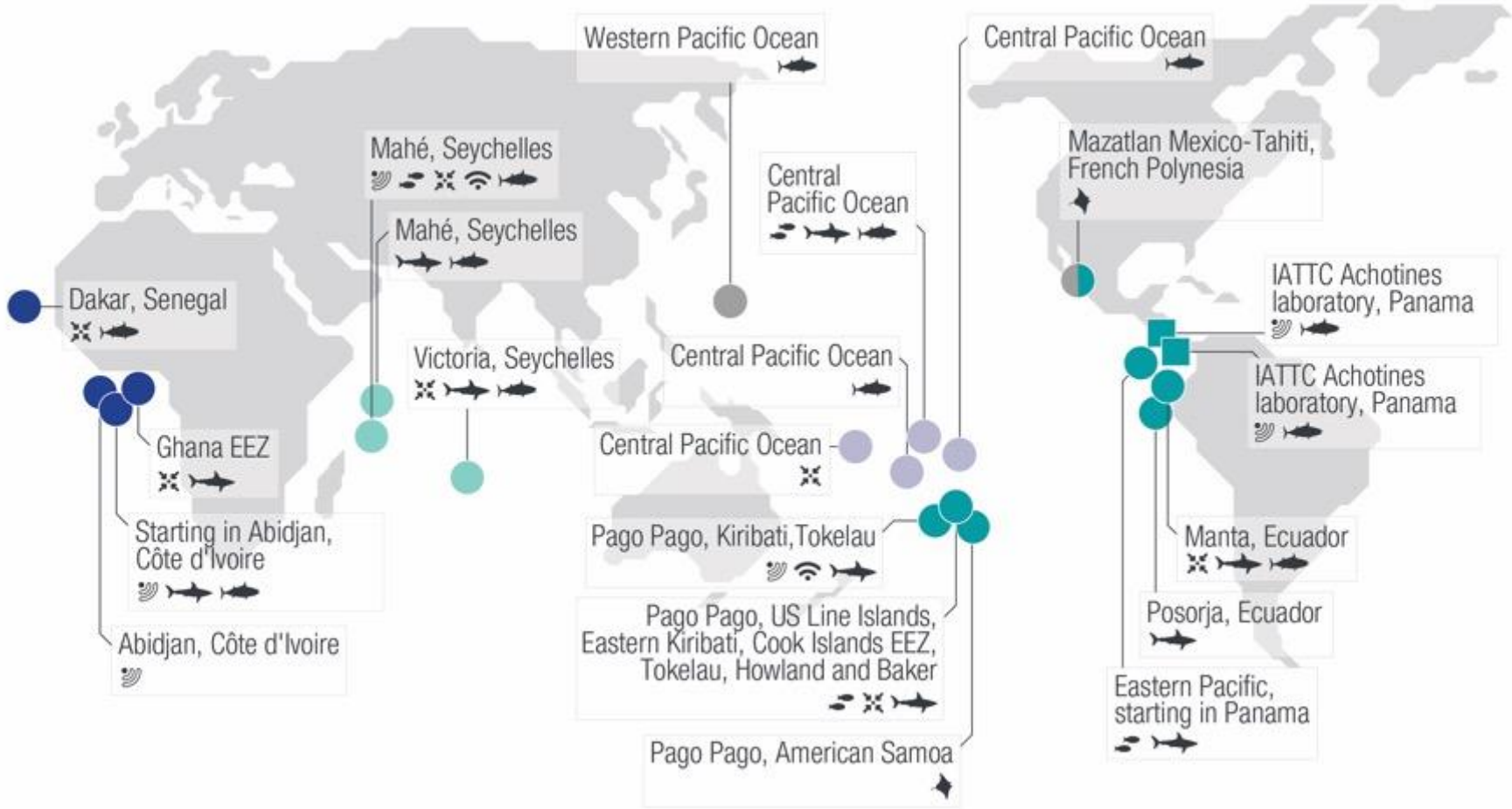


ISSF has conducted **135 Workshops**, in **44 Locations** / **23 Countries**, with **4,900 Skippers** and **Crew**

# At-Sea Research & Experiments

**2011–2024**

*Excludes biodegradable FAD tests*




**Type of Research**

- Cruises
- Field Work

**Location**

- Atlantic Ocean
- Indian Ocean
- Eastern Pacific Ocean
- Central Pacific Ocean
- Western Central Pacific Ocean

**Research Subject**

- Acoustic discrimination
- Bycatch mitigation
- FAD designs
- Mobula rays
- Monitoring
- Sharks
- Tuna

# Chronological Hierarchy of Bycatch Mitigation

# Understanding Entanglement at FADs

**Scientists, Managers, Fishers:**

Problem of entanglement of sharks in nets of FADs was considered negligible compared to fishery mortality.

*Filmalter, J.D., Capello, M., Deneubourg, J., Cowley, P.D. and Dagorn, L. (2013), Looking behind the curtain: quantifying massive shark mortality in fish aggregating devices. Frontiers in Ecology and the Environment, 11: 291-296.* https://doi.org/10.1890/130045

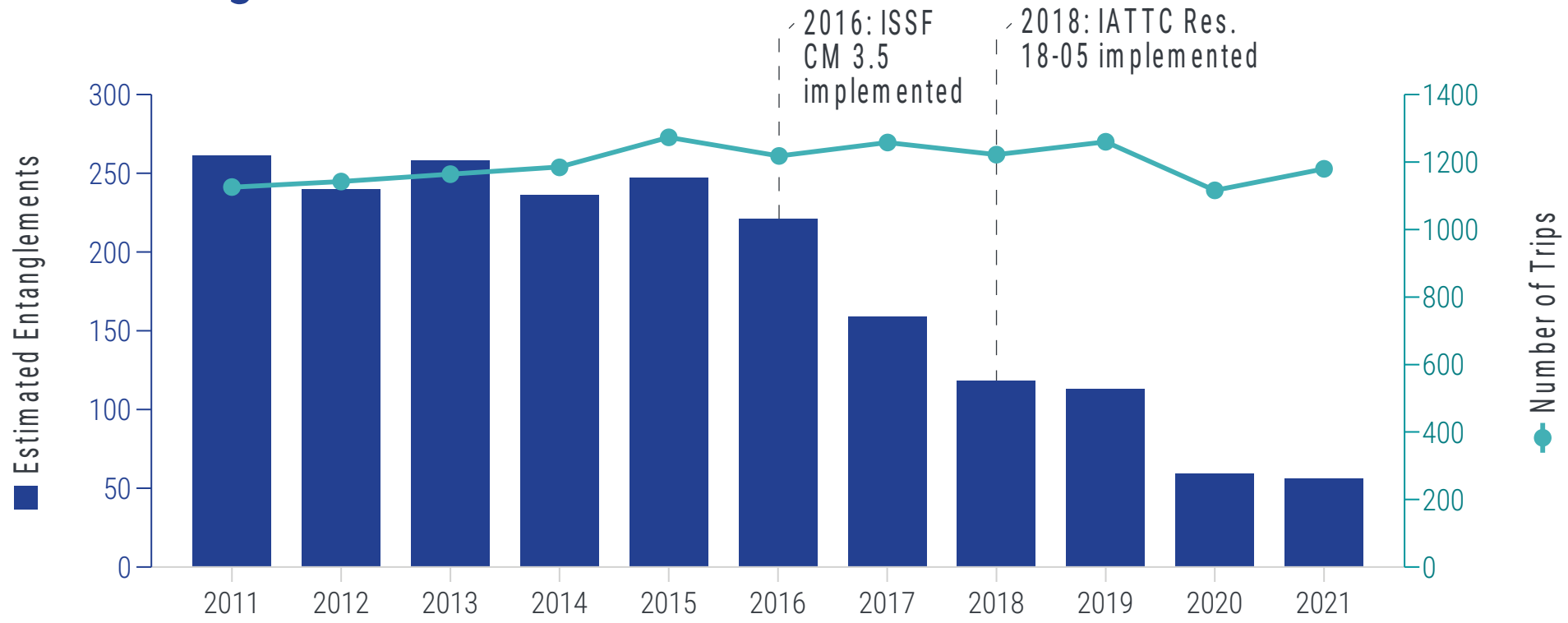
# Entanglements at FADs in the Eastern Pacific

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

**OBSERVER DATA REVIEW**

Sea Turtle

## Rate of Entanglement in Tuna Fisheries



# Fully NEFADs Without Netting

## NON-Entangling FADs

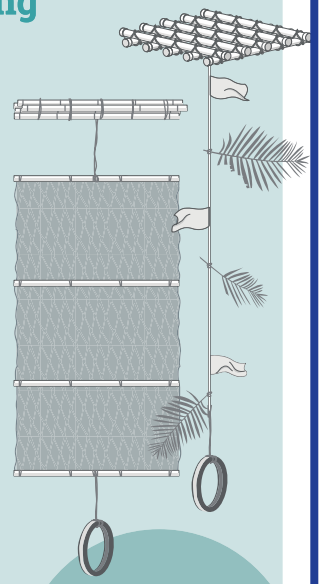
**RAFT**

Not constructed or covered with canvas, tarpaulin or shade clothes.

**TAIL**

Subsurface structure is made with ropes, canvas or nylon sheets, or other non-entangling materials.

More detail on the previous page.



No netting is used in any components (raft and tail)

These FADs are expected to have no risk of causing entanglement.

## LOWER Entanglement Risk FADs

**RAFT**

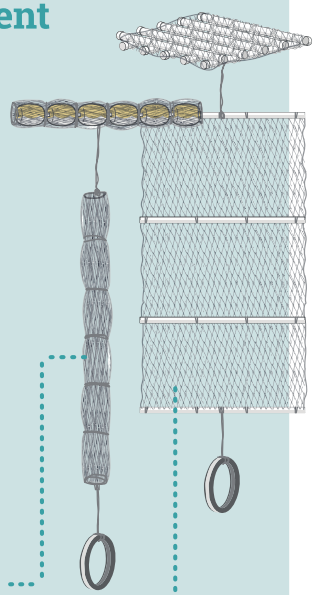
Use only small mesh netting (< 2.5 inch / 7 cm stretched mesh) if covering with net (both upper and submerged parts).

If small mesh netting is used as cover, it is tightly wrapped, with no loose netting hanging from the raft.

**TAIL**

If net is used as submerged tail, could be of any mesh size if tightly tied into sausage-like bundles.

If open panel netting is used, only small mesh size (< 2.5 inch [7 cm] stretched mesh) can be used, but weight the panel to keep it taut.



Despite using netting, these design elements reduce the risk of entanglement events.

## HIGH Entanglement Risk FADs

**RAFT**

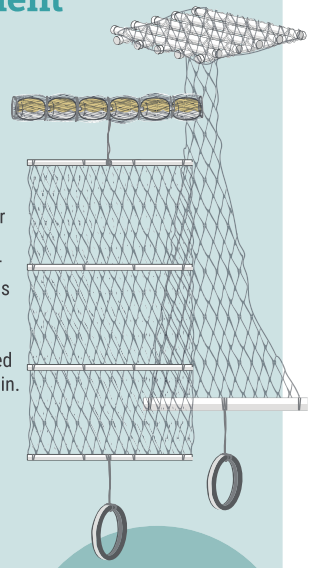
Covered with large mesh netting (e.g. > 2.5-inch mesh).*

If mesh size is larger than 2.5 inches (both in the upper or submerged part), it is high entanglement, whether the net is tightly tied or covered by canvas or tarpaulin.

**TAIL**

Submerged part of the FAD constructed with open panels of large mesh netting (> 2.5-inch mesh).

*Accounting for mesh sizes available in the market, 2.5 inch (7 cm) mesh size offers the lowest likelihood of entanglements across species and body parts.



These FADs are known to cause entanglements with turtles and sharks.

## Non-Entangling Timeline

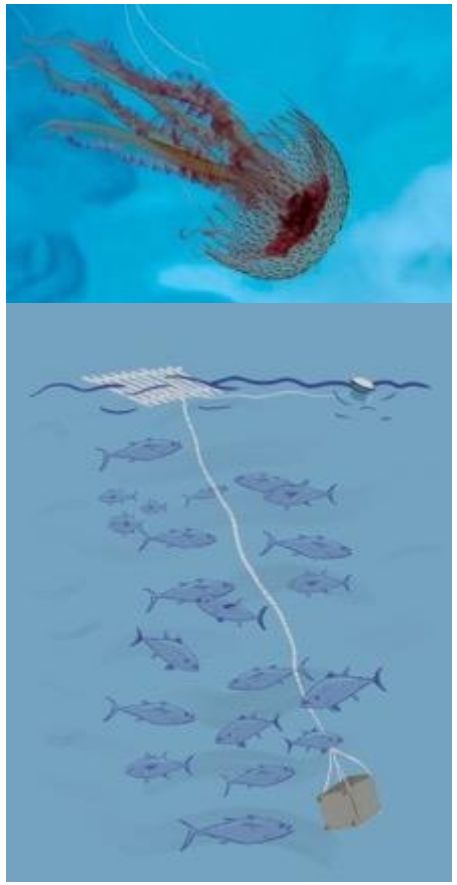
- 2020 — Indian Ocean
- 2021
- 2022
- 2023
- 2024 — Western Pacific Ocean
- 2025 — Atlantic Ocean; Eastern Pacific Ocean

# Non-Entangling AND Biodegradable: Jelly-FAD Design

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## Horribilis-FAD

## Jelly-FAD



Marine Policy 147 (2023) 105352

Contents lists available at ScienceDirect

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journal homepage: www.elsevier.com/locate/marpol

The Jelly-FAD: A paradigm shift in the design of biodegradable Fish Aggregating Devices

Gala Moreno[a,*], Joaquín Salvador[b], Iker Zudaire[c], Jefferson Murua[c], Josep Lluís Pelegrí[b], Jon Uranga[c], Hilario Murua[a], Maitane Grande[c], Josu Santiago[c], Víctor Restrepo[a]

[a] International Seafood Sustainability Foundation (ISSF), 3706 Butler Street Suite #316, Pittsburgh, PA 15201-1820, USA
[b] Institut de Ciències del Mar (ICM), Passeig Marítim de la Barceloneta, 37–49, 08003 Barcelona, Spain
[c] AZTI, Marine Research, Basque Research and Technology Alliance (BRTA), Pasaia, Gipuzkoa, Spain

**WINNER**
**Responsible Seafood Innovation Award**

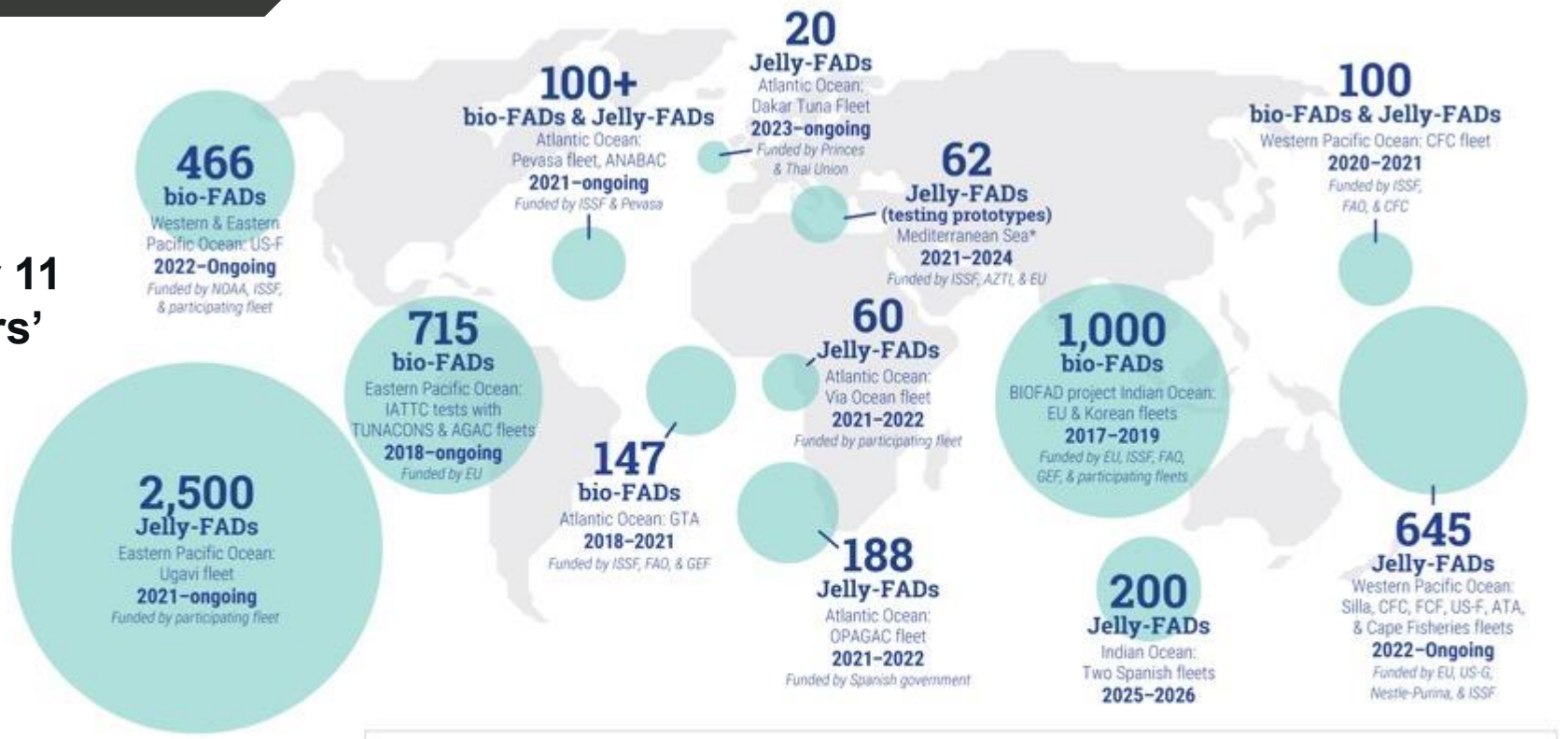
# Conclusion from bioFAD Trials

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## NEW ISSF TRIALS & LARGE-SCALE DEPLOYMENT

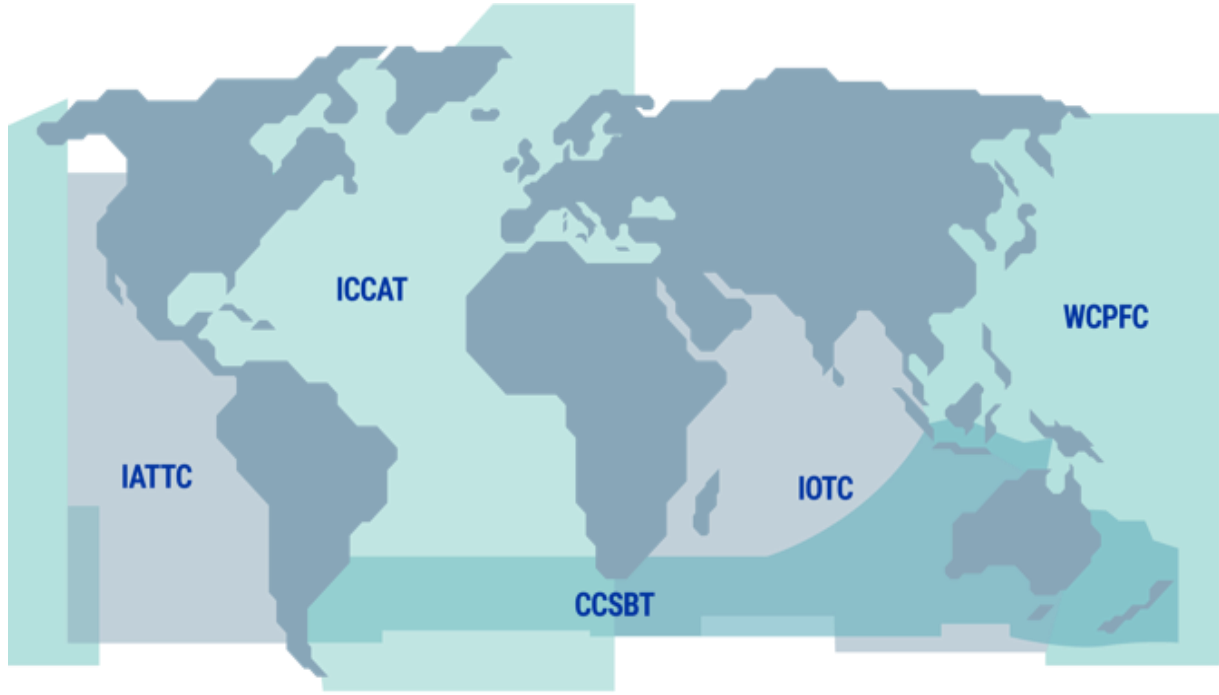
**2018–PRESENT**

- **Achieve similar catches and performance** as conventional FADs
- **Lifespan**: sets were made after **11 months at sea**, **meeting fishers' needs for lifespan**
- Success relies on **number of Jelly-FADs deployed**
- **Ongoing tests** w/ fleets from Korea, Taiwan, China, Spain, FSM, USA and Ecuador
- **Next Steps**: Test a new generation of Jelly-FADs in controlled conditions



# Management Measures on Biodegradable FADs

| RFMO | Management Measures |
|---|---|
| **IATTC 2023** | Stepwise implementation of bio-FADs from 2026 to 2029 (Except plastic flotation). In 2030, decide about plastic flotation. |
| **WCPFC** | Not required but encouraged |
| **IOTC** | Stepwise implementation of bioFADs from 2026 to 2030. Including flotation. |
| **ICCAT** | Stepwise implementation of bioFADs from 2025 to 2028. Including flotation. |

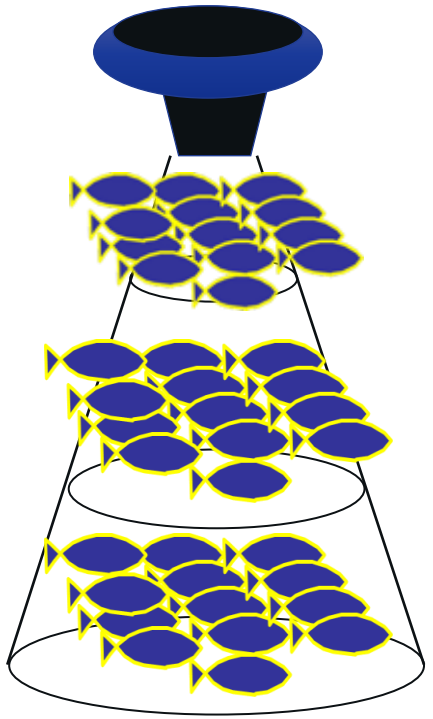


# Chronological Hierarchy of Bycatch Mitigation

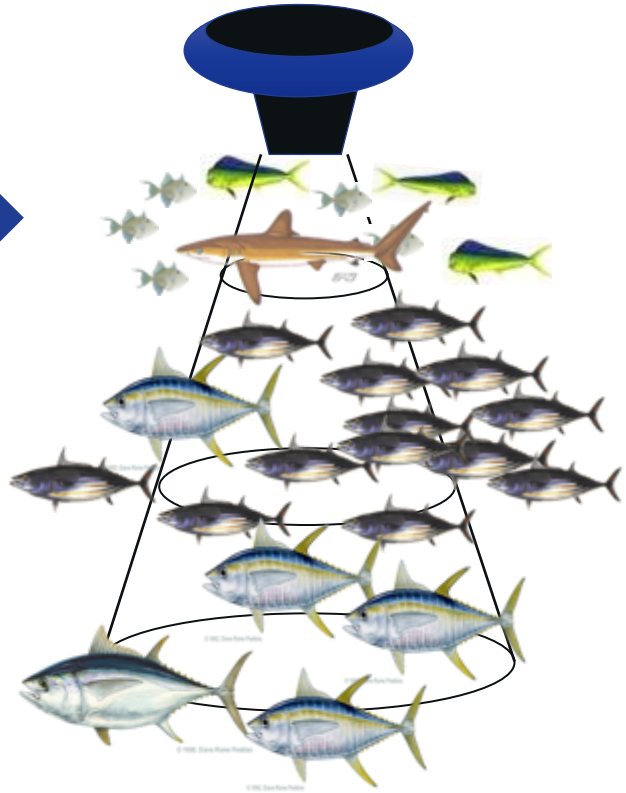
# Acoustic Discrimination

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

**ROUGH BIOMASS ESTIMATES**

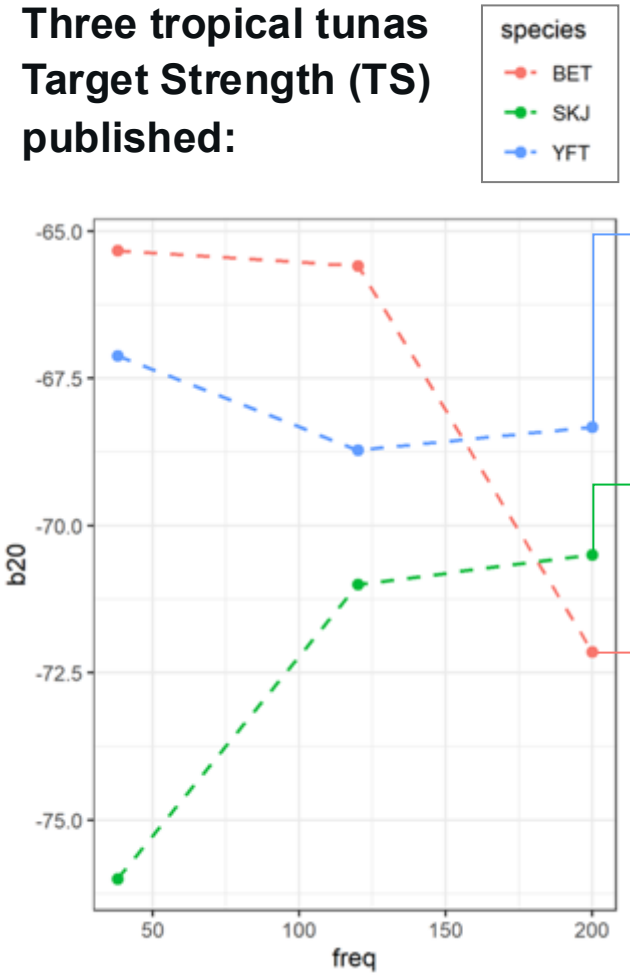


**BIOLOGICALLY RELEVANT MEASURES**



# Acoustic Discrimination

**Three tropical tunas Target Strength (TS) published:**

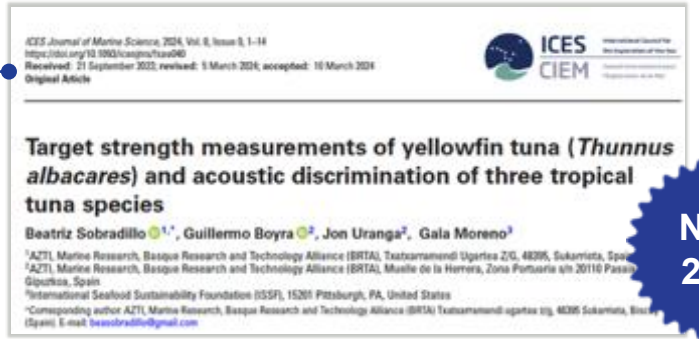



**YFT** TS obtained in Panama has an intermediate value between BET and SKJ and a fairly flat frequency response.

**SKJ** TS grows with frequency, as expected, due to its lack of swimmbladder.

**BET** TS is much higher, staying at 38 and 120, dropping drastically at 200 kHz.

Yellowfin
*Thunnus albacares*




NEW 2024

Skipjack
*Katsuwonus pelamis*


Bigeye
*Thunnus obesus*

# Acoustic Discrimination

- Support buoy manufacturers in enhancing their hardware to **differentiate tuna species.**
- Provide support to **refine algorithms** for tuna species discrimination.
- Develop a **training curriculum.**

PLOS ONE

RESEARCH ARTICLE

Towards acoustic discrimination of tropical tuna associated with Fish Aggregating Devices

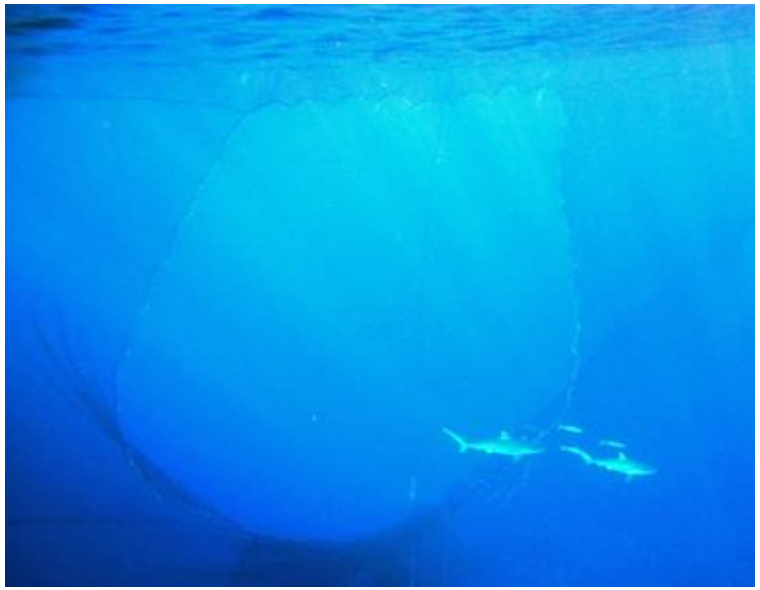
**Gala Moreno[1]*, Guillermo Boyra[2], Igor Sancristobal[3], David Itano[4], Victor Restrepo[1]**

**1** International Seafood Sustainability Foundation (ISSF), Washington DC, United States of America, **2** Sustainable fisheries management, Marine Research, Azti-Tecnalia, Pasaia, Gipuzkoa, Spain, **3** Sustainable Management of Fisheries, Collecte Localisation Satellites (CLS), Ramonville-Saint-Agne, France, **4** Fisheries consultant, Honolulu, Hawaii, United States of America

# Chronological Hierarchy of Bycatch Mitigation

# Shark Releases from the Net

## TESTING VARIOUS METHODS



Sharks aggregate in a particular area of the net → **Create a window** in the net to let the sharks swim out.

Fish and Release → **Fishing for shark in the net**

Attracting shark on the net → Can we **attract sharks away from FADs** (e.g. using bait), then set on tunas?

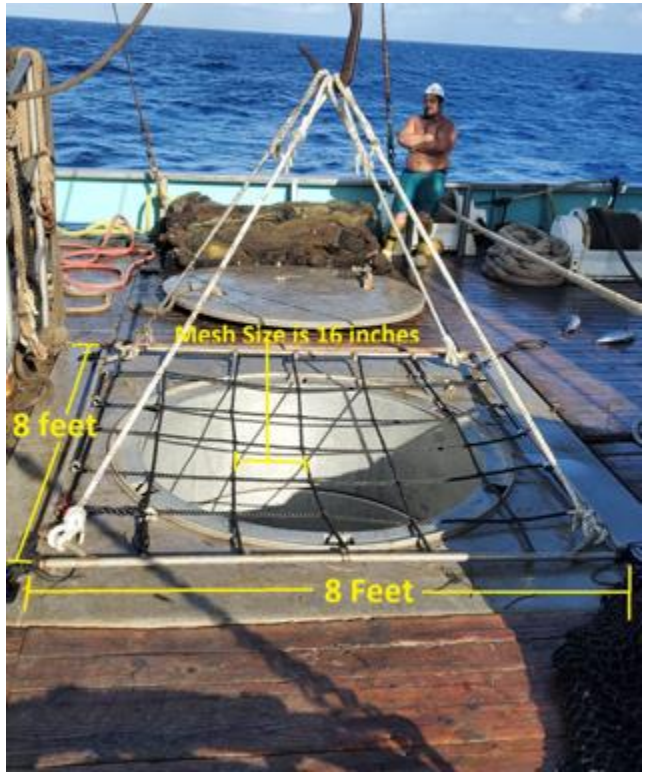
50% success

# Chronological Hierarchy of Bycatch Mitigation

# Design & Testing of Sorting Grids

**Sorting grids constructed for each of the 12 U.S. tropical tuna purse seine vessels**

Design varied based on vessel specifications.



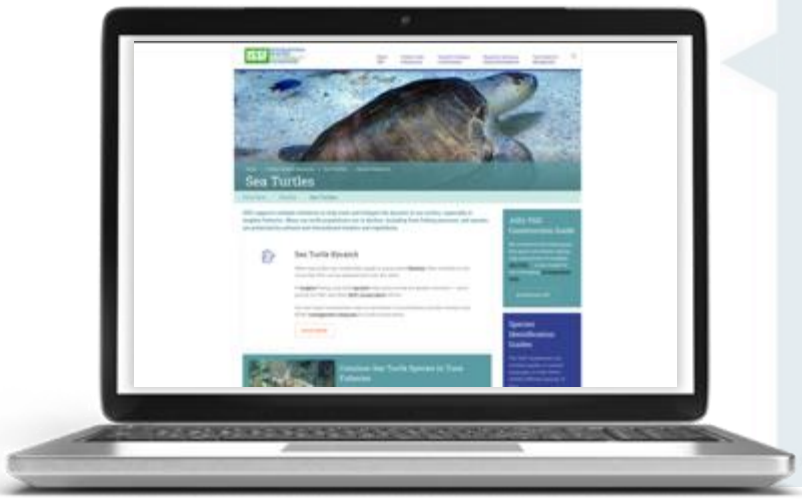
# Design & Testing of Sorting Grids

# Chronological Hierarchy of Bycatch Mitigation

# ISSF Sea Turtle Conservation

## PROJECTS TO DATE

ISSF supports sea turtle **research, conservation,** and **educational projects** worldwide — including in Brazil, Tanzania, Peru, and Oman — through a more than $100,000 annual fund created by several ISSF Participating Companies.




iss-foundation.org/fishery-goals-and-resources/our-priorities/bycatch-reduction/sea-turtles

WESTERN **PACIFIC OCEAN**

- Leatherback Conservation in Bird's Head Region, Papua Barat, Indonesia* – Turtle monitoring and nest protection year-round at two index beaches; team in 2022 protected 1,443 leatherback nests, which produced an estimated 110,090 hatchlings, and 213 hard-shelled **species**
- Community-Based Leatherback Conservation in Solomon Islands

**EASTERN PACIFIC OCEAN**

- Prevention and Reduction of Marine Turtle Fishery Bycatch in Peru, Ecuador, and Chile* – In 2023, project supports rapid bycatch assessments and **bycatch mitigation**, including fisher and **observer** training in safe handling and release techniques, as well as use of LEDs to reduce turtle bycatch
- Hawksbill Conservation in Nicaragua and El Salvador*– Project spans two nesting beaches and two bycatch reduction sites; in 2022, 98% of nests laid were protected, and more than 35,000 hawksbill hatchlings were released

**INDIAN OCEAN**

- Monitoring and conservation of sea turtles in the Andaman and Nicobar Islands, India* – Underway since 2011, this project has enabled local community and government programs to carry out sea turtle conservation; program is well established on Little Andaman Island and is expanding to remote Nicobar Islands
- Community based sea turtle conservation in Tanzania* – Project has included advocacy meetings with municipal representatives, education sessions at secondary **schools**, and awareness activities for 10 villages; in 2023, a Conservation Officer network will lead conservation efforts on 19 nesting beaches in Kigamboni Municipality
- Seychelles Islands Sea Turtle Conservation
- Working with Local **Fishermen** to Mitigate Loggerhead Bycatch on Masirah Island, Oman

**ATLANTIC OCEAN**

- Sea Turtle Conservation in Brazil* – Local team has protected 1,334 seat turtle nests, including 341 loggerhead nests that produced 18,820 hatchlings, as well as 30km of beaches on the cost of Bahia, the most important loggerhead nesting area in the South Atlantic
- Mitigation of Turtle Meat Consumption on Santiago Island, Cape Verde* – Project funds have supported a radio program with fishers and fishwives, developing an educational video, and outreach awareness materials; the Cape Verde Islands have one of the world's largest loggerhead nesting populations

*Current project

*Source: © ISSF website*

# Conclusions

## PROJECTS TO DATE

- **To improve fundamental knowledge** of tunas, sharks and other vulnerable species (e.g., sensory cues, habitat and distribution)
- **To develop new techniques,** devices and fishing strategy/methods (e.g., innovative technology, improved deck configuration to handle bycatch)
- **To assist fleets in transitioning** to fully NEFAD and biodegradable FADs (evaluate whether current bioFAD designs are sufficient)
- **To develop potential management measures** to further mitigate bycatch impacts
- **To promote** fewer FADs, but “better” FADs (continue trials of **innovative FADs**)

## HOW?

- **Interdisciplinary approach** involving oceanographers, shipyard engineers, NGOs, RFMOs
- **Collaborate closely with fishers** selecting proactive and influential participants
- **Value and Respect** fishers’ input: engage knowledgeable scientists with fishers
- **Incentives:** Support Implementation of voluntary measures
- **Monitor and Verify** the best practices and measures implemented.

# Traceability & Mitigating IUU

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

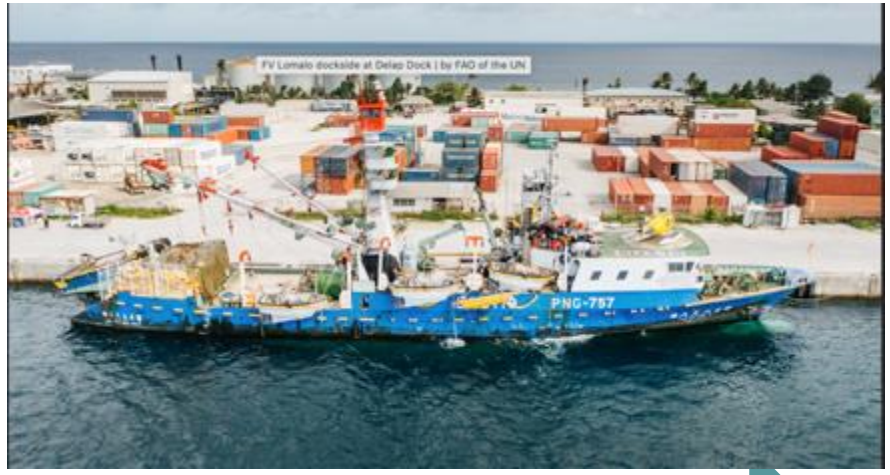
# Monitoring Transshipment – At Sea vs. In Port

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

**On the high seas**


**Off-shore within an EEZ**

**In port**




**most difficult** → **least difficult**

**Degree of Ability to Monitor Transshipment Activities**

# Tackling IUU From Multiple Angles

**Tuna processors globally commit to ISSF Conservation Measures**: traceability, data collection and transshipment, among many others that deter IUU activities



# Tackling IUU From Multiple Angles

**Tuna fishing vessels worldwide** signaling their commitment to fishing best practices that combat IUU:

- ✓ **UVI**
- ✓ **Not IUU Listed**
- ✓ **Observer Coverage**
- ✓ **Use of EM**
- ✓ **& MORE**

**ProActive Vessel Register (PVR)**: 3rd-party auditing validates vessels following science-based, sustainable tuna fishing practices

**Vessels in Other Sustainability Initiatives (VOSI):** Verified resource shows which vessels have made public sustainability commitments beyond PVR

**UVI and IMO Databases**: Track permanent, unique vessel identifiers

**ISSF scientific research and advocacy** guides outreach to RFMOs and governments:

- **Technical advice**
- **Recommendations on effective RFMO governance**
- **Scientific research reports**

**Today**

**All 4 tropical tuna RFMOs** have adopted EM minimum standards

# Observer Coverage & Electronic Monitoring

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

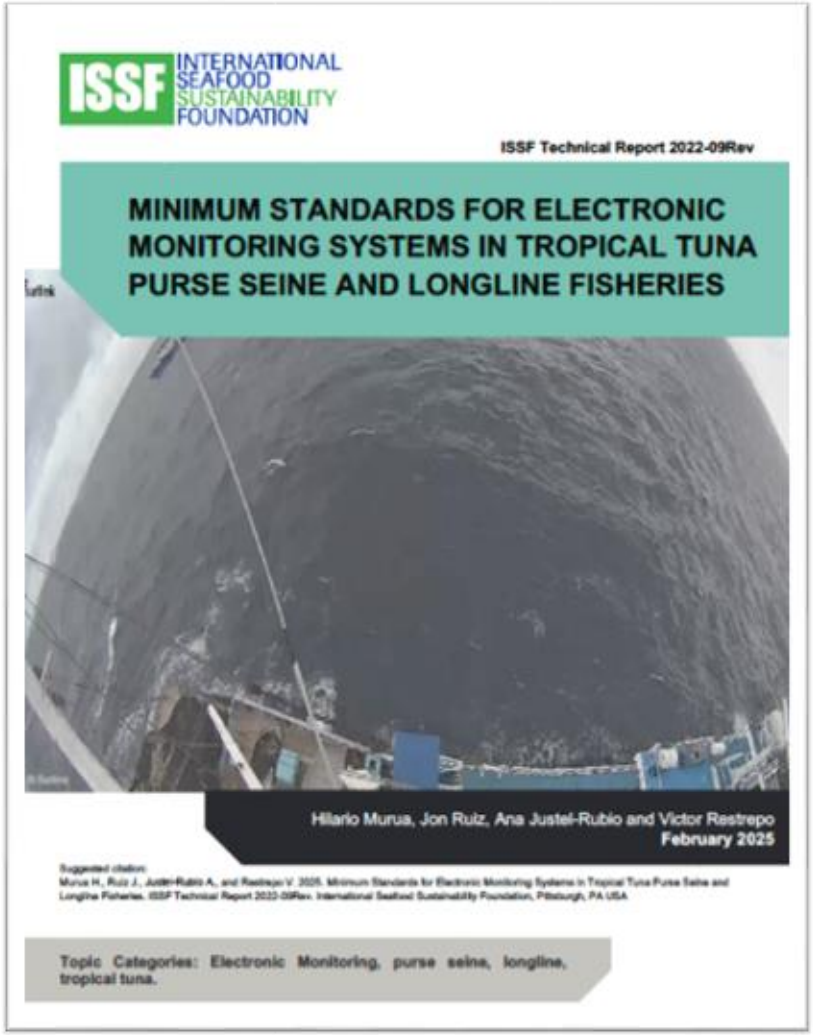
# A Collaborative Push to Embrace and Standardize EM

**ISSF and other partner NGOs have created EMS resources for fishers, policymakers and authorities**

- Best-practices reports
- Minimum standards recommendations
- Data submission guides
- Snapshot assessments of RFMO performance toward EM requirements

**Electronic monitoring systems (EMS)** continuously watch, record, transmit data about activities to governments, RFMOs, other oversight organizations

- **Substitute for or supplement onboard human observer coverage**, for example, documenting catch, bycatch, transshipment and landing activities.
- **Detects overfishing, safety violations and other forms of noncompliance**, including illegal, unreported, or unregulated (IUU) fishing.



# Vessels in Other Sustainability Initiatives (VOSI)

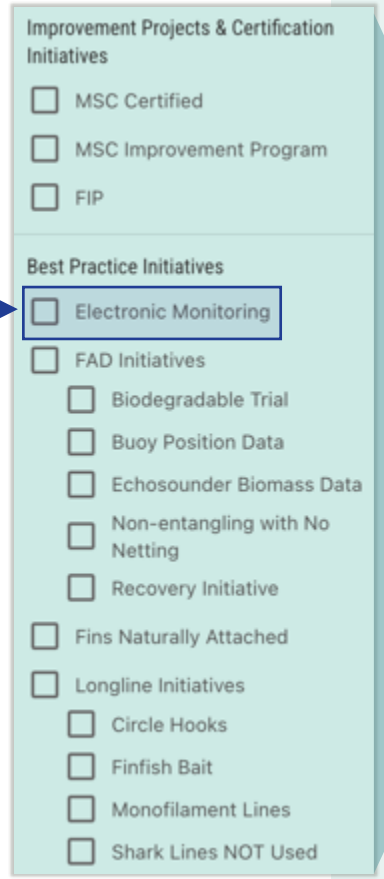
ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

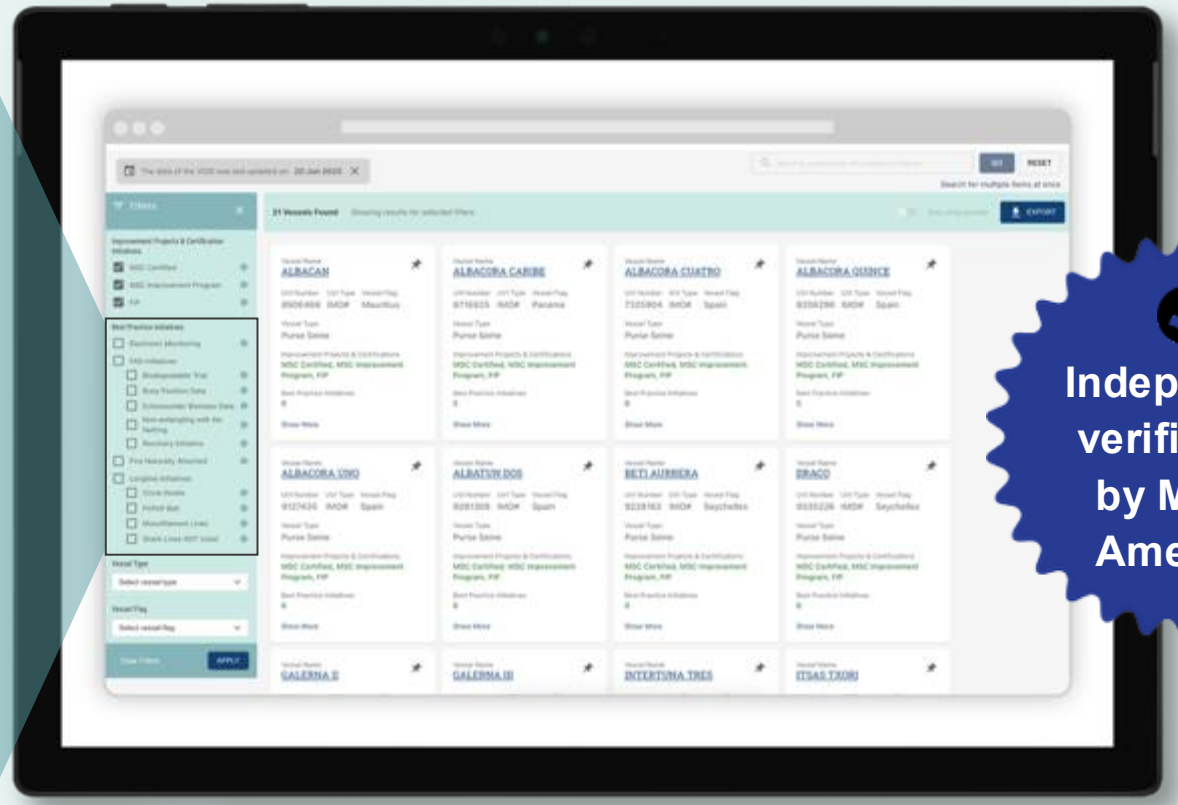
## A RECENTLY UPDATED & EXPANDED TOOL

A transparency tool for the public that want to understand which tuna vessels have made public commitments to more sustainable fishing beyond the commitments reflected on the PVR

**EM** field in the VOSI tool is mechanism for verifying vessel participation in **The Nature Conservancy's Tuna Transparency Pledge**

**VOSI tracks:**



**~111 Vessels with EM on VOSI** as of Sept 2025

**Independent verification by MRAG Americas**

# Dramatic Strides toward Worldwide EMS Use in Recent Years

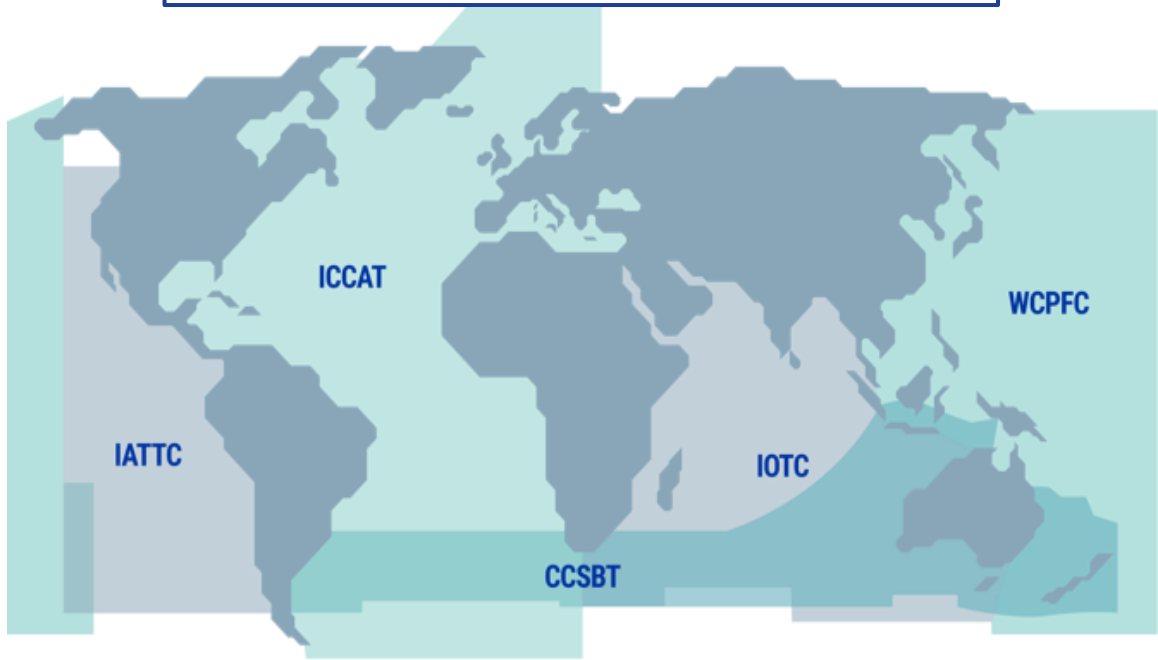
**2024 was an important moment for EM Progress.**

**4 RFMOs ended the year with at least minimum standards in place for longline vessels**.

- **IATTC** - LL and PS Interim EM Minimum Standards ADOPTED September 2024
- **ICCAT -** LL and PS EM Minimum Standards ADOPTED November 2023
- **IOTC** - ADOPTED LL, PS, P&L EM definitions, EM program and data minimum standards May 2023 (1st RFMO to do so)
- **WCPFC** - LL and PS Interim EM Minimum Standards ADOPTED in September 2024

**Today**

All RFMOS poised to remedy longstanding problem of subpar observer coverage on longline vessels



# Q&A

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# Tuna Sustainability Progress: The Growth of MSC Certified Fisheries

Alberto C. Martín Aristín, Program Director Spain & Portugal
Seth McCurry, Senior Commercial Manager UK & Ireland

# Global Tuna Fisheries Data

**3,060,000**
tonnes of MSC engaged catch*

**2,840,000**
tonnes of MSC certified catch

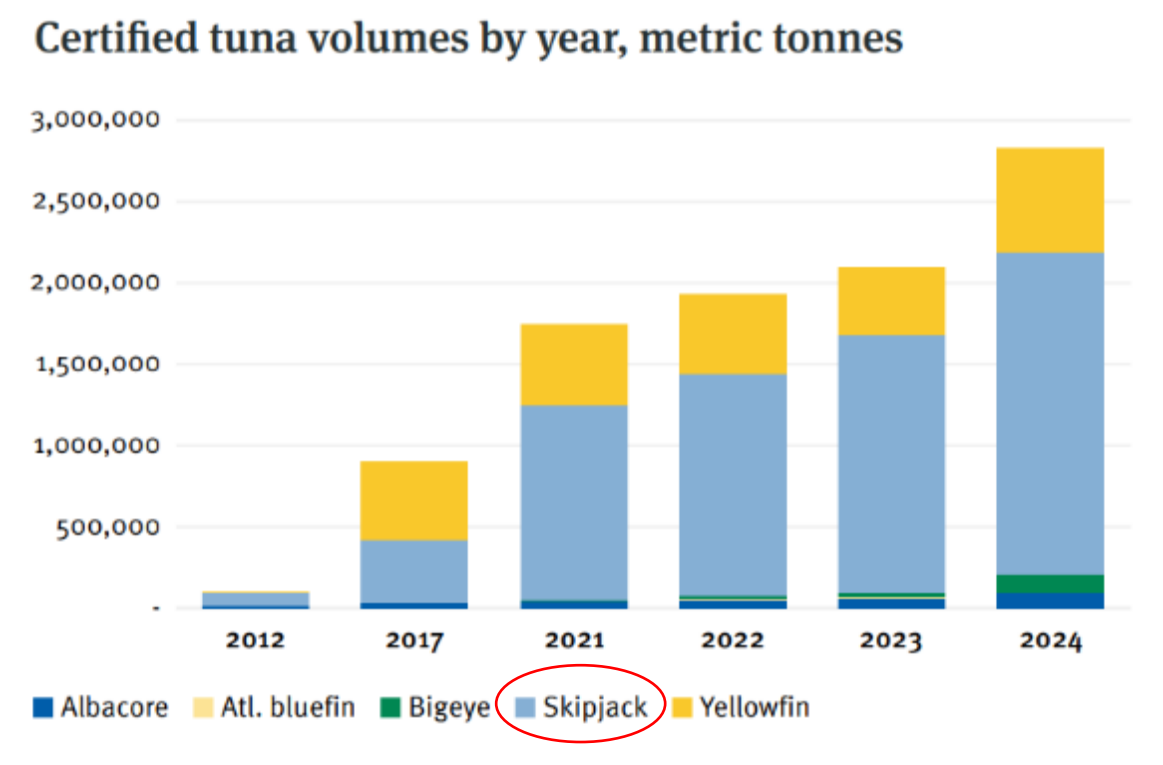
**59%**
of global wild tuna catch from MSC engaged fisheries**

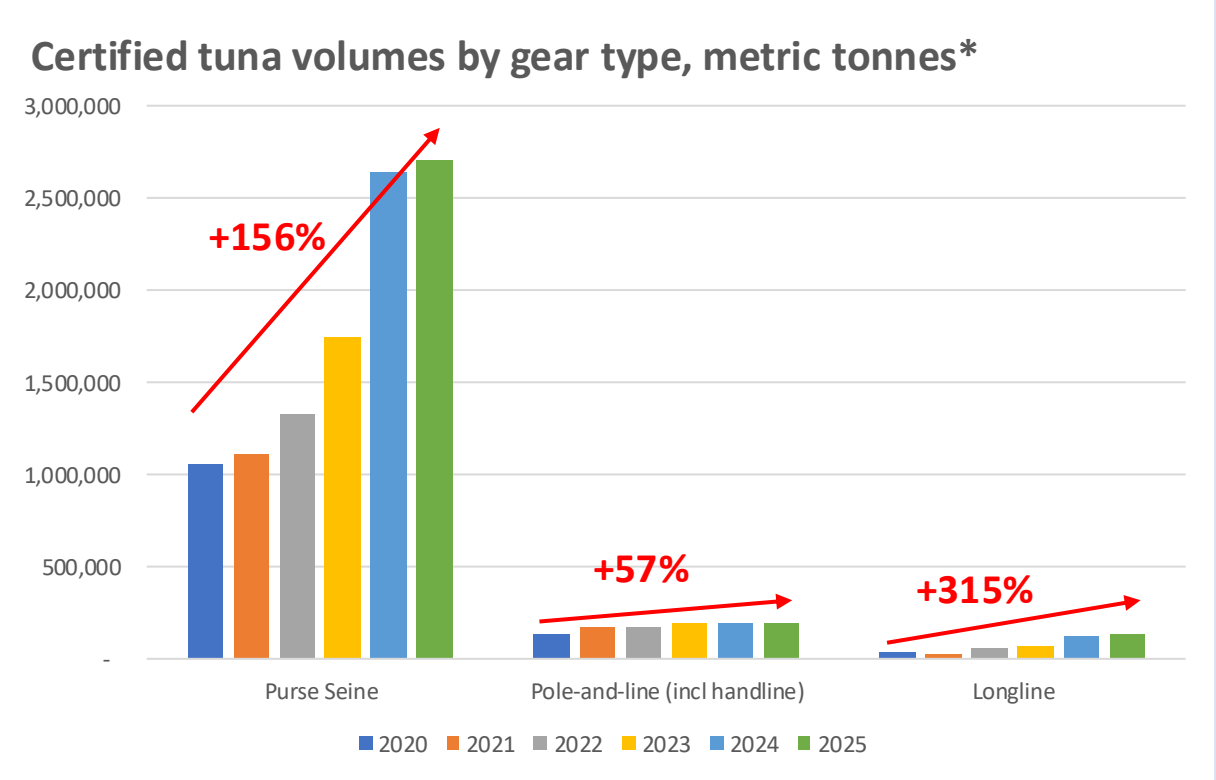
**55%**
of global wild tuna catch from MSC certified fisheries**

* Engaged means certified, in assessment , in the MSC Improvement Program or suspended
** As per UN FAO data, 2025.
MSC tuna figures as of June 2025

Tuna fishing © Tunacons

# Global Tuna Fisheries Data

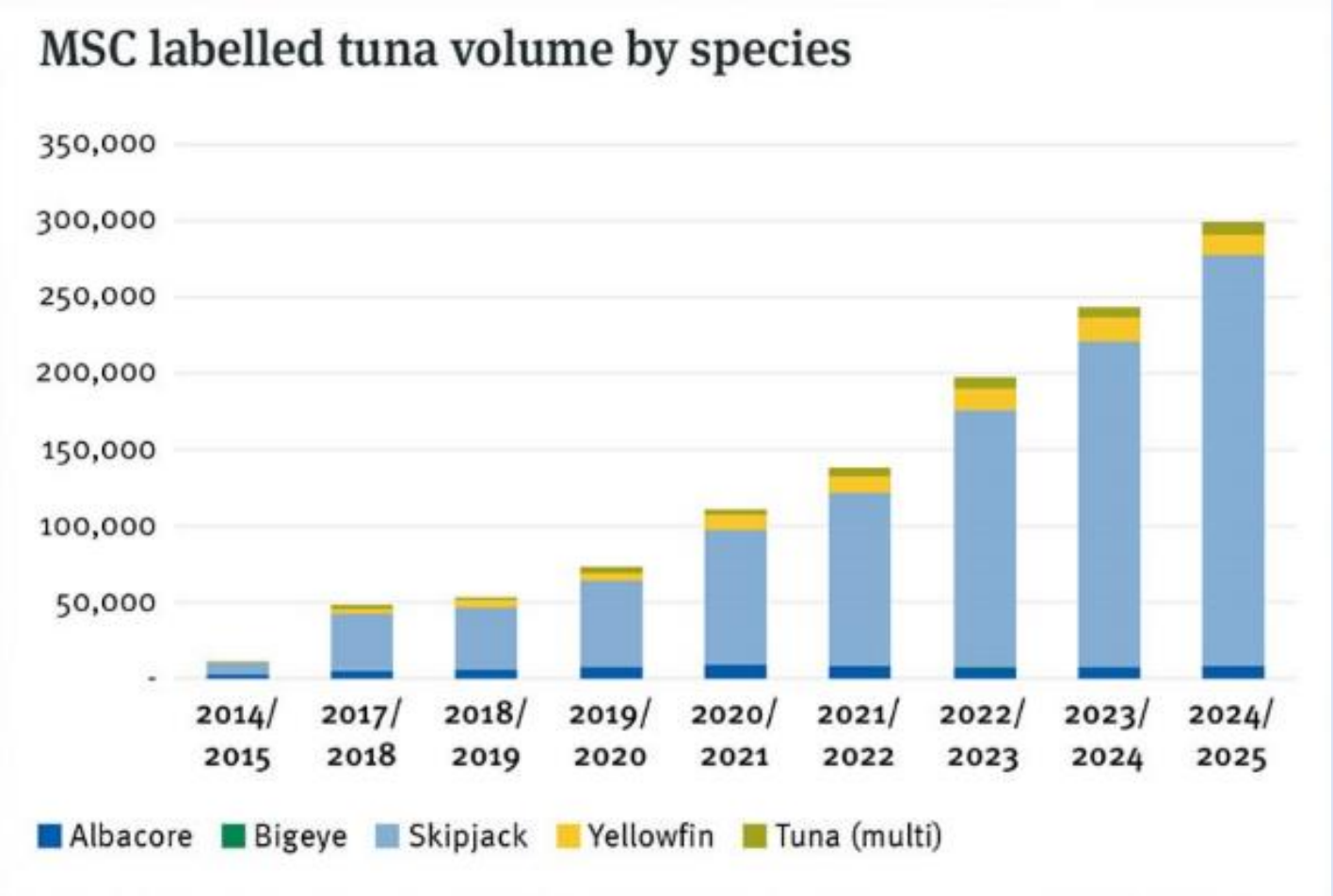



*Certified sources in all 4 oceans*

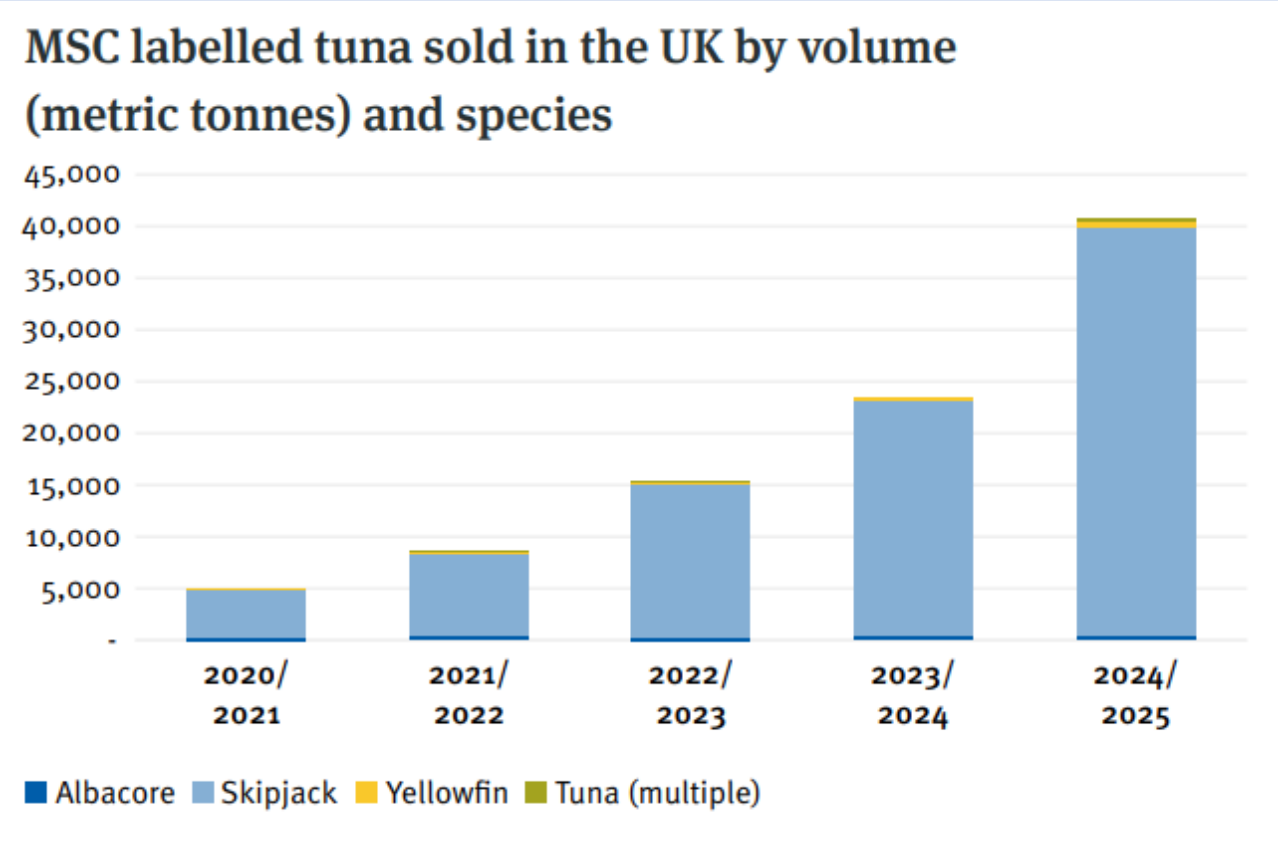
*Note: does not include all gear types used to catch certified tuna

# Global Market Data




**2025/26 forecast is 413,000t**

# MSC Certified Tuna in the UK

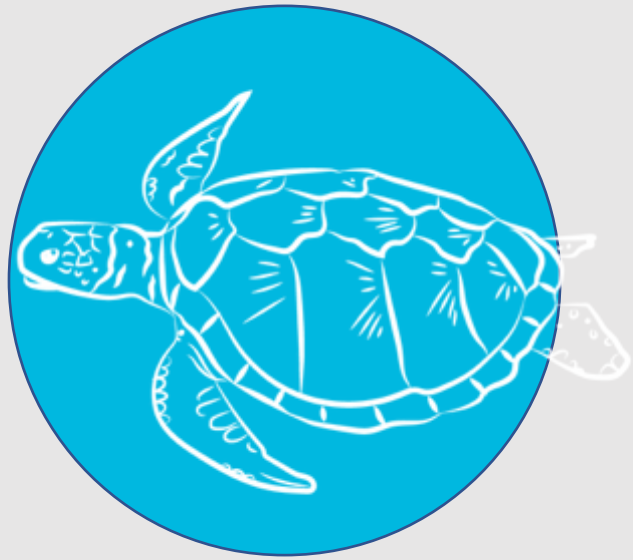




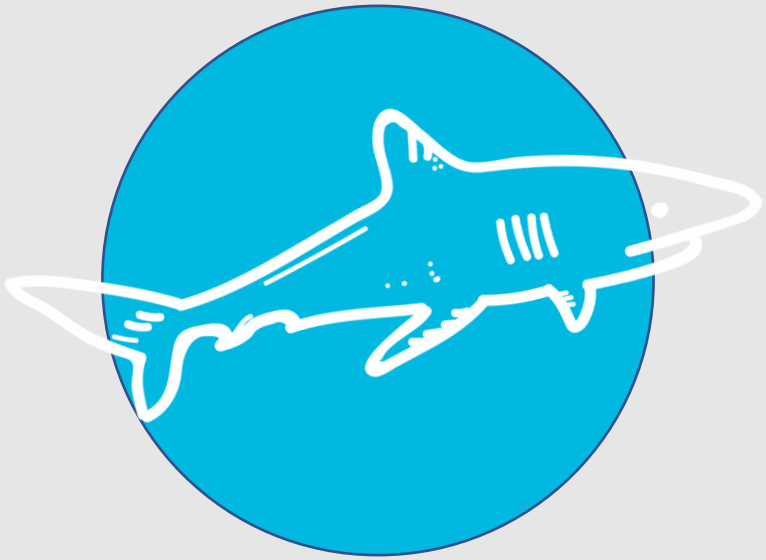
**2025/26 forecast is 75,700t**

# Impact on the water

# Evolution of MSC Fisheries standard



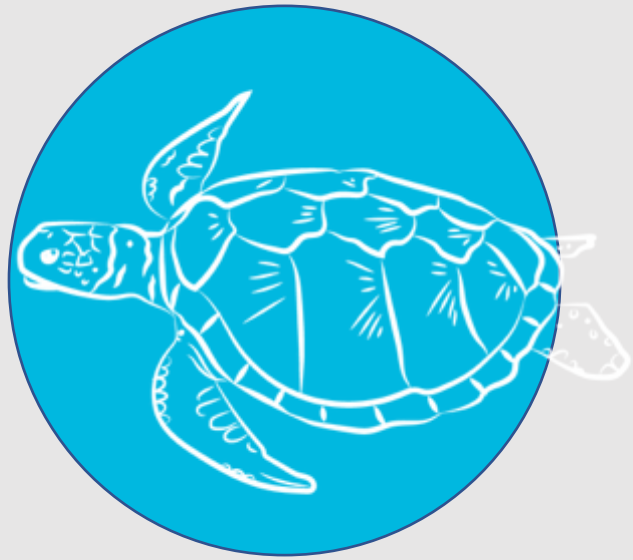
New approach to defining and assessing endangered, threatened and protected species



Fins Naturally Attached policy

Strict new requirements for evidence

# Evolution of MSC Fisheries standard



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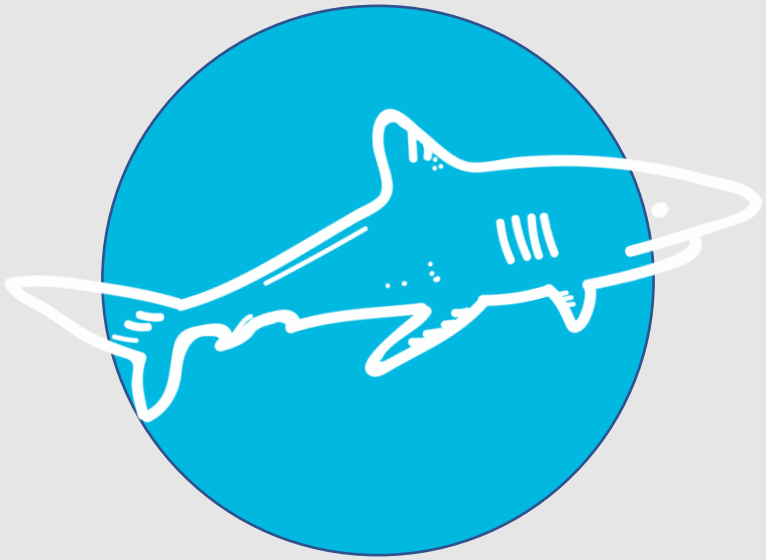


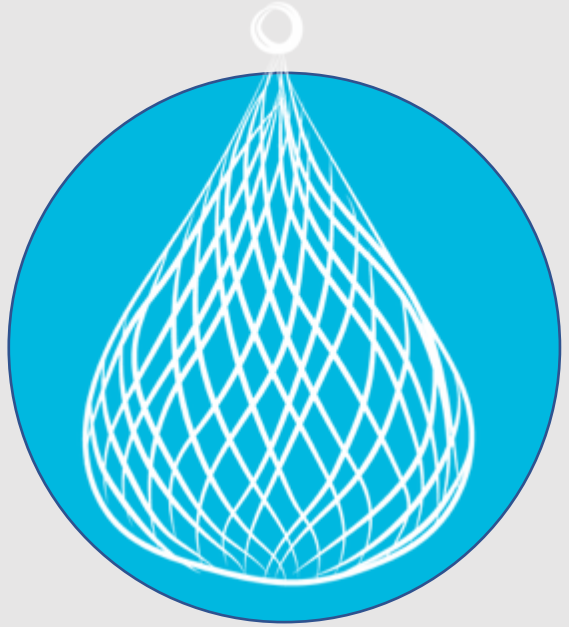
Fins Naturally Attached policy

Strict new requirements for evidence

# Evolution of MSC Fisheries standard

Clearer and more consistent assessment of habitats and ecosystems

Improvements to Risk-Based Framework



Minimising lost and discarded fishing gear

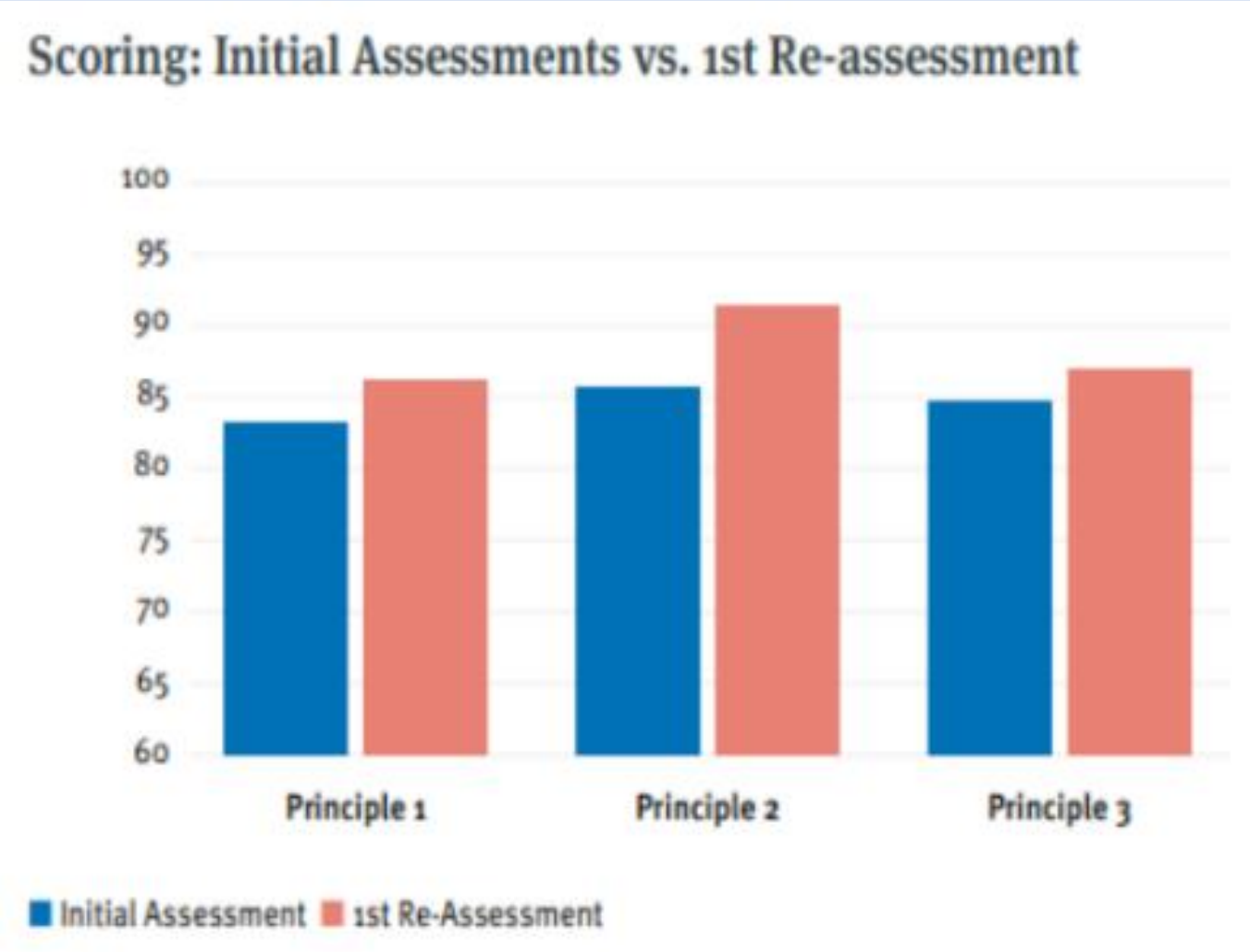
# Evolution of MSC Fisheries standard

All Fishing methods in the UoA

Incentivising adoption of harvest strategies

# Impact on the Water

# Scoring analysis: Improving Performance



# Compilation of fisheries improvements

# Progress of tuna fisheries

- Biodegradable non –entangling FADs
- Reduction in bycatch
- Improved data collection
- Development of mechanisms for handling and release of bycatch specimens
- Survival studies through satellite tagging
- Better management including progress towards state of the art harvest strategies

# Progress on the water

**203**

**tuna fisheries now engaged in the MSC programme**

**155**

**improvements over the last three years by certified tuna fisheries:**

**59**

**for stock status and harvest strategies**

**48**

**for endangered, threatened and protected species, and reducing bycatch**

**25**

**for fishery management, governance and policy**

**23**

**for ecosystems and habitats**

*Data correct as of 31 March 2025

# Impact on the Water

# Case Study: TUNACONS

## Certification Journey

**2016**: Pre-assessment conducted and action plan develop

**2017**: FIP launched

**2022**: Yellowfin achieves MSC certification

**2023**: Scope extension to include skipjack successful

**2023:** MSC OSF grant to improve understanding of silky shark survival rates and to identify strategies to reduce mortality.

**2025**: Scope extension to include bigeye successful


| LATEST PRINCIPLE SCORES | Ecuador | | Panama | | USA | | |
|---|---|---|---|---|---|---|---|
| | Free School | FAD Set | Free School | FAD Set | Free School | FAD Set | Small-Fleet |
| Principle 1 (P1) – Target Species | 85.0/100 | | | | | | |
| Principle 2 (P2) – Ecosystem Impacts | 84.7/100 | 81.3/100 | 84.7/100 | 81.3/100 | 84.7/100 | 81.3/100 | 82.0/100 |
| Principle 3 (P3) – Management System | 84.6/100 | | 90.3/100 | | 87.7/100 | | |

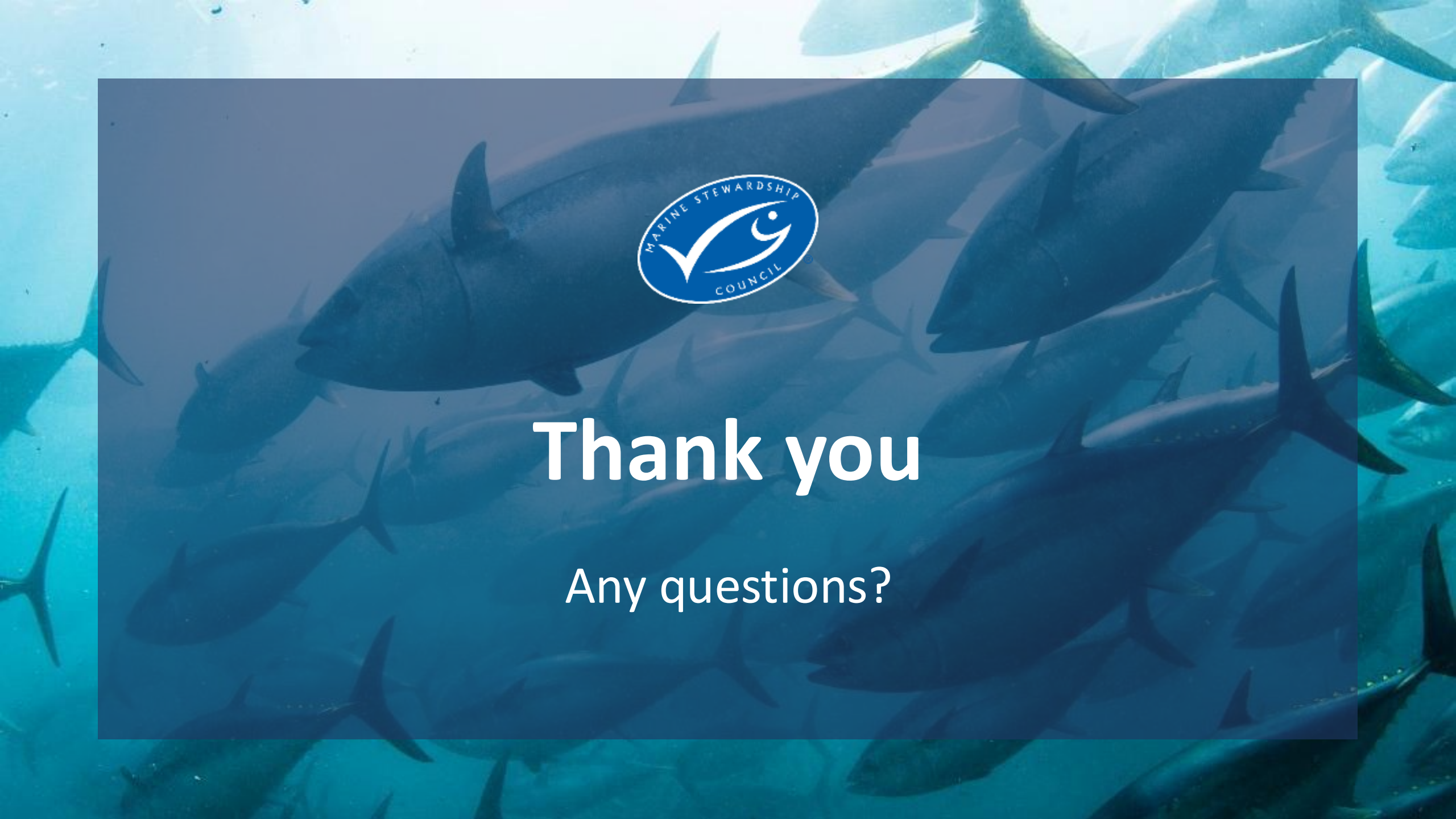
# Myths or reality?

Go to www.menti.com

**Code: 3893 9745**

# Myths or reality?

1. Can all tuna gear types and fishing methods be MSC certified? (T/F)
2. The MSC Standard requires fisheries to limit the number of FADs they deploy? (T/F)
3. Is yellowfin tuna in the Indian Ocean being overfished? (T/F)
4. There are MSC certified sustainable sources of bluefin tuna? (T/F)
5. UK consumers are more likely to choose tuna with a trusted ecolabel than one without? (T/F)




# Thank you

Any questions?

Sustainable Fisheries
PARTNERSHIP

# Tuna Sustainability Progress & Market Confidence Forum

November 2025

# Ian Rolmanis

## Global Markets & Industry Leadership Director

Coordinates & oversees SFPs global partnerships and tools we use with the seafood industry for improvements in global seafood and aquaculture supply chains.

Educated in Fishery Management and Aquaculture with nearly 30 years experience in various seafood related supply chains in different parts of the world. Currently based near London, UK.

Sustainable Fisheries™
PARTNERSHIP

# Who Are SFP?

NGO, Founded in 2006, exclusively remote organization with more than 60 expert and specialist staff based all around the world.

Scientists, marine biologists, policy and markets experts, analysts and data specialists, and professionals in communications, fundraising, systems, and operations

# What we do

We bring industry, NGOs, governments, fishers, scientists, and academics to the table together.

And then we provide tools to jointly find solutions that benefit nature, industry and people.

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# Our Mission & Vision

Our VISION is one of healthy marine and aquatic ecosystems, where 100 percent of the world's seafood is produced sustainably and responsibly.

Our MISSION is to engage seafood supply chains globally to rebuild depleted fish stocks, reduce the environmental impacts of fishing and fish farming, and ensure sustained economic opportunities for fishing communities worldwide.

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# Our strategy for change

Instead of abandoning problem fisheries, we should support them to improve their practices.

We engage stakeholders throughout the supply chain, from artisanal fishers to large-scale retailers, to foster the sustainability and resilience of the entire global seafood system,
through continuous, dynamic change.

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# Collaborative Change

Supporting/working/collaborating with others:

- Foundations
- NGOs
- Implementers
- Associations
- Pre-competitive platforms
- Certification bodies
- Fishers
- Mid-supply Chain
- Retailers

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# SFP Partners

Our corporate/supplier partners actively drive change in their supply chains.

SFP partners share our vision of a world where all seafood is sustainably and responsibly produced, and recognize the business, environmental, and social value of achieving this goal.

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Sustainable Fisheries PARTNERSHIP

# SFP Partners

30+ corporate partners in 15+ countries.

Sustainable Fisheries PARTNERSHIP

# Tools & Services (available to everyone)

FISHSOURCE

seafood Metrics

Ocean Disclosure Project

FISHSOURCE

## Curious about the sustainability of your seafood?

**Public** - Impartial, actionable information on fisheries and aquaculture regions, translating science into easily interpretable scores to evaluate your seafood.

https://www.fishsource.org/

seafood metrics

# Sustainability Intelligence for the Seafood Industry

**Private** - A data-driven tool that can help your company more fully understand the level of sustainability risk in your source fisheries, both wild-caught and farmed.

# Ocean Disclosure Project

## Want to show your commitment to sustainable seafood?

**Public** - The ODP allows your business to disclose key information about your seafood sourcing practices.

https://oceandisclosureproject.org/

# SFP Advisory Services

SFP tools are available to EVERYONE as a trusted source for companies looking to support sustainable fisheries.

We can help you:

- Understand the sustainability of your sources
- Identify needed improvements
- Monitor and report progress
- Engage stakeholders
- Showcase impact

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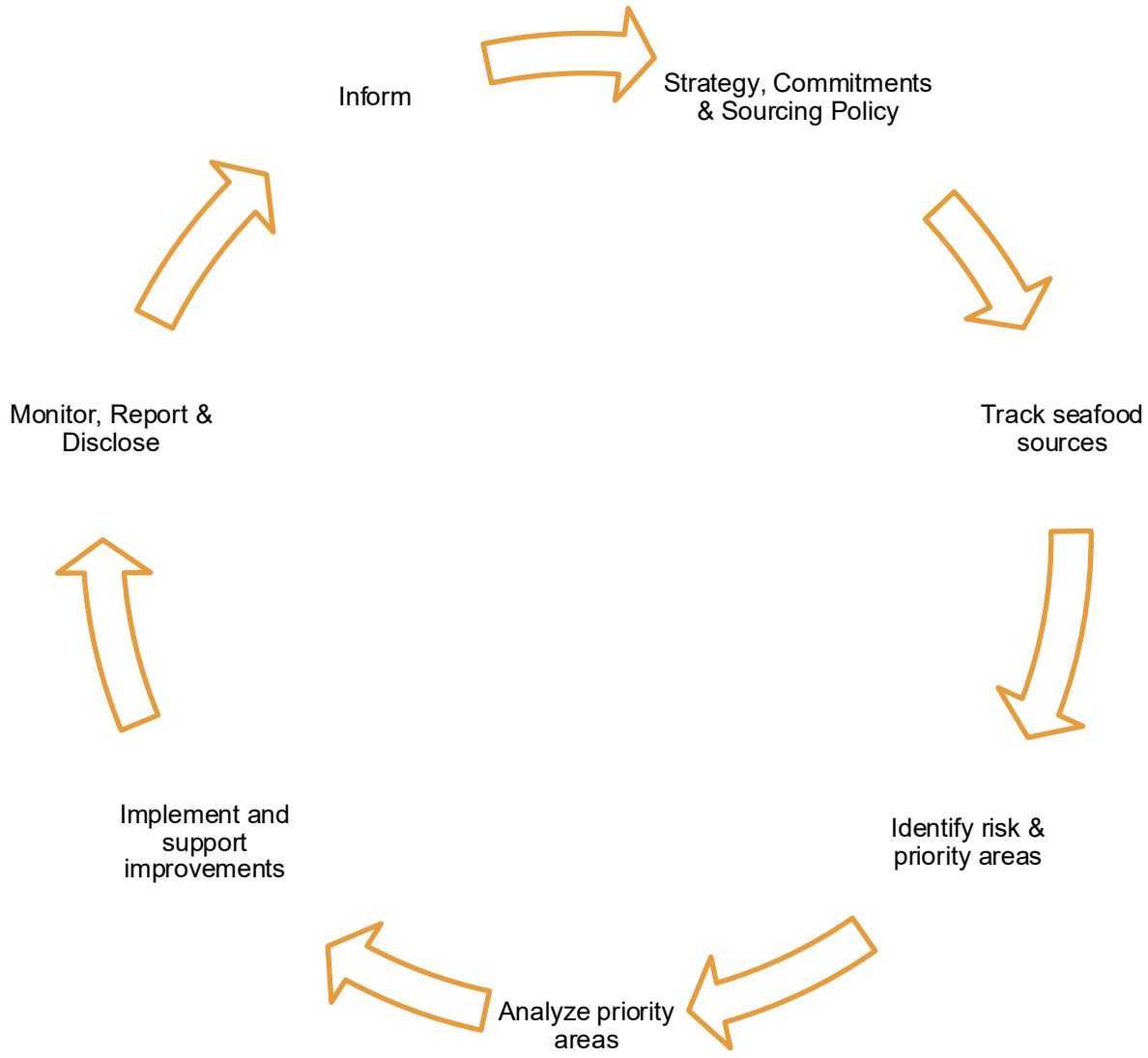
# “Closing the Loop”




Sustainable Fisheries™ PARTNERSHIP

Strategy, Commitments & Sourcing Policy

Track Sources and Identify Risk & Priority Areas

Analyze Priority Areas

Sustainable Fisheries PARTNERSHIP

seafood metrics

Sustainable Fisheries PARTNERSHIP

PROTECTING OCEAN WILDLIFE

FISHSOURCE

Global Fishing Watch



Sustainable Fisheries PARTNERSHIP

Implement and support Improvement efforts

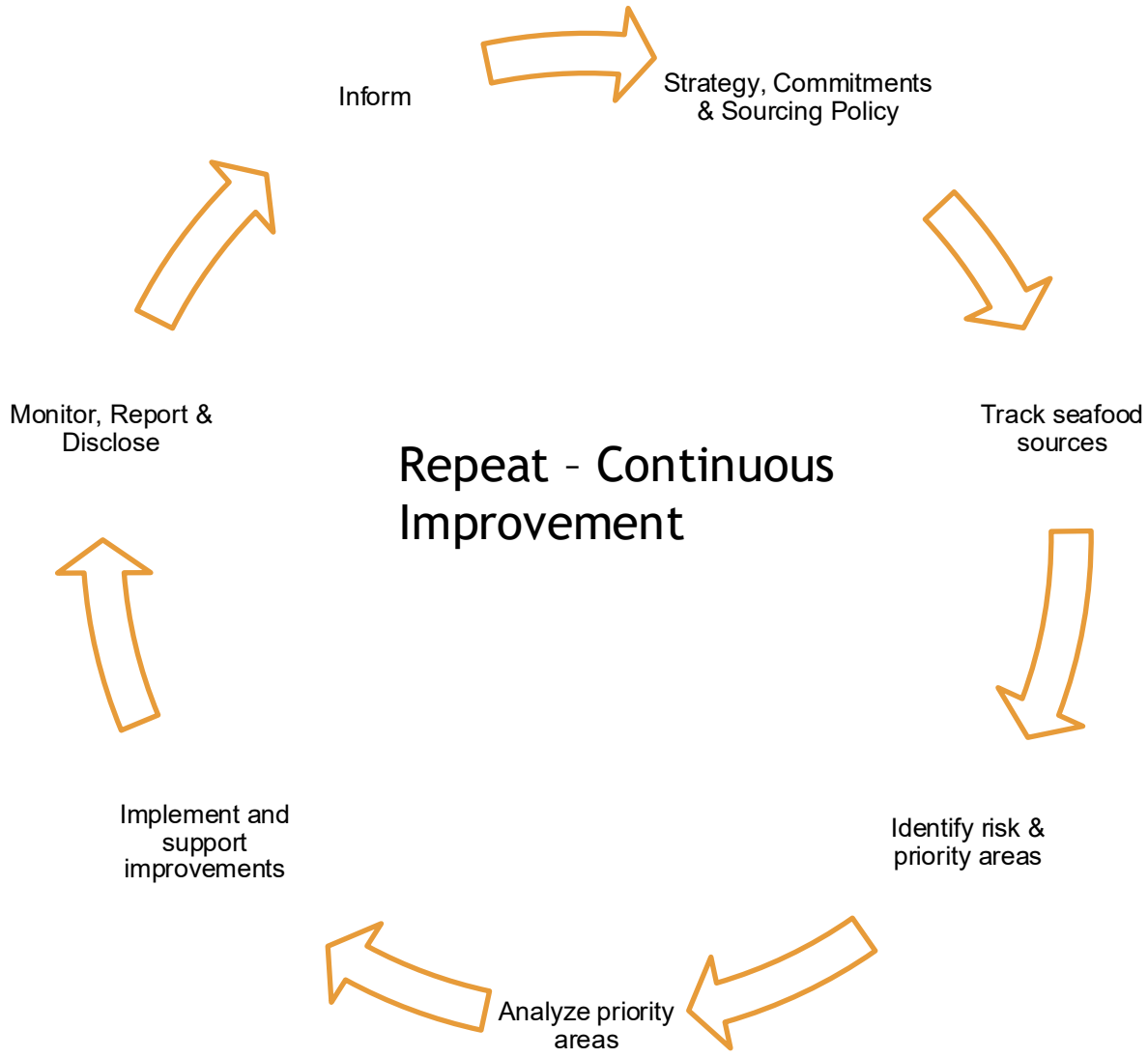
Monitor, Report & Disclose

Inform & Re-evaluate




Sustainable Fisheries PARTNERSHIP

# “Closing the Loop”




Sustainable Fisheries PARTNERSHIP

# Dr Alexia Morgan

## Ocean Wildlife Manager, North America

Responsible for implementing programs to reduce the numbers of marine endangered, threatened, and protected (ETP) species harmed by fishing activities.

This work is achieved by catalyzing the seafood supply chain to implement measures to reduce these impacts, such as requiring the use of best practice bycatch mitigation measures. In addition, Alexia conducts and coordinates supply chain bycatch audits for SFP partners and other major seafood buyers.

Currently based Belfast, Maine, USA.

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# SFP & ISSF

SFP's Alexia Morgan on the ISSF Environmental Stakeholder Committee (ESC)

SFP & ISSF participate on the NGO Tuna Forum

ISSF provides:

- valuable science-based research, analysis and innovation to address key priorities in continuous improvement of tuna fisheries
- transparent tools to help market partners advance, track and report progress to implement best practices

Sustainable Fisheries
PARTNERSHIP

# Impact Areas

# *Protecting Ocean Wildlife and Marine Habitats*

# Protecting Ocean Wildlife

Bycatch in marine fisheries is a major threat to endangered, threatened, and protected species.

PROTECTING OCEAN WILDLIFE

## What is bycatch?

The capture of non-target species, such as sharks, marine mammals, sea turtles, and seabirds during fishing.

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# Protecting Ocean Wildlife

## There are solutions to mitigate bycatch

PROTECTING OCEAN WILDLIFE

- Adoption of best fishing practices
- Increased monitoring
- Gear innovation & development of new technologies

**But how do you know if the solutions are implemented in your supply chain?**

Sustainable Fisheries PARTNERSHIP


# Protecting Ocean Wildlife *in Tuna Fisheries*

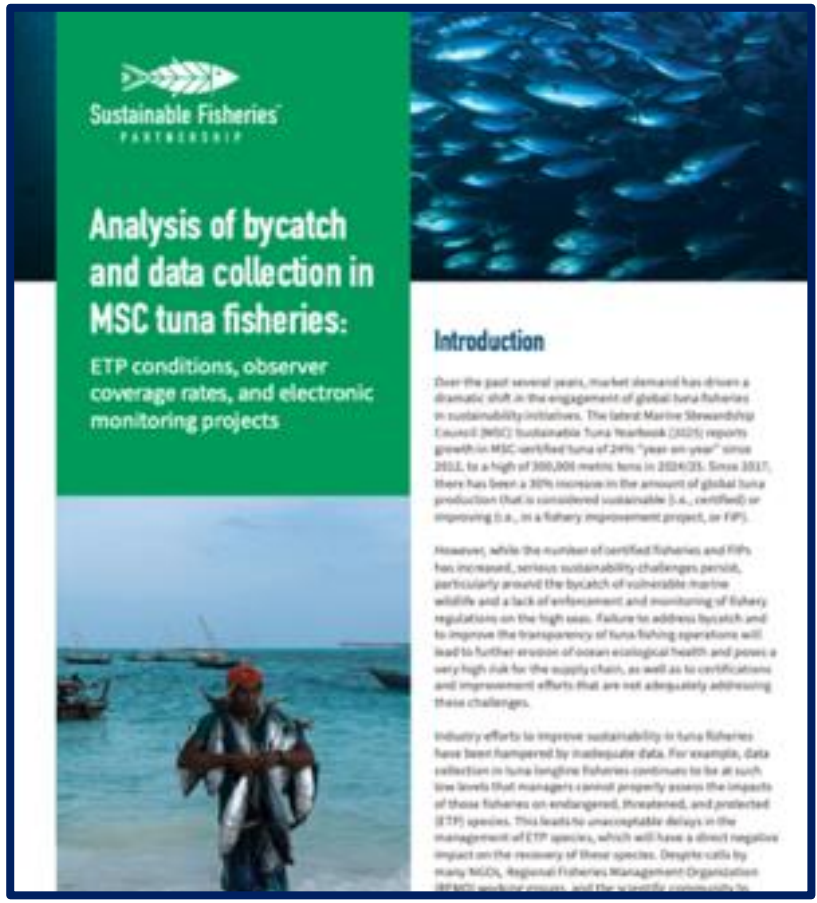
Over the past several years, market demand has driven a dramatic shift in the engagement of global tuna fisheries in sustainability initiatives.

- The latest MSC Sustainable Tuna Yearbook (2025) reports growth in MSC-certified tuna of 24% “year-on-year” since 2012, to a high of 300,000 metric tons in 2024/25.
- In tandem, The Nature Conservancy’s Tuna Transparency Pledge (TTP) has driven interest in improving observer coverage and monitoring in tuna fisheries.


# Protecting Ocean Wildlife *in Tuna Fisheries*

To support SFP partners and major tuna buyers with meeting commitments to MSC and TTP, and driving continuous improvement in tuna fisheries, SFP did a "baseline" analysis of:

- How ETP bycatch is addressed in certified tuna fisheries (Principle 2)
- Observer coverage rates




# Protecting Ocean Wildlife *in Tuna Fisheries*

The report found that 57 out 60 Marine Stewardship Council (MSC)-certified tuna fisheries (at the time of the analysis) were certified with ETP (P2) conditions

While SFP focused on Principle 2 for this briefing, ISSF have conducted analysis of Principles 1 and 3 for tropical tuna species. The ISSF report found that:

- 12 of the 23 stocks achieved a passing score for Principle 1
- Principle 3 scores varied by Regional Fisheries Management Organization

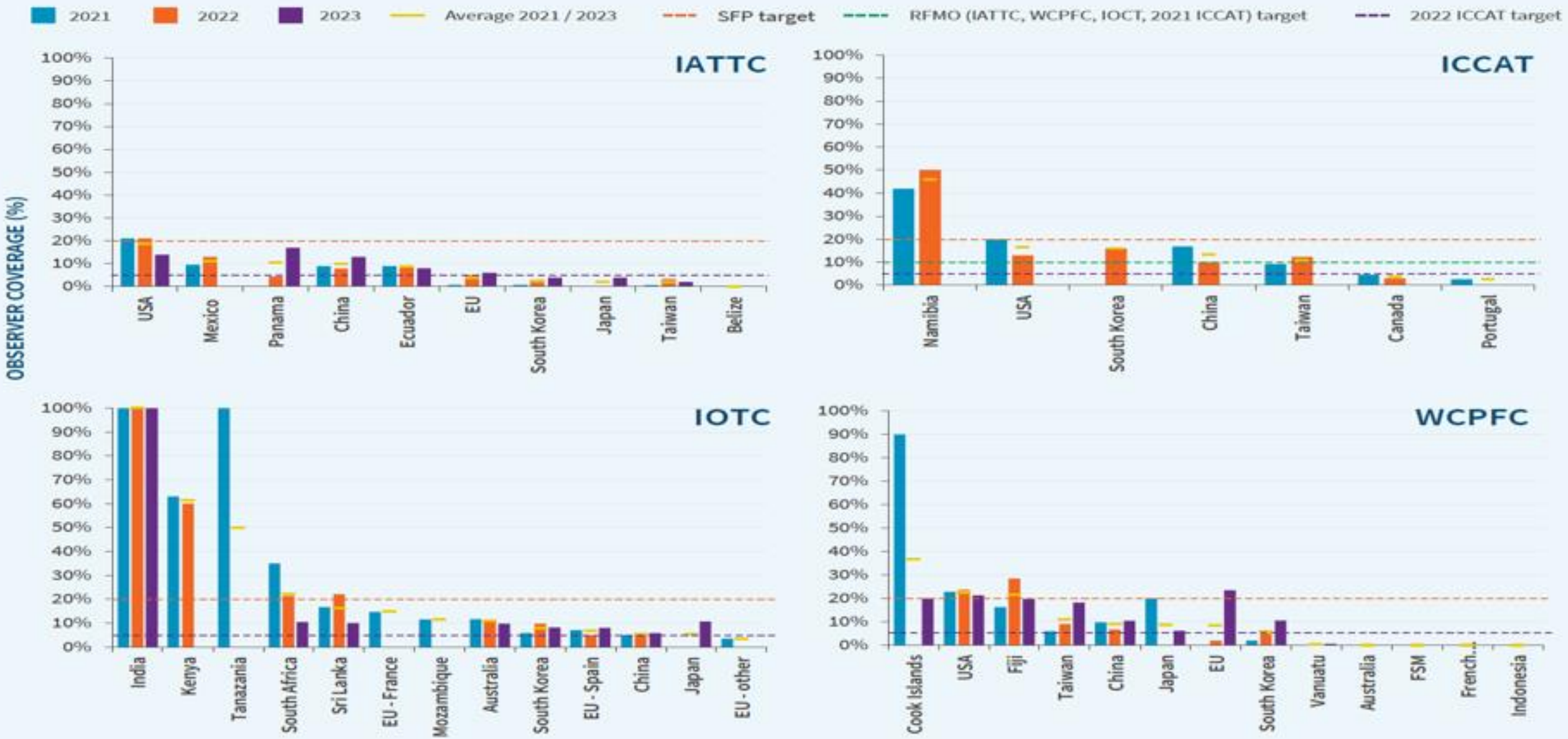

# Protecting Ocean Wildlife *in Tuna Fisheries*

**Observer coverage** information was very difficult to find, particularly about electronic monitoring (EM) implementation.

In many cases (in all oceans) observer coverage rates were below RFMO mandated rates of 5-10% and most were well below target rates of 20% (combined human and electronic), and the TTP goal of 100%

***Figure 2*** | Percent observer coverage by fishing fleet within each of the four RFMOs considered in the current study, for 2021, 2022, 2023, and 2021/23 average.

*Note: Only countries with publicly reported observer coverage rates were included.*




FISHSOURCE

seafood metrics

# Protecting Ocean Wildlife *in Tuna Fisheries*

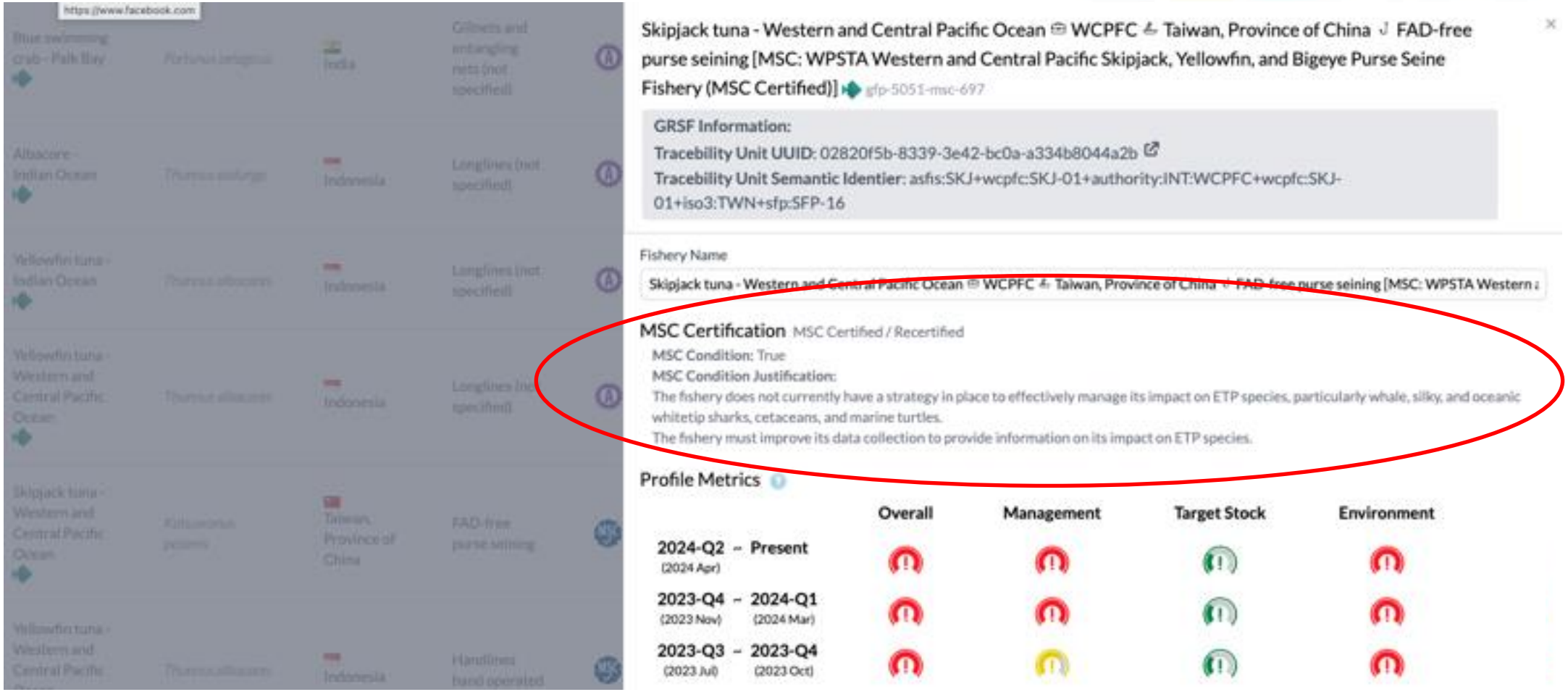
SFP has added conditions and observer coverage data into our tools, allowing for easy identification of these risks in fisheries in your supply chain

# Tools & Services

FISHSOURCE


# Tools & Services

seafood Metrics



Skipjack tuna - Western and Central Pacific Ocean WCPFC Taiwan, Province of China FAD-free purse seining [MSC: WPSTA Western and Central Pacific Skipjack, Yellowfin, and Bigeye Purse Seine Fishery (MSC Certified)] gfp-5051-msc-697

GRSF Information:
Tracebility Unit UUID: 02820f5b-8339-3e42-bc0a-a334b8044a2b
Tracebility Unit Semantic Identier: asfis:SKJ+wcpfc:SKJ-01+authority:INT:WCPFC+wcpfc:SKJ-01+iso3:TWN+sfp:SFP-16

Fishery Name

Skipjack tuna - Western and Central Pacific Ocean WCPFC Taiwan, Province of China FAD-free purse seining [MSC: WPSTA Western

MSC Certification MSC Certified / Recertified

MSC Condition: True
MSC Condition Justification:
The fishery does not currently have a strategy in place to effectively manage its impact on ETP species, particularly whale, silky, and oceanic whitetip sharks, cetaceans, and marine turtles.
The fishery must improve its data collection to provide information on its impact on ETP species.

Profile Metrics

| | Overall | Management | Target Stock | Environment |
|---|---|---|---|---|
| 2024-Q2 – Present (2024 Apr) | | | | |
| 2023-Q4 – 2024-Q1 (2023 Nov) (2024 Mar) | | | | |
| 2023-Q3 – 2023-Q4 (2023 Jul) (2023 Oct) | | | | |


# Protecting Ocean Wildlife *in Tuna Fisheries*

- Requires transparency to <u>vessels</u> in your supply chain
  - Collect vessel lists from suppliers
  - Use MSC vessel lists as a proxy

- You can then capture baseline of implementation on vessels of:
  - EM/observer coverage
  - Bycatch mitigation practices

# Utilizing ISSF Data

**No need to recreate the wheel!**
SFP is incorporating ISSF data into our platforms:

ISSF already provides valuable transparency & accountability tools at the supplier and vessel-level through the VOSI, a public, audited platform.

- Includes EM and observer coverage, bycatch mitigation implementation, skipper training, compliance with conservation measures, etc.
- **Aligns perfectly with market needs for credibly verifying implementation, and SFP's approach of continuous improvement**

# Vessel Level Transparency

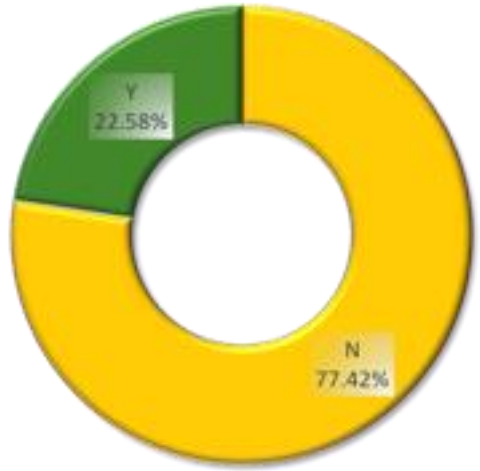

**Tuna Sustainability Dashboard on Seafood Metrics – *Coming Soon!***

- Combining fisheries-level and vessel-level assessments
- Catalyze awareness of activity below fisheries level at larger scale
- ID areas of improvement to drive best practices in fleets
- Drive more vessel reporting on VOSI

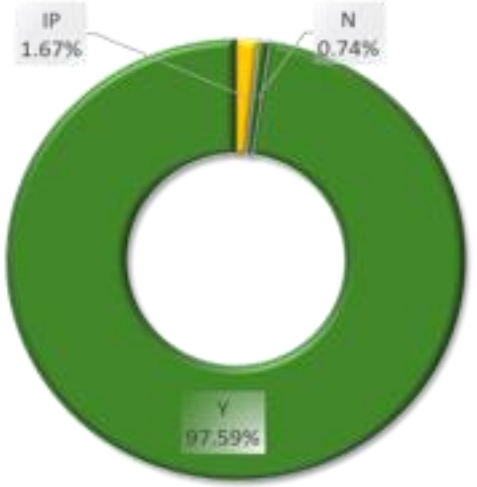
Categories of assessment:

- Sustainable fishing practices (ISSF)
- Vessel activity risks (GFW)

Electronic Monitoring




FAD Management Policy



Sample Analysis:

- 159 total vessels: 58 LL, 101 PS

Initial insights:

- Purse seine vs Longline ISSF uptake
- Highlights the need for EM
- Risk indicators across longline fleet
- Complement of ISSF and GFW data
- Encourage more vessels to participate in VOSI

We are in the pilot phase and determining what information is most useful to buyers and how best to display it.

| Indicator | LL | PS |
|---|---|---|
| ISSF Listing | 65% | 100% |
| In an MSC Certified Fishery | 95% | 100% |
| EM | 2% | 8% |
| Observer | - | 100% |
| NE FADs | - | 100% |
| FAD Mgmt Policy | - | 100% |
| Sharks, Turtles, Seabirds | 61% | - |
| Shark Finning Policy | 63% | 100% |
| Met AIS thresh. for GFW Analysis? | 83% | 40% |
| IUU listed | 0% | 0% |
| Unauthorized RFMO FE | 35% | 1% |
| No-Take MPA FE | 0% | 0% |
| AIS Off event | 29% | 88% |
| Potential transshipment at sea | 40% | 8% |


# Vessel Level Transparency

***Major buyers can help to make this process effective and efficient by:***

- Encourage MSC to make information on conditions more transparent and readily available

- Advocate to RFMOs for more transparency in observer coverage and adoption of frameworks for EM implementation, HCRs, etc.

***Drive Continuous Improvement:***

Encourage suppliers to encourage vessels to participate on the VOSI, which enables monitoring of continuous improvement toward:

- Adoption of EM, bycatch mitigation best practices, participation in skipper workshops, FAD policies, etc.


BYCATCH SOLUTIONS HUB™

FOUNDING SPONSOR

PURINA®

When bycatch mitigation and monitoring are found to be missing, SFP wanted to be prepared to help industry find and access solutions.

Bycatch mitigation best practices are available, just not often implemented effectively and at scale.

# BYCATCH SOLUTIONS HUB™

FOUNDING SPONSOR

PURINA®

Launched in 2023, the Hub is curated for the seafood industry, and meant to bridge the gap between the industry and efforts to reduce bycatch by gear manufacturers, NGOs, etc., while also providing a tangible means to support for projects working to implement bycatch solutions.

To date, the Hub has funded 17 projects totaling over 784,000 USD, including over 100,000 USD to tuna specific projects!

BYCATCH SOLUTIONS HUB™

Tuna projects include:

- Non-entangling Biodegradable Fish Aggregating Devices in the Tuna Purse Seine Fishery

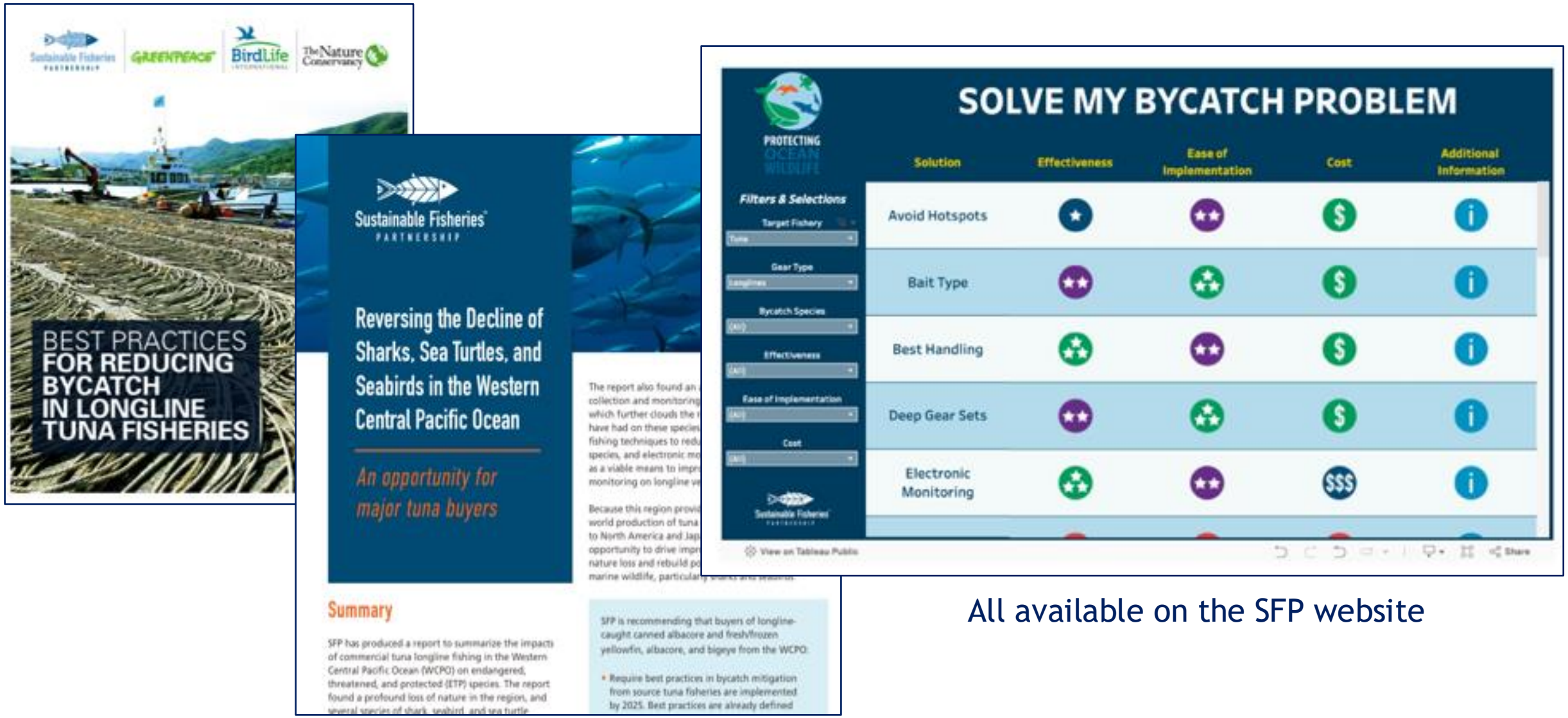
Through a collaboration with ISSF, this funding opportunity provides workshops to participating vessels to develop region-specific jelly FADS. Crews will be trained on how to construct, deploy, and test the jelly FADs. Jelly-FAD deployments will then be monitored by fishers, who will record data on the performance of the jelly-FADs at sea (e.g., entanglement of ETP species) and provide feedback to ISSF to further improve bio-FAD designs. Jelly-FAD will be monitored for up to 11 months after deployment.

PURINA®

And also…

- Smart Buoys for the Experimental Swordfish and Tuna fishery
- EM installation in Costa Rica Tuna and Mahi fisheries (with TNC)
- Hookpod trial with a longline vessel in the WCPO Tuna fishery

# Other SFP Tools & Reports




All available on the SFP website


Thank you!
Questions?
Sustainable Fisheries
PARTNERSHIP

# Activating Market Influence & Creating Strategic Value:

## ISSF Initiatives & Tools

November 14, 2025

**Michael Cohen**
ISSF Market Outreach Associate

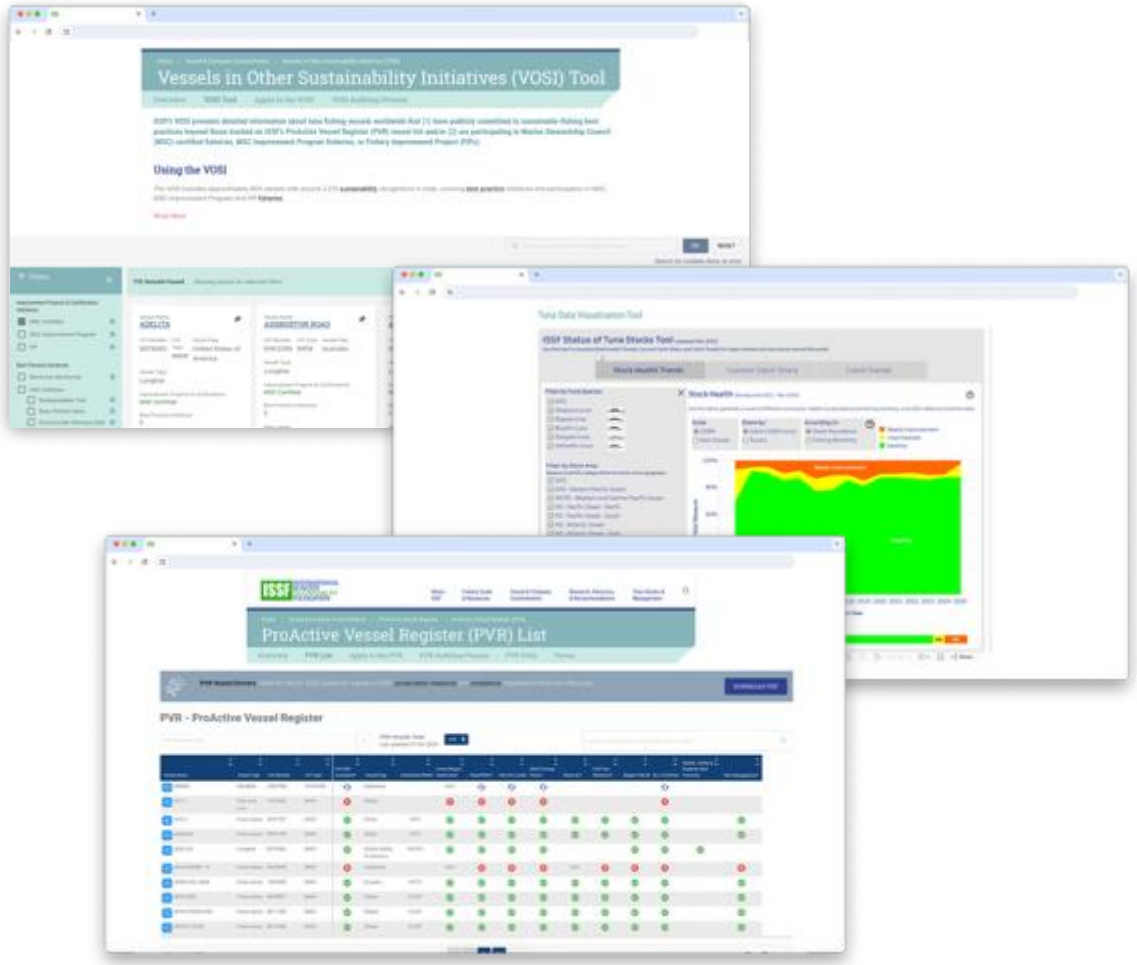
ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# ISSF Portfolio of Initiatives & Tools

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

## AN OVERVIEW

- ISSF RFMO Advocacy Program
- Status of the Stocks
- ISSF Transparency & Accountability Tools
    - ISSF Conservation Measures
    - ISSF PVR (ProActive Vessel Register)
    - ISSF VOSI (Vessels in Other Sustainability Initiatives)
- ISSF MSC & FIP Advisory Engagement
- ISSF Science Innovation & Impact Program

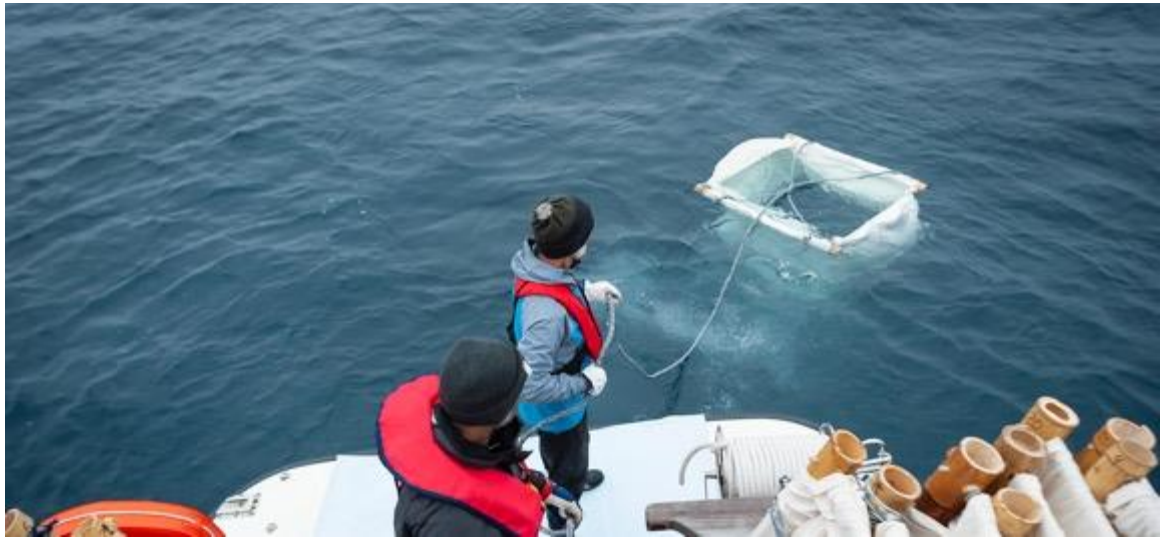


# ISSF Portfolio of Initiatives & Tools

# ISSF Portfolio of Initiatives & Tools

## DRIVING TUNA SUSTAINABILITY PROGRESS

- Advances expert understanding of tuna sustainability
- Innovates, develops and promotes implementation of solution-focused best practices
- Strengthens RFMO management of tuna
- Improves key tuna sustainability priorities:
  - Tuna Stock Health
  - Harvest Strategies
  - Mitigating IUU
  - ETP Bycatch Reduction
  - FAD Management
  - Marine Ecosystem Health
  - Observer Coverage (Human/Electronic)
- Fosters supplier level transparency & accountability
- Supports success of tuna fisheries engaged in MSC program and FIPs



# ISSF Portfolio of Initiatives & Tools

## CREATES STRATEGIC VALUE

- Improved stock health
- Greater availability of MSC-certified tuna fisheries…and helps maintain those that exist
- A progressive supply chain that is transparent, traceable, accountable, de-risked.
- Harmonized, verified data to enable due diligence monitoring and reporting (e.g., progress vs policy)
- Streamlined operating complexity and cost
- Enhanced trust among stakeholders…a valuable asset
- Tools can be integrated into your business practices and your NGO's sustainability partnership program
- Leverageable opportunities to demonstrate leadership and strengthen your supply chain

# ISSF Portfolio of Initiatives & Tools

*Highlights*

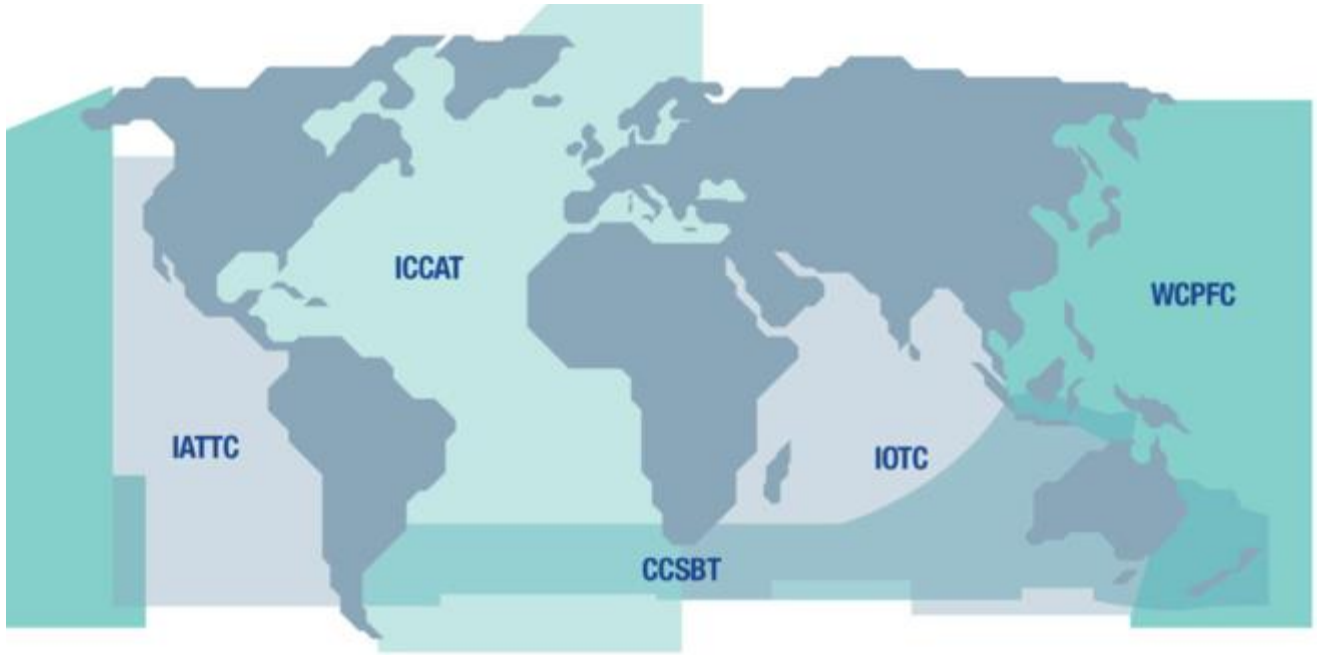
ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# ISSF RFMO Advocacy Program

## STRENGTHENING RFMO MANAGEMENT

### ISSF RFMO Advocacy Priorities

- Robust RFMO member **compliance processes**
- Implementation of rigorous **harvest strategies**
- Science-based **FAD management**
- Adoption of best practice **bycatch mitigation** for sea turtles, seabirds, sharks and rays
- Enhanced **Monitoring, Control and Surveillance (MCS) measures**
- Effective **management of fleet capacity**

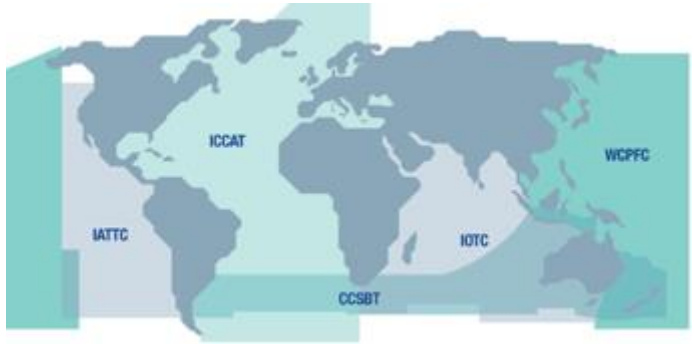


# ISSF RFMO Advocacy Program

## STRENGTHENING RFMO MANAGEMENT

**ISSF has a multi-dimensional, strategic approach.**

- ✓ **Engages with RFMO member nations.**
- ✓ **Coordinates with NGOs, Supply Chain, Fleets.**




Publish RFMO Best Practices Reports

RFMO Priorities & Position Statements

Participate in Annual Commission Science, Compliance Meetings

Pre- and Post Meeting Analysis

Serve as Experts on Working Groups, Panels.

Direct Strategic Outreach to RFMO Member Nations

Conduct RFMO Side Events

Coordinate Advocacy Efforts with NGOs

Provide tools for vessel community, MSC fisheries and FIPs

Support ISSF PCs Advocacy -Model letters & Talking points

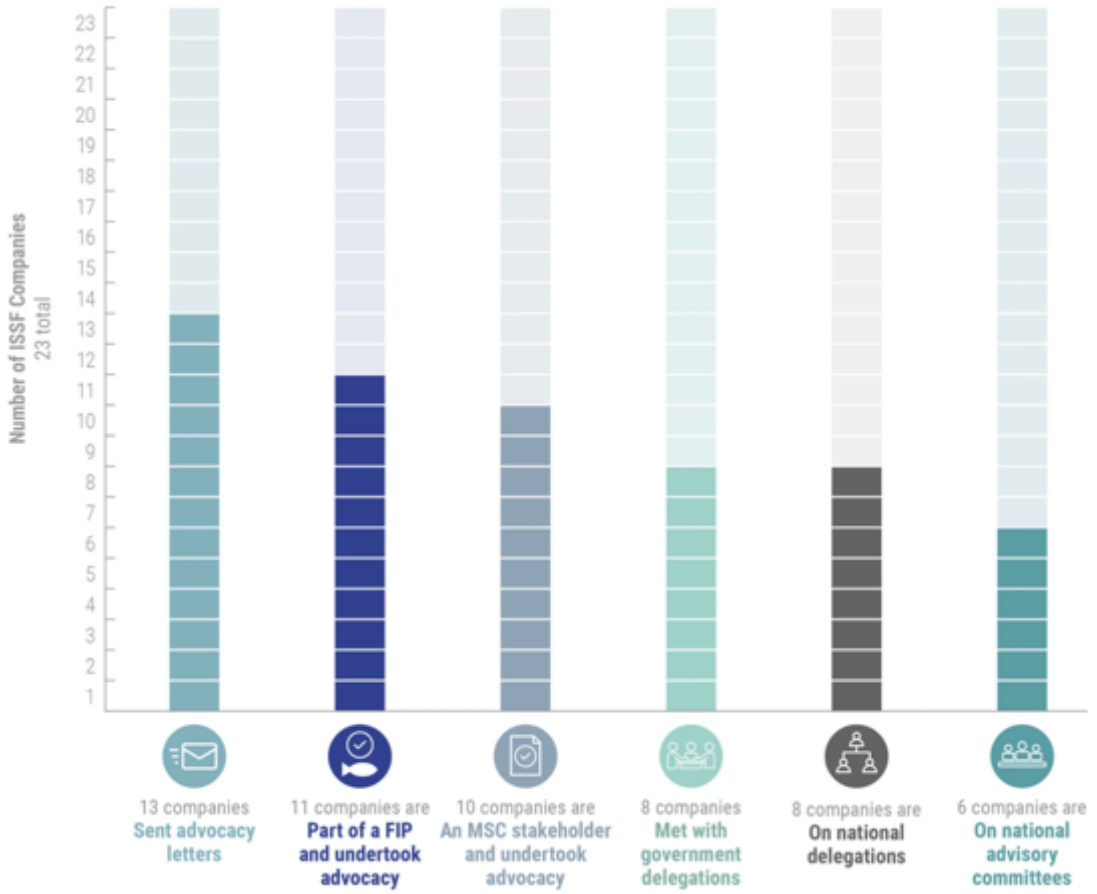
# ISSF RFMO Advocacy Program

## ISSF PARTICIPATING COMPANY ACTIVITY

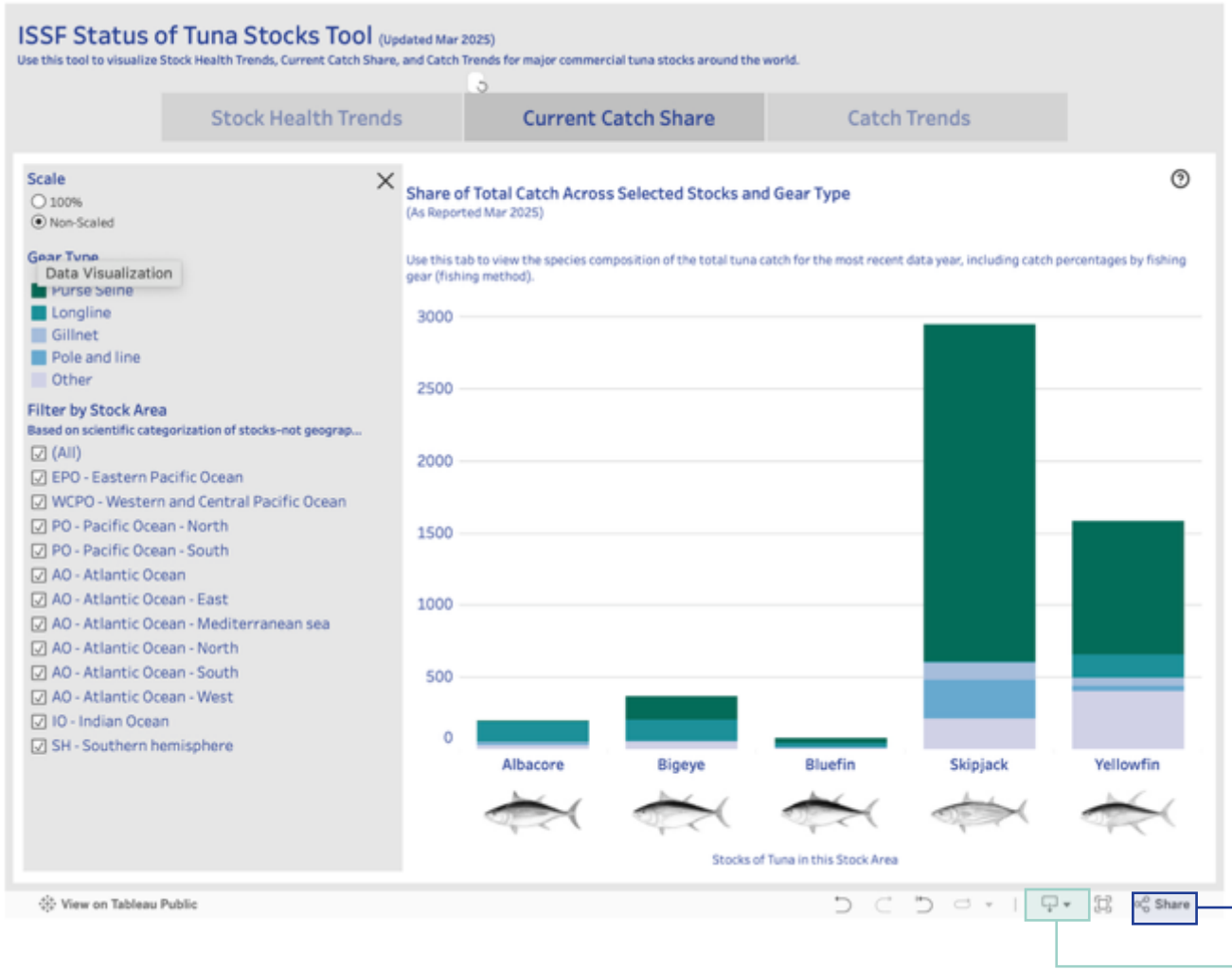
iss-foundation.org/research-advocacy-recommendations/our-advocacy-efforts/advocacy-overview/participating-company-advocacy


### Participating Company Advocacy Activities

ISSF participating companies' self-reported advocacy activities in 2024, which we do not audit, are summarized below.



# Status of the Stocks
## **Interactive Tool:** Current Species Catch Share By Gear




**Example:**

- Unscaled
- All Oceans
- All Species
- All Gears

**Try it!**

iss-foundation.org/tuna-stocks-and-management/our-tuna-stock-tools/interactive-stock-status-and-catch-tool/

Share with others

Customize how your results are downloaded

# ISSF Transparency & Accountability Tools

**Transparency & Accountability is a fundamental element of any credible, transformative sustainability policy and responsible supply chain.**

ISSF Transparency & Accountability tools support the Market and its supply chain to advance tuna sustainability and strategic operating priorities.

**The system features:**

- Clear, public commitments & measures
- Transparent assessment protocols
- Independent verification of best practice implementation
- Regular public reporting of results
- A mechanism to address incomplete conformance

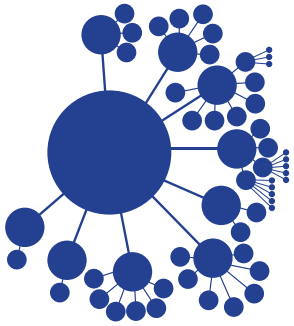
**"The call for transparency and accountability applies to every tuna fishery stakeholder, from vessel owners and fisheries managers to processors and retailers"**

**- Susan Jackson**
President, ISSF

# ISSF Transparency & Accountability Tools

## Processors

**Independent auditing** of tuna company compliance with ISSF conservation measures



30+ conservation measures across 9 categories


Individual & public company compliance reports

## Tuna Vessels

**Independent auditing** of vessel compliance with best practices on the

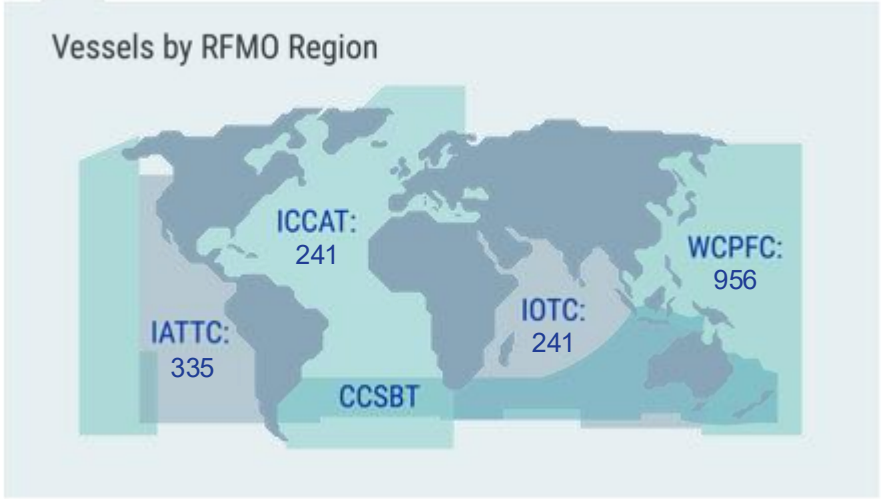
**ProActive Vessel Register** (PVR)

**Vessels in Other Sustainability Initiatives** (VOSI)

ISSF works with tuna vessels & processors **globally**

**1,750+** vessels worldwide

**24** participating companies with operations in ~80 countries



# ISSF Participating Companies

## VALUABLE SUPPLY CHAIN PARTNERS

### ISSF Participating Companies make an essential contribution to Progress

- **Fund solutions-focused science**

  Supporting research, on-the-water trials and innovations such as electronic monitoring, biodegradable FADs and best-practice training for skippers

- **Implement science-based, best practices**

  Traceability, Bycatch reduction, Vessel tracking, IUU fishing prevention, Observer coverage and more

- **Ensure independent verification**

  Undergo third-party audits with results published transparently to provide stakeholders with credible data on company performance

- **Foster transparency and recognize leadership through the supply chain**

  Supporting platforms like the ProActive Vessel Register (PVR) and Vessels in Other Sustainability Initiatives (VOSI) which track vessel–level progress to implement best practices.

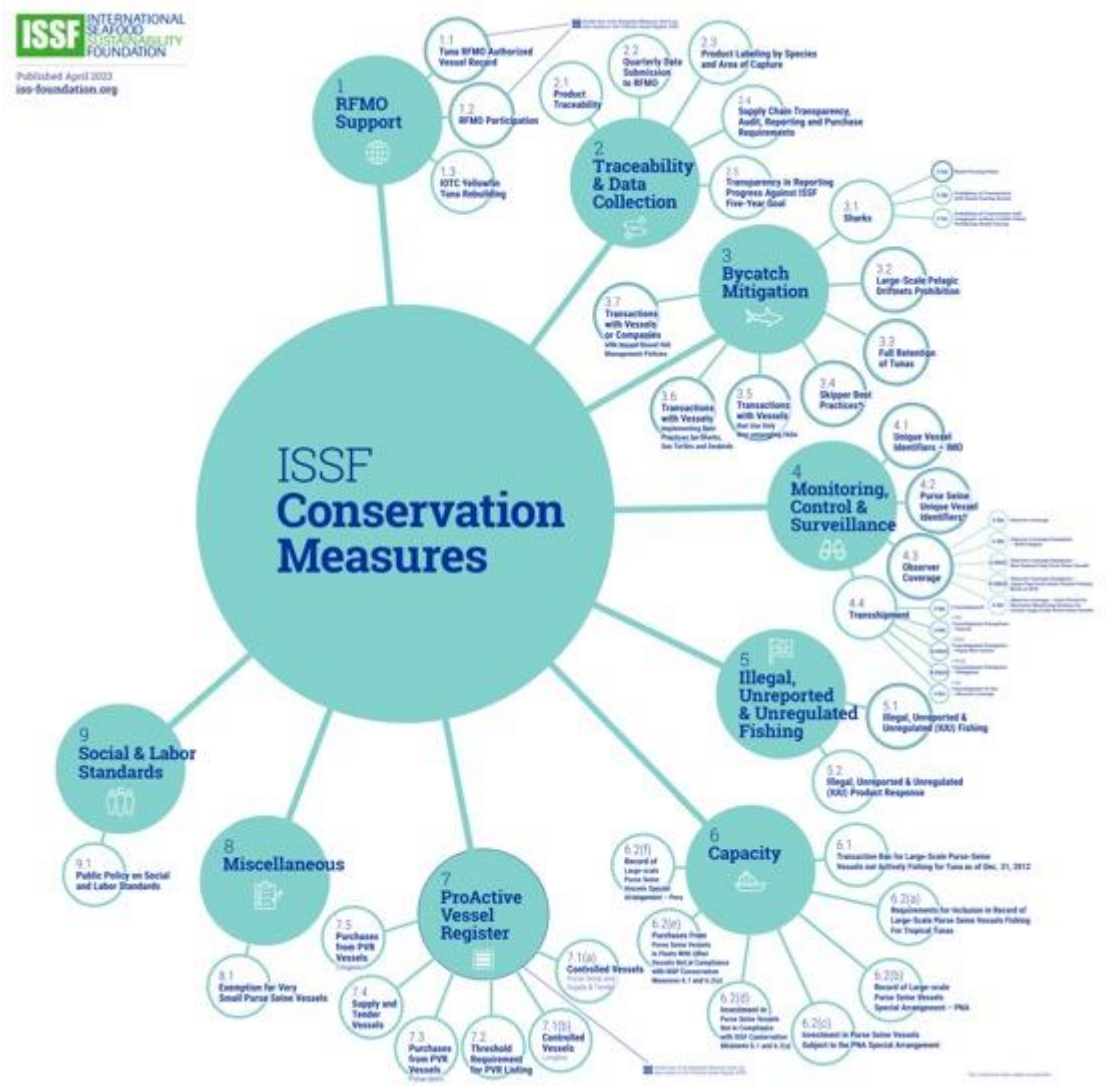
- **Advocate for stronger global tuna fisheries management by RFMOs**

# ISSF Conservation Measures

**30+ conservation measures across 9 categories**

- RFMO Support
- Traceability & Data Collection
- Bycatch Mitigation
- Monitoring, Control & Surveillance
- Fighting IUU
- Capacity Management
- PVR/Vessel Transparency
- Social & Labor Standards
- Misc

**ISSF Conservation Measures**
iss-foundation.org/vessel-and-company-commitments/conservation-measures-and-auditing/our-conservation-measures/



# ISSF's PVR (ProActive Vessel Register)

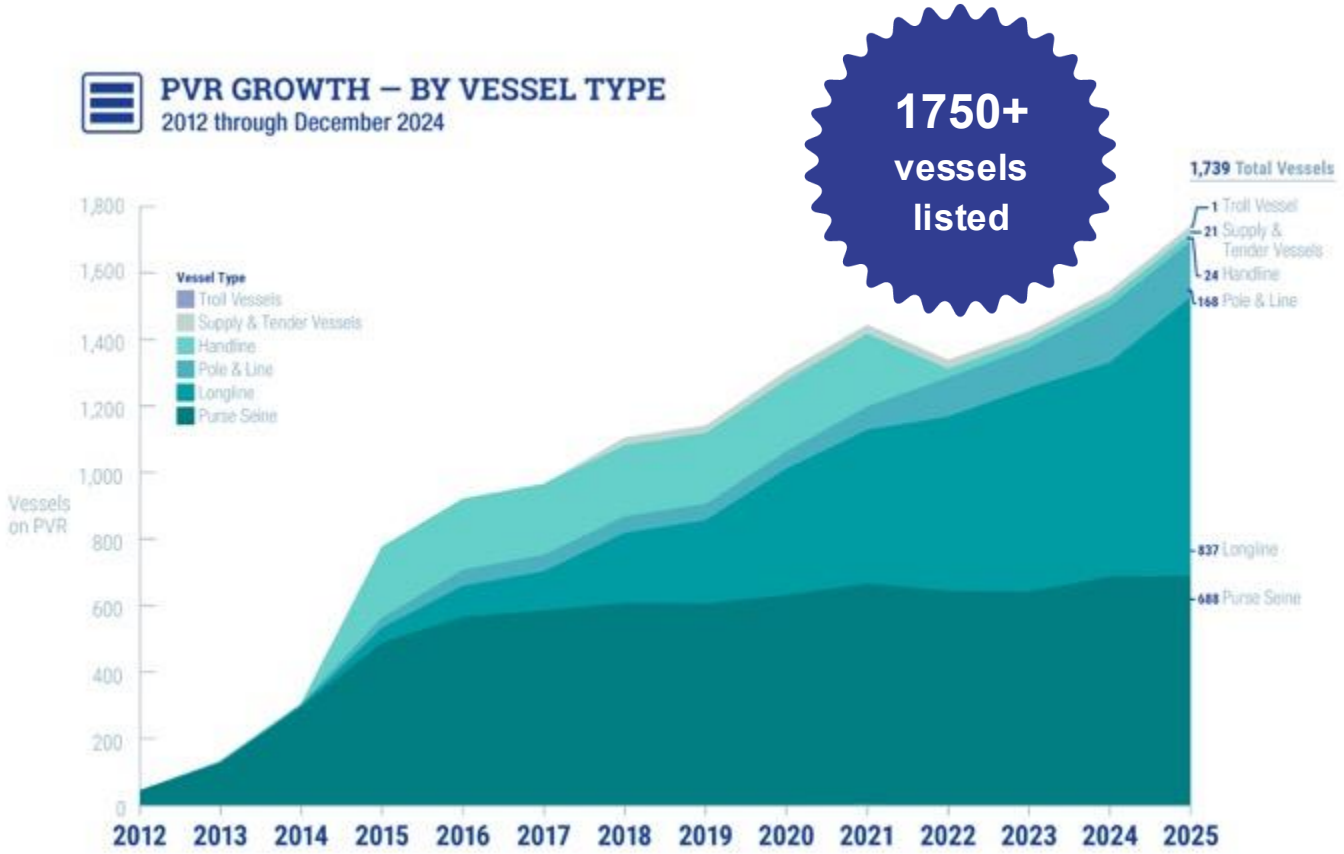
**Vessel-Level Transparency**

- Publicly accessible. Free to use.
- Any tuna fishing vessel may register. Free.
- Provides tuna purchasers with transparent, independently-audited information about vessel implementation of science-based best practices.

**Vessels on the PVR commit to:**

- Provide detailed vessel information about progress to implement best practices
- Independent audits by MRAG-Americas; transparently report compliance

ISSF participating companies have listed all controlled vessels and committed to source 100% of their large-scale purse seine purchases from PVR vessels.

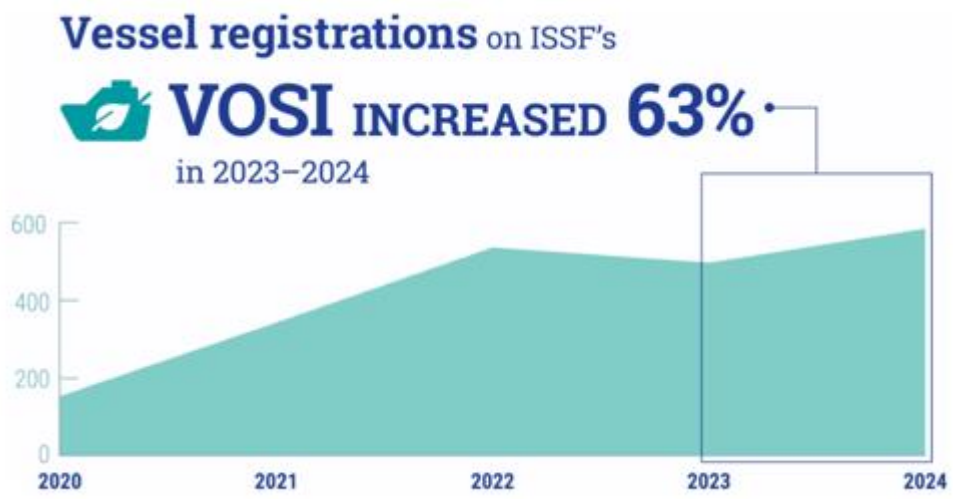



- **More than 70%** of the world's large tuna purse seine vessels
- **Longline +100%** vs 2020. Now 884

# Vessels in Other Sustainability Initiatives (VOSI)

**VOSI** is a transparency tool for the public that want to understand which tuna vessels have made public commitments to more sustainable fishing beyond the commitments reflected on the PVR.

**Learn more:** www.iss-foundation.org/vessel-and-company-commitments/other-vessel-lists/vessels-in-other-sustainability-initiatives-vosi/




**2,313 sustainability recognitions in total, covering best practice initiatives**

**Number of vessels on VOSI by key initiatives:**

- MSC-Certified - 766
- FIP - 262
- EM - 111
- Biodegradable FAD Trial - 191
- FAD Recovery Initiative - 145
- Fins Naturally Attached - 12
- Longline Circle Hooks - 6
- Longline Shark Lines Not Used - 6

**Independent verification by MRAG Americas**

# Why Your Vessels Should Be on the ISSF PVR and VOSI?

**Know your vessels.**

- The PVR and VOSI empower vessel-level transparency, partnership and management.

**Track vessel-level compliance with your policy and supply chain requirements.**

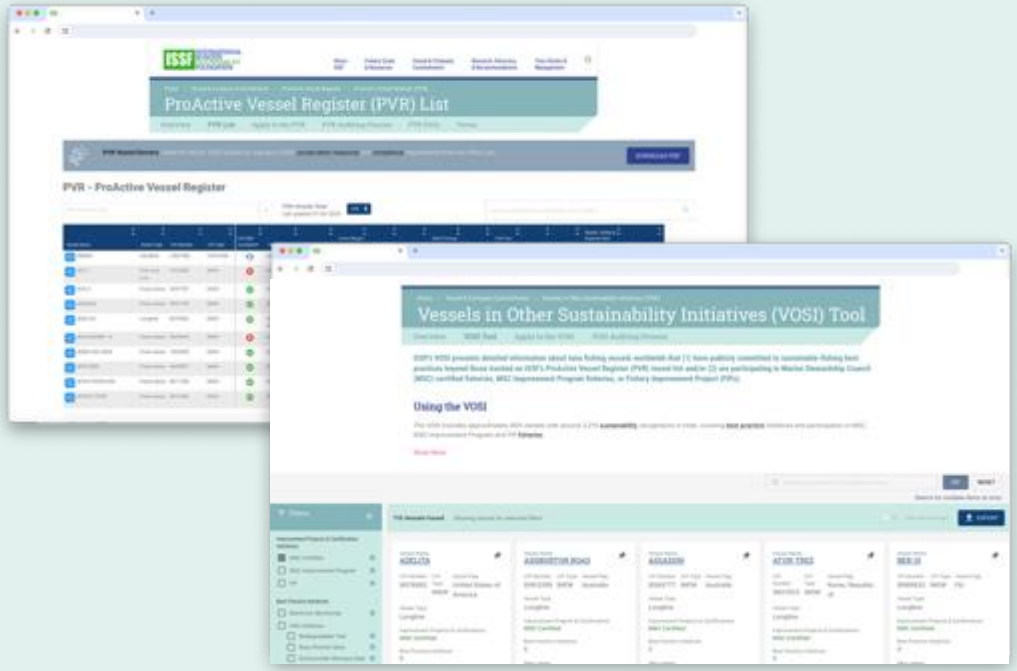
- The vessels on the PVR and VOSI are audited for commitments aligned with IUU prevention, Bycatch mitigation, observer coverage, FAD Management, FNA

**Lead Progress.**

- These databases address growing demand for vessel-level transparency about operating practices.
- In particular, the VOSI helps fulfill global pledges like 100% on-the-water monitoring and other progressive practices like:
  - Biodegradable FADs
  - FAD retrieval
  - Longline ETP Bycatch Mitigation

**Get Started Today**:

- Apply to the PVR
- Apply to the VOSI



# ISSF Annual Conservation Measure & PVR Compliance Report

*July 2025*

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# ISSF Participating Company & PVR Vessel Compliance

AT-A-GLANCE

**ISSF annual compliance report documents performance of:**

- **24 participating seafood companies,** each independently audited by MRAG Americas against **33 ISSF conservation measures**
- **1750+ Vessels** listed on PVR against relevant ISSF conservation measures


**99.6% overall company conformance rate** across all 24 audited companies

**21 of 24 companies** fully compliant on all ISSF conservation measures


**77.5% overall vessel pass rate** across all audited vessels on ISSF's ProActive Vessel Register

**100% public disclosure** of third-party audit findings

# ISSF 2025 Annual Compliance Report

## CHANGE OVER TIME — JUNE 2025

**Ambitious Commitment + Implementation Integrity = Sustainability Impact**

**99.62% Compliance**

- **ISSA Compliance Policy:** iss-foundation.org/downloads/14790/?tmstv=1668020851
- **Latest Annual Conservation Measures and ProActive Vessel Register Compliance Report (July 2025):** iss-foundation.org/downloads/40789/?tmstv=1760446933
- **Individual Company Audit Reports (July 2025):** iss-foundation.org/vessel-and-company-commitments/compliance-results/participating-company-audit-reports/

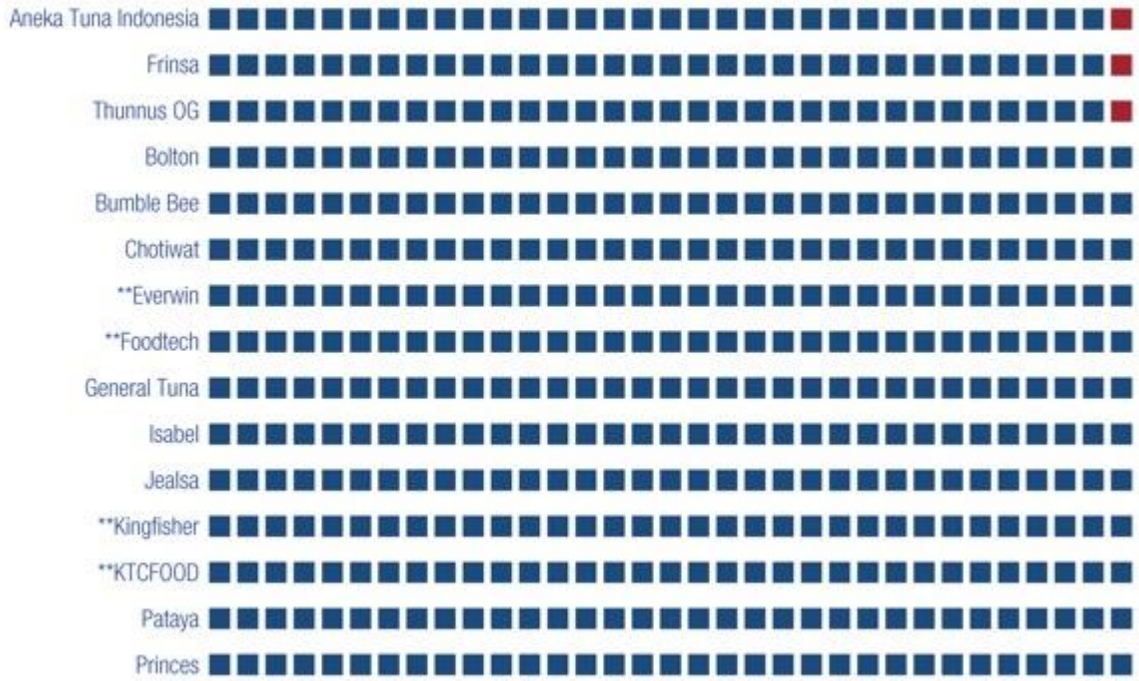
## All Companies

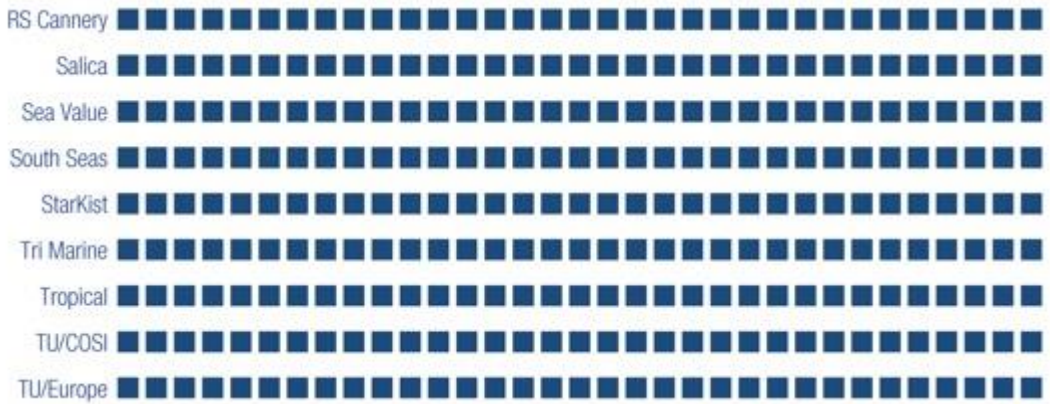
# ISSF 2025 Annual Compliance Report

## INDIVIDUAL COMPANY PERFORMANCE — JUNE 2025

**24 Companies*** — 33 Measures

*Companies are listed in order of level of compliance, then alphabetically.




### CATEGORIES OF COMPLIANCE

| | |
|---|---|
| **Conformance** | Company can provide evidence of full compliance. |
| **Minor Non-Conformance** | Company does not fully comply with a particular conservation measure or commitment, but this does not compromise the integrity of ISSF initiatives.<br>*Example: Participating Company submitted RFMO data beyond the stated deadline.* |
| **Major Non-Conformance** | Company does not comply with a particular conservation measure or commitment, and this compromises the integrity of ISSF initiatives.<br>*Example: Participating Company did not submit RFMO data.* |

# ISSF 2025 Annual Compliance Report

## ISSF CM 2.5 – FISHERY SOURCE AND SUPPLIER TYPE PURCHASES

### ISSF C.M. 2.5 – Transparency in Reporting Progress Against ISSF's Five-Year Goal

Requires companies to report the proportion of tuna purchases from sustainable sources — such as Marine Stewardship Council (MSC)-certified fisheries or comprehensive Fishery Improvement Projects (FIPs) — and provide roadmaps for improvement

**Charts illustrate newly audited individual company performance:**

- One shows percentage of purchases by fishery source (e.g., MSC-certified fisheries, MSC-assessed fisheries, comprehensive FIPs)
- Another details purchases by supplier type (e.g., ISSF participating companies, direct-from-vessel transactions).


**All 24 ISSF participating companies achieved full conformance**

# ISSF 2025 Annual Compliance Report

## ISSF CM 1.3 – IOTC YELLOWFIN TUNA REBUILDING

### Compliance data shows strong industry response to Indian Ocean YFT rebuilding efforts

Supports scientific advice to achieve stock recovery by requiring companies to publicly commit to and implement plans to reduce their sourcing of IO yellowfin

**Newly audited and reported:**

- Specific requirement to achieve sourcing reductions of 11% to 22%, based on average annual IO yellowfin purchases from 2017–2019
- **ISSF Participating Companies in aggregate reduced sourcing of IO YFT by 32.5%**

# ISSF 2025 Annual Compliance Report

## PVR: AUDITED AGGREGATE VESSEL-LEVEL COMPLIANCE

**Consolidated data on vessel-level aggregate compliance through ISSF's ProActive Vessel Register (PVR),** which tracks the alignment of individual vessels with 12 ISSF conservation measures.

- All PVR-listed vessels undergo **independent auditing** by MRAG Americas
- **This year's compliance summary includes gear-specific insights on vessel practices** — such as the use of non-entangling and biodegradable FADs, adherence to bycatch mitigation guidelines, and achievement of 100% observer coverage

# ISSF Advisory Engagement

## FIPS & MSC FISHERIES

MSC-Certified Tuna Fisheries

Find out which tuna fisheries worldwide have met the Marine Stewardship Council's stringent sustainability standards. MSC certification is a science-based global standard in sustainable fishing. Helping alltuna fisheries to become capable of realizing MSC's certification standards "without conditions" is ISSF's long-time guiding objective.

READ MORE

Tuna FIPs

Peruse our list of tuna Fishery Improvement Projects (FIPs) at all stages, with links to detailed FisheryProgress.org profiles. A FIP is a multi-stakeholder effort to address environmental challenges in a fishery, using the power of the private sector to incentivize positive changes toward sustainability.

READ MORE

| FIP NAME | FIP TYPE | GEAR TYPE(S) | RMFO REGIONS | TUNA SPECIES | FIP STAGE | START/PROJECTED END DATES |
|---|---|---|---|---|---|---|
| Atlantic Ocean tuna - longline (FCF) | Comprehensive | Longline | ICCAT | ALB, BET, YFT | Stage 4: Improvements in Fishing Practices or Fishery Management | October 2021 - October 2026 |
| Atlantic Ocean Tuna - longline (Star Trading) | Comprehensive | Longline | ICCAT | ALB, BET, YFT | Stage 4: Improvements in Fishing Practices or Fishery Management | April 2024 - April 2029 |
| Atlantic Ocean tuna - purse seine (Capsen & Grand Bleu S.A.) | Comprehensive | Purse Seine | ICCAT | BET, SKJ, YFT | Stage 4: Improvements in Fishing Practices or Fishery Management | April 2020 - April 2025 |

## ISSF MSC stakeholder input January - December 2024

**77 (81) submissions to 62 Fisheries:**

- 15 (33) to Announcement Comment Draft Reports
- 24 (17) to Public Comment Draft Reports
- 38 (31) at **Annual Surveillance Audits**
- Including 2 calls with CABs to discuss inputs

✓HS advocacy actions

✓ P1-P3 feedback based on Medley *et al*.

✓ ETP & habitats

✓ Vessel lists

✓ FAD management / LL responsible fishing guidelines

✓ …

- MSC engagement both during certification process and at annual surveillance audits.
- Held several calls with CABs to discuss ISSF's input.
- Also engaged with ASI for non-conformities by CABs.

# ISSF Science Innovation & Impact Program

**Impact on the Water Research**

**Verification Tools for the Seafood Industry**


**Consultations by ISSF Experts**

# Final Thoughts

ISSF INTERNATIONAL SEAFOOD SUSTAINABILITY FOUNDATION

# Thank You!

**iss-foundation.org**

Email: info@iss-foundation.org