

FROM SEA TO CAN:
2016
SOUTHEAST ASIA
CANNED TUNA
RANKING



GREENPEACE

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EXECUTIVE SUMMARY

This marks the second consecutive year that Greenpeace Southeast Asia evaluates the performance of canned tuna brands in Thailand and canneries in Indonesia and the Philippines – this time, in one combined report. Last year’s reports revealed that the region overall is lagging when it comes to ensuring that customers are provided with sustainably and equitably sourced tuna. This year, things remain in a mediocre state overall, but with a glimmer of hope since most companies are demonstrating improvement.

Tuna are amongst the most economically valuable fish in the world as well as an important predator species in marine ecosystems.¹ The tuna industry provides thousands of jobs in the catching, processing, and trading sector worldwide, including in many developing coastal states, and generates significant revenues in terms of access fees. Globally, commercial tuna is worth about USD 42 billion per year at the final point of sale, and about a quarter of that figure to the fishermen who target the fish.

The Western and Central Pacific Ocean is the world’s largest tuna fishery, yielding over half of the world’s total

catch in 2014. This was nearly 2.85 million metric tons of commercial tuna species, worth more than USD 22.68 billion at the final point of sale.²

Given the pressures fish species face globally, many tuna stocks are severely overfished. As of 2016, the International Union for Conservation of Nature’s (IUCN) Red List has listed *Thunnus alalunga* (albacore) and *T. albacares* (yellowfin) as “Near Threatened”, *T. obesus* (bigeye) and *T. orientalis* (Pacific bluefin) as “Vulnerable”, *T. thynnus* (Atlantic bluefin) as “Endangered”, and *T. maccoyii* (southern bluefin) as “Critically Endangered”.³ Most of the companies in this report are catching one or more of these species of tuna.

Because the tuna industry often operates at a great distance from the shores, this creates a ripe environment of little oversight, where unsavory businesses can exploit more than just

the marine environment. Unfortunately, it is an area where illegal, unreported and unregulated (IUU) fishing, forced labor and human rights abuses have joined together. Tuna companies continue to face numerous scandals of labor abuse and slavery in the tuna supply chain, threats of trade embargoes from exporting countries, and accusations of non-disclosure in terms of production information – they do not even know for sure what they are selling in their cans. Even when tuna companies do have a better understanding of their supply chain (traceability), they can be very reluctant to communicate this information to buyers (transparency) to allow them to make informed purchasing decisions.

While the methodology for assessing each company’s performance has remained the same since last year, Greenpeace is tightening the burden of proof, particularly since labor abuses and

destructive fishing practices remain widespread. Last year, several companies were given the benefit of the doubt that they were being truthful on certain questions, when it was later discovered that some of the answers they provided were actually untrue. To ensure better accuracy of responses, Greenpeace is requiring further supporting documentation for claims made by the companies.

PERFORMANCE THIS YEAR WAS MIXED. Fortunately, there is a higher rate of engagement by the companies this year on the survey process than there was for last year’s report. Over two-thirds of the largest tuna brands and canneries from the Southeast Asian region (Thailand, Philippines, and Indonesia) participated this year. This led to a higher degree of communication and corroboration of data provided for analysis, and may signal the beginning of a larger level of interest in greater transparency with the buying public.



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SKIPJACK IS MOST POPULAR.

Almost every company profiled sells skipjack tuna from the Western and Central Pacific Ocean. In general, this is a good thing as it is one of the most abundant tuna stocks. Of the companies who source skipjack, it makes up on average 71% of their total tuna sold. Unfortunately, more companies also source yellowfin tuna, which has been identified as “Near Threatened” on the IUCN Red List. Those who do sell this species are typically on average selling it as 28% of their total tuna. There are even some companies who are sourcing albacore (same IUCN listing as yellowfin) – and worse – bigeye, which is categorized as “Vulnerable”. Nonetheless, when viewed at a broader level, the profiled companies are generally on the right track, in that the majority of them rely on the most abundant tuna species – skipjack – to fill their cans.

FISHING METHODS REMAIN

PROBLEMATIC. Things become murkier upon analyzing the fishing method. Unfortunately, nearly every company relies on purse seine

fishing with the use of fish-aggregating devices (FADs). (See the “Fishing Methods” section of this report to learn more about this and other methods.) Briefly, purse seine fishing with FADs is largely uncontrolled and is a wasteful fishing method as it catches a large number of juvenile yellowfin and bigeye tuna, as well as 2.8 to 6.7 times more to non-target species, like sharks and other sea life, than purse seining without FADs. A typical profiled company sourced roughly 79% of its tuna from fishing vessels using this method. Worse, 15 companies source almost 100% purse seine, FAD-caught tuna. If there is some good news, it is that a handful of companies have been purchasing tuna that was caught using more responsible methods, such as FAD-free purse seine, handline, pole and line, or troll. Tuna canneries from Indonesia were more likely to source pole-and-line caught tuna, which is one of the most sustainable and responsible ways to catch tuna. However, when the industry is viewed as a whole, there is a long way to go towards sustainability in this regard.

TRANSPARENCY TO SOUTHEAST ASIAN CUSTOMERS IS POOR COMPARED TO OTHER REGIONS.

One of the findings in the report is the double standard that some companies exercise depending on the final consumer market. For example, a can of tuna with a final consumer destination within Thailand will frequently have little if any information on what kind of tuna is in the can. Meanwhile, that same company will make sure that the very same can, under a different label destined for the UK, will display all matter of information on the label, including the species of tuna, where it was caught, and the fishing method used. Consumers living here in Southeast Asia deserve to be as informed as consumers in other markets.

Our oceans, sea life, and the people who catch and process our tuna all deserve the best treatment possible. The tuna industry has an opportunity to reverse course and adopt more sustainable and equitable business practices that protect – instead of exploit – our marine environment and workers.

Greenpeace will continue to shed light on unsavory and harmful business practices until all tuna companies are competing on a level playing field, and the market no longer rewards illegal and unethical practices that incentivize certain companies to race to the bottom. The good news? As evidenced in this report, several tuna companies are on an upward trajectory, and appear to be internalizing concepts of sustainability in their policies. Read on to learn more about their performance.



WHY THE

TUNA SUPPLY CHAIN MATTERS

The canned tuna supply chain is highly opaque; indeed, this is one of the key reasons for combining an assessment of both canned tuna brands in the region (namely Thai brands) with some of the biggest canneries in the region (namely from Indonesia and the Philippines). A tuna brand cannot be 100% confident in its supply chain if it purchases tuna from a cannery that either purposely or carelessly commingles products from various fishing vessels without regard to species, fishing ground, or catch method. **The integrity of the supply chain is indeed the most important piece of the puzzle, because without it, well-meaning reforms could fail.**

For example, suppose a supermarket wants to sell its own brand of canned tuna to customers. Management at this supermarket feels a sense of responsibility towards protecting the oceans, and notices that customers are making more sustainable food choices. Therefore, they decide to only source from healthy stocks of skipjack tuna, and from fishing vessels that fish legally and sustainably (e.g., pole and line gear). Cannery X offers to sell this product to the supermarket, for a slight price premium. But suppose Cannery X sources tuna from all over, and has poor segregation practices in place, this could every well mean that the supermarket might end up buying cans of tuna that have **other tuna species inside** that were **caught with destructive fishing gear**. Worse, given the woeful oversight in the industry as a

whole, **slaves could have been used to catch the tuna in the can, and the tuna itself might even be illegally-sourced.** The supermarket would then end up selling bad tuna even though it is paying a higher premium for sustainable, quality product. Obviously this cannot stand.

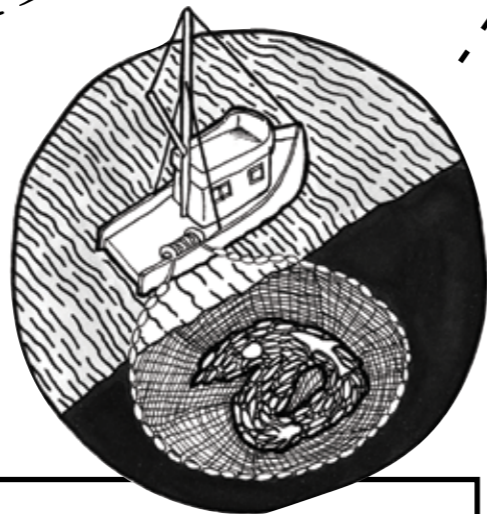
Greenpeace has been actively working to shed light on the tuna supply chain, in an effort to highlight best practices in traceability and to ensure that positive reforms further down the supply chain are not compromised at an earlier part in the supply chain. Several of our questions in the survey submitted to tuna companies inquire about a company’s standards for its suppliers, and whether the company has hired third-party auditors to double-check its processes and practices. We also request that companies (brands and canneries alike) show us their performance on traceability audits, and to disclose their source fishing vessels for verification purposes.

THE CANNED TUNA CHAIN OF CUSTODY



LOGLINER

Albacore, bigeye, and yellowfin tuna are generally caught on longlines: thick plastic ropes attached to thousands of individual hooks in series. Conventional longlines can stretch for several kilometers, and have bycatch rates of up to 30%. Greenpeace is calling on fishing companies to shift away from this destructive fishing method.

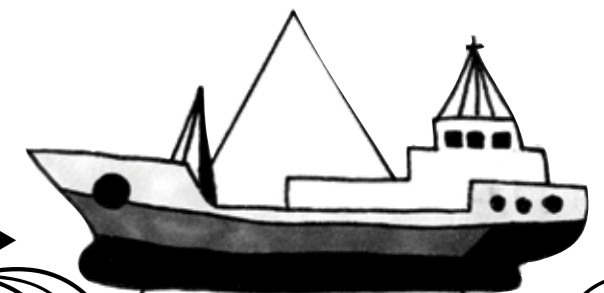


PURSE SEINER

Most skipjack tuna is caught by purse seine vessels, many of which employ fish aggregating devices, or FADs—floating objects that attract far more than just skipjack. FAD-associated purse seiners slaughter tens of thousands of sharks, rays, juvenile bigeye tuna, and other threatened animals every year. Greenpeace is campaigning for companies like Thai Union and others in this report to abandon FADs and to adopt more sustainable fishing methods.

TRANSHIPPER/REEFER

Much of the pirate fishing activity within the tuna sector is hidden by transshipping – vessels at sea transferring fish from one to another, often without any sort of observer coverage. This practice compounds the opacity of the seafood chain of custody and makes tracing a product to its source extremely difficult. Progressive companies are abandoning transshipping in favor of more defensible and transparent protocols that allow them to stand behind their product.



CANNERY

Traceability in the tuna chain of custody is often compromised at the cannery. Unless careful and transparent records are kept and rigorous protocols are followed, canneries can combine various loads and species of tuna together, creating a highly opaque product and making it difficult for consumers to make sustainable choices.

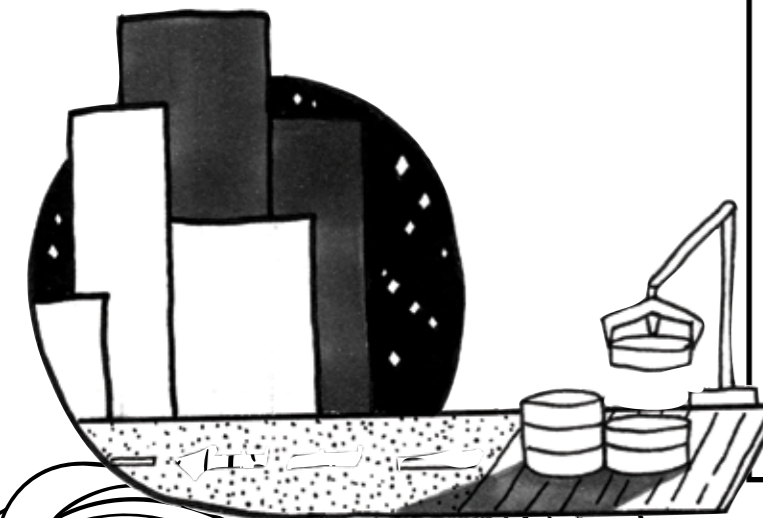
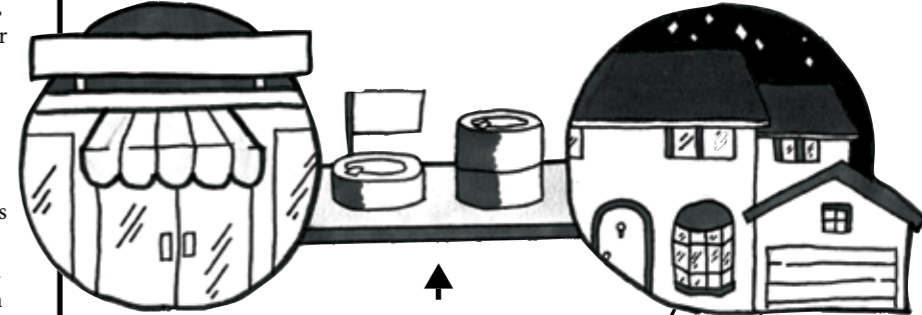


FOREIGN COUNTRY IMPORT POINT

The first point of control for tuna from Southeast Asia entering the importing country. While most countries have laws prohibiting the importation of illegally-caught or mislabeled seafood, the effectiveness of enforcement is lacking. Even the U.S., often heralded as a model for its fisheries management, only inspects less than 2% of seafood entering the country. Greenpeace is calling on retailers, policy-makers, and consumers to support critical traceability legislation in the top importing countries, which would help close borders to illegal, unregulated, and unreported (IUU) seafood and keep our oceans healthy and productive.

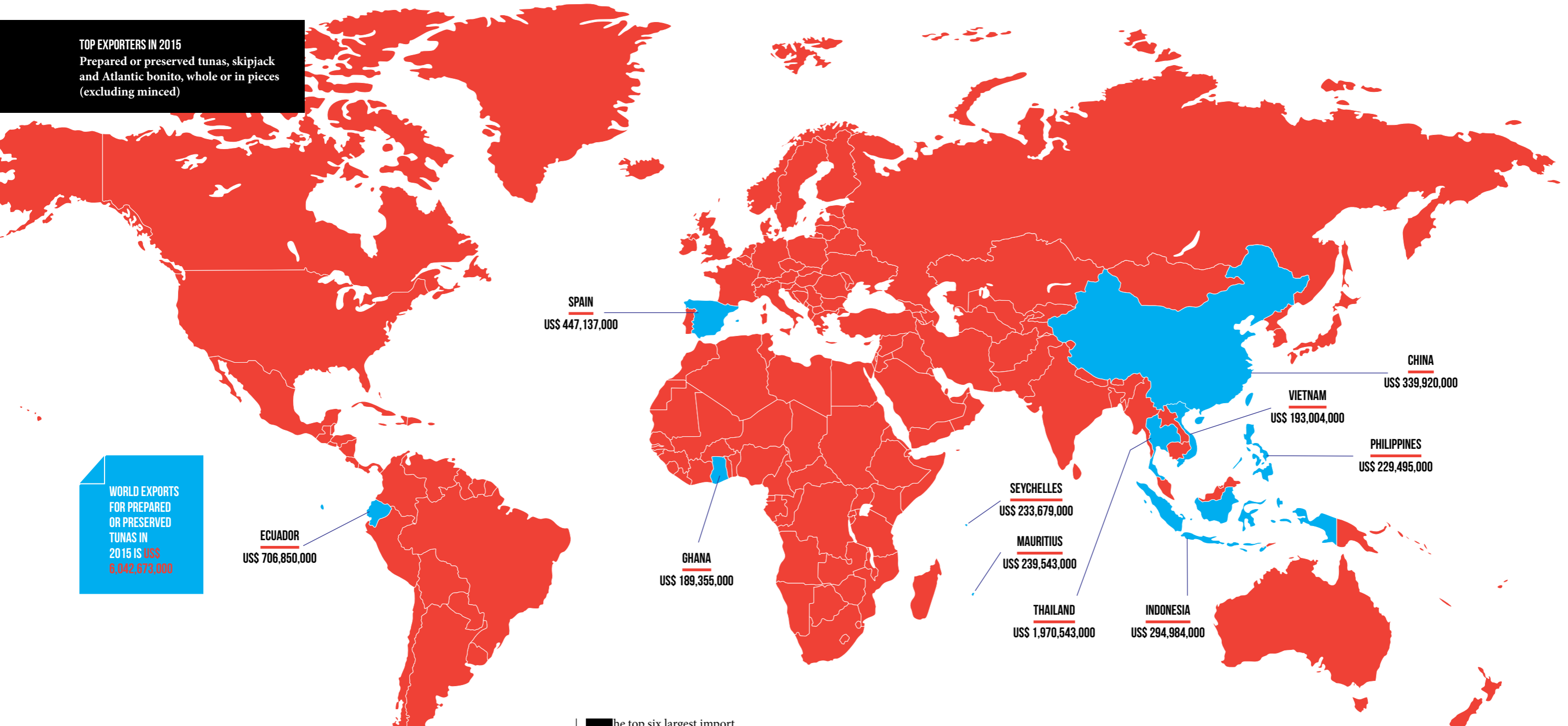
RETAILER

The retailers include all grocery stores, restaurants, and institutions that sell or serve tuna to customers. Greenpeace is calling on retailers to implement policies that will help customers make sustainable and responsible choices when buying canned tuna, and some Thai-based retailers are featured in this report, including Tesco-Lotus and Big C. Worldwide, Greenpeace has ranked retailers and foodservice companies in other major tuna-importing countries.



TOP EXPORTERS IN 2015

Prepared or preserved tunas, skipjack and Atlantic bonito, whole or in pieces (excluding minced)



WORLD EXPORTS FOR PREPARED OR PRESERVED TUNAS IN 2015 IS US\$ 6,042,673,000

CANNED TUNA TRADE

The top six largest import markets for canned tuna in 2015 were the U.S., Italy, U.K., France, Spain, and Germany. Thailand is the world's No.1 exporter of prepared or preserved tunas, comprising 32.8% of world exports for this product. Indonesia is No. 5, exporting some 4.9% while the Philippines is No. 7 with exports reaching 3.8%. These Southeast Asian countries were among the leading suppliers of canned / prepared tuna to the international market by volume⁴.

THE TOP TEN DESTINATIONS FOR CANNED TUNA FOR EACH OF THE THREE PROFILED COUNTRIES:

 THAILAND UNITED STATES, EGYPT, AUSTRALIA, JAPAN, CANADA, SAUDI ARABIA, LIBYA, UNITED ARAB EMIRATES, UNITED KINGDOM, & PERU.	 PHILIPPINES UNITED STATES, GERMANY, JAPAN, UNITED KINGDOM, NETHERLANDS, BELGIUM, ITALY, GREECE, PERU, & CANADA.	 INDONESIA SAUDI ARABIA, UNITED STATES, JAPAN, ITALY, AUSTRALIA, UNITED KINGDOM, THAILAND, LIBYA, MEXICO, & GERMANY.
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HUMAN RIGHTS ABUSES AND

ILLEGAL FISHING

As fish stocks decline from overfishing, industrial fleets expand, and demand increases for cheap seafood, companies are increasingly motivated to employ cheap or forced labor and to fish illegally^{5,6}. Several fishing operators use human trafficking networks to crew ships, and use “debt bondage, violence, intimidation and murder to keep crews in line and maintain cheap seafood” on the market⁷. Sadly, most of this takes place right here in Southeast Asia.

In March 2015, the Associated Press reported on slavery among Indonesian fleets,⁸ and two months later, Thailand made headlines with mass graves of suspected human trafficking victims at trafficking camps,^{9,10} and trafficking victims abandoned at sea.^{11,12} Labor abuses are often ignored by many government officials, who are sometimes complicit with the most egregious actors in the global fishing

There have been reports of slavery on fishing vessels in more than 50 countries.

industry. For example, Thai officials were found to have sent a letter to Thai IUU fishing operators, requesting that these vessels offload catches during a specific window to hide from monitors and avoid penalties.¹³ Indonesian government officials have historically failed to address widespread and severe abuse of workers, as well as colluded with Thai officials to allow human trafficking in the fishing industry.^{14,15} However, there are signs that the Indonesian government is starting to take things more seriously by establishing “Anti-IUUF Task Force 115”¹⁶ and releasing specific ministerial regulations on human rights compliance for fisheries businesses.¹⁷

There have been reports of slavery on fishing vessels in more than 50 countries.¹⁸ Greenpeace has documented deplorable working conditions on tuna purse seiners and longline vessels. Fishermen on a longline tuna vessel in the Western Pacific Ocean told Greenpeace they had not been to port in 18 months, were treated badly by crew, and were forced to live in terrible conditions.¹⁹

Companies that abuse their workers often engage in destructive or illegal fishing, and have little regard for fishery management regulations.^{20,21} As a direct result of overfishing, many coastal stocks are depleted and vessels must travel further out into the High Seas to fish. Rather than lose precious fishing time and incur increased costs of returning to port, the industry increasingly relies on **transshipment at sea**, where smaller boats refuel, restock, and transfer catch onto larger cargo vessels. This practice turns fishing boats into floating prisons, and enables vessels to hide illegally caught fish and/or mistreat crew members. Many trafficked and abused workers are forced to remain at sea with no means of escape, and men have reported being at sea for years.^{22,23} This is a key reason that questions surrounding at-sea transshipment are featured on the Greenpeace survey sent to the tuna companies in this report.

If Thai Union – the world’s largest canned tuna processor and owner of Sealect/Ocean Wave in this report – relies on transshipment at sea to operate, then it is reasonable to be concerned about all supply chains. Tuna can be commingled from several different sources with relative ease, obfuscating the supply chain and erasing detection of tuna caught in an illegal or unethical manner.²⁴ Well-documented tuna catch and poorly-documented tuna can also either be properly segregated or improperly commingled at the cannery, which is why canneries are also profiled in this report.²⁵

FISHING SUSTAINABLY

— NOT ALL FISHING METHODS ARE THE SAME

At a basic level, sustainable tuna fishing means targeting only well-managed tuna stocks that are in decent health, like skipjack, instead of targeting less stable tuna such as albacore, yellowfin, or worse – bigeye or bluefin. But **how tuna vessels catch these fish** – and whether this information is passed on to the cannery, the retailer, and ultimately the consumer – **matters significantly**.

Imagine you are eating at a buffet restaurant, but instead of picking out what you want to eat, you grab half of the dishes at the buffet and take them to your own table, so that no one else can eat them. Worse, you only eat a small amount but have already removed the food from the communal buffet table. Most people would consider you to be a rude and wasteful person. Some tuna companies hope that consumers don't see that their practices are very similar – that by using destructive fishing methods, they wastefully kill all kinds of marine animals – known as “bycatch” – in their quest for tuna.

Here are five of the most common methods of tuna fishing:



CONVENTIONAL, FAD-CAUGHT PURSE SEINE: most common for skipjack, or “chunk light” tuna. This overused and under-regulated method involves deploying a fish aggregating device (or FAD), which is a manmade floating raft, with various bits of old netting, ropes, or streamers hanging beneath, to attract tuna. Unfortunately, as well as skipjack tuna, FADs also attract juvenile bigeye and yellowfin tuna, and a range of other marine life including threatened sharks, and occasionally sea turtles. When a fishing vessel deploys a purse seine net around the FAD, which is like a large drawstring bag, it hauls the entire catch on to the vessel, and throws away (often dead) everything that is not tuna. The use of FADs results in 2.8 to 6.7 times more non-target species being caught and killed than fishing with purse seine without FADs (known as free-school fishing).²⁶ Juveniles of bigeye and yellowfin tuna are usually just processed and included in the can, and are not given the chance to mature. A study of the Western & Central Pacific region's catch revealed true catch rates of around 30% by weight for bigeye and yellowfin tuna, the majority of which were juveniles.²⁷ Another recent study revealed that in addition to what is caught in the nets, each year in the Indian Ocean, about 480,000 to 960,000 silky sharks are entangled in the netting and ropes that hang underneath these FADs.²⁸ Finally, lost or abandoned FADs join the vast array of other garbage in our oceans, finding their way onto beaches or getting entangled on coral reefs.²⁹



FAD-FREE PURSE SEINE (A.K.A. “FREE SCHOOL”): this is preferable to the method to above, resulting in a cleaner catch. Instead of setting a lure (a FAD) and catching everything there, here the vessel pursues a free-swimming school of skipjack, and sets the purse seine net on them. There is a significantly lower bycatch rate with FAD-free purse seine tuna fishing and fewer juvenile tunas (up to 90% less),³⁰ which is why Greenpeace recommends this method as an alternative to conventional FAD-caught purse seine.



POLE-AND-LINE: this is the “gold standard” for tuna fishing, and highly recommended by Greenpeace. Vessels usually deploy a group of men who each fish with a fishing pole and line, catching tuna one by one. This method results in very little to no bycatch, as it is highly selective. While some pole-and-line fishing vessels also rely on inshore anchored FADs, given the selective nature of the fishing, this is not the same problem as FAD-caught purse seine. This method is often employed for both albacore and skipjack.

Greenpeace urges tuna brands and processors to favor and source tuna that has been caught using more responsible methods, such as pole and line, handline, or FAD-free purse seine.



CONVENTIONAL LONGLINE FISHING: often used for yellowfin, bigeye, and albacore, this method of fishing involves setting a horizontal line in the water that stretches for up to 100 km long, with thousands of smaller vertical lines that drop down, each with a baited hook. This method has enormous bycatch rates of 30%, including seabirds, sea turtles, sharks, and other marine life that can become ensnared on the hooks.



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



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METHODOLOGY



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While the categories and scoring methodology for assessing each company's performance has remained the same, Greenpeace tightened the burden of proof this year. Last year, several companies were given the "benefit of the doubt" that they were being truthful on certain questions, when it was later discovered that some of the answers provided were actually false. To ensure better accuracy of responses, Greenpeace is requiring further supporting documentation for claims made by the companies.

Several companies provided feedback that they were confused and overwhelmed by the survey process and the questionnaire last year. In response, this year Greenpeace held a series of workshops in the Philippines, Indonesia, and Thailand to present the survey again, walk companies through the process in a step-by-step fashion, and answer any questions. Fortunately, these workshops were well-attended in both the Philippines and Thailand.

Greenpeace has invited companies to voluntarily participate in this survey. While laws in Indonesia, the Philippines, and Thailand do not oblige companies to participate in this survey or disclose corporate information to the public, Greenpeace believes that greater company transparency is the first step towards a traceable, sustainable, and equitable tuna supply chain, and would allow the public to make more informed purchasing decisions.

Greenpeace assessed company performance on the following seven-point criteria:

Like last year, Greenpeace Southeast Asia contacted the top 12 tuna brands from Thailand, the top 16 tuna canneries from Indonesia, and the top nine from the Philippines. Greenpeace requested that the companies participate in this year's survey process, and offered to help each company to accurately complete the questionnaires.



TRACEABILITY

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



SUSTAINABILITY OF CURRENT SOURCING

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



LEGALITY

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



EQUITY/SOCIAL RESPONSIBILITY

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



SOURCING POLICY

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



TRANSPARENCY AND CUSTOMER INFORMATION

Does the company demonstrate transparency and promote informed customer choices?



DRIVING CHANGE

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

TUNA BRANDS AND

CANNERIES SCORECARD

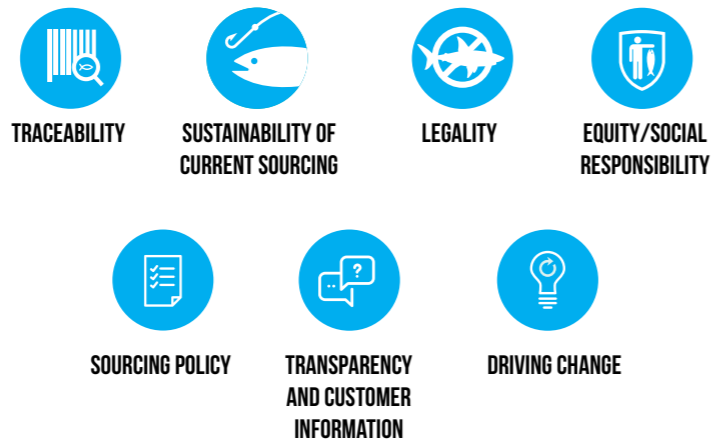
This year, not a single tuna brand or cannery reached the “good” category, which means a score of 70/100 or higher. Nearly all companies fell somewhere in the “fair” category of 40-69, some barely passing, others in the mediocre middle, and finally, a few falling just short of the “good” category.

The top performer this year was a newcomer to the survey process, **PT International Alliance Foods Indonesia**, which boasted 100% pole-and-line caught skipjack tuna – clearly a model for others to follow in sustainability. When looking at the **seven category winners**, this same company also won two of those categories: *sustainability of current sourcing* and *sourcing policy*. **Alliance Select Foods International** had the highest score for *traceability*, **PT Samudra Mandiri Sentosa** had the highest for *legality*, **Tops Supermarket by the Central Food Retail (CFR)** had top marks on *equity*, and **PT Deho Canning Co. & PT. Citra Raja Empat Canning Co.** had the highest in *transparency and customer information*. **Tesco-Lotus** was the only company to pass (i.e., not fail) the *driving change* category, which illustrates the sad state of affairs on proactive activities of regional tuna companies.

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



WITH SEVEN-POINT CRITERIA:



Rank by Country	Name of Cannery	2016 Grade	Traceability	Sustainability of Current Sourcing	Legality	Equity	Sourcing Policy	Transparency and Customer Information	Driving Change
INDONESIA									
1	PT. International Alliance Foods	68.88	●	●	●	●	●	●	●
2	PT. Deho Canning Company	62.15	●	●	●	●	●	●	●
2	PT. Citra Raja Ampat Canning	62.15	●	●	●	●	●	●	●
3	PT. Samudra Mandiri Sentosa	58.59	●	●	●	●	●	●	●
4	PT. Sinar Pure Foods International	51.64	●	●	●	●	●	●	●
5	PT. RD Pacific International	50.43	●	●	●	●	●	●	●
6	PT. Aneka Tuna Indonesia	41.58	●	●	●	●	●	●	●
7	PT. Balimaya Permai Food Canning Industry	33.06	●	●	●	●	●	●	●
8	PT. Maya Muncar	30.47	●	●	●	●	●	●	●
N/A	PT. Delta Pasific Indotuna	-	●	●	●	●	●	●	●
N/A	PT. Avila Prima Intra Makmur	-	●	●	●	●	●	●	●
N/A	PT. Banyuwangi Cannery Indonesia	-	●	●	●	●	●	●	●
N/A	PT. Carvinna Trijaya Makmur	-	●	●	●	●	●	●	●
N/A	PT. Juifa International Foods	-	●	●	●	●	●	●	●
N/A	PT. Medan Tropical Canning	-	●	●	●	●	●	●	●
N/A	CV. Pasific Harvest	-	●	●	●	●	●	●	●
PHILIPPINES									
1	Ocean Canning Corporation	51.46	●	●	●	●	●	●	●
2	Celebes Canning Corporation	44.63	●	●	●	●	●	●	●
3	Century Pacific Food Corporation	44.09	●	●	●	●	●	●	●
4	Philbest Canning Corporation	41.76	●	●	●	●	●	●	●
5	Alliance Select Foods International	41.20	●	●	●	●	●	●	●
6	Seatrade Canning Corporation	41.06	●	●	●	●	●	●	●
N/A	CDO Foodsphere	-	●	●	●	●	●	●	●
N/A	Permex Producers and Exporters Corp.	-	●	●	●	●	●	●	●
N/A	Bigfish Foods Corp.	-	●	●	●	●	●	●	●
THAILAND									
1	TOPS manufactured by Thai Union for Central Food Retail, Co.	51.99	●	●	●	●	●	●	●
2	TCB manufactured by Tropical Canning	50.47	●	●	●	●	●	●	●
3	KING'S KITCHEN manufactured by Premiere Marketing	47.07	●	●	●	●	●	●	●
4	SEALECT / OCEAN WAVE manufactured by Thai Union, Distributed by T-Holding Co. & Loxley Trading Co., Ltd.	43.09	●	●	●	●	●	●	●
5	ROZA manufactured by Hi-Q Food Products	42.73	●	●	●	●	●	●	●
6	NAUTILUS / SEA CROWN produced and distributed by Pataya Foods	41.06	●	●	●	●	●	●	●
7	TESCO produced for Tesco Lotus by Pataya Food Industries, Ltd.	40.89	●	●	●	●	●	●	●
8	ARO / SAVEPAK by Siam Makro Public Company Limited	40.00	●	●	●	●	●	●	●
9	AYAM produced by Thai Union	34.88	●	●	●	●	●	●	●
N/A	BIG C manufactured by Thai Union	-	●	●	●	●	●	●	●
N/A	HOME FRESH MART manufactured by Thai Union	-	●	●	●	●	●	●	●
N/A	Thai Union for Home Fresh Mart, The Mall	-	●	●	●	●	●	●	●



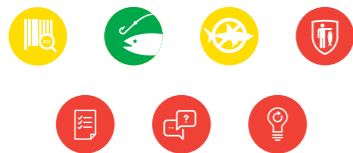
INDIVIDUAL COMPANY PROFILES



PHILIPPINES

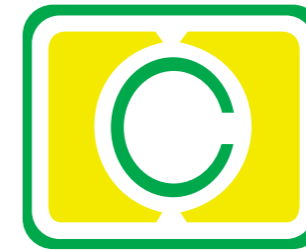


OCEAN CANNING



51.46

Ocean Canning claims that it sources 100% FAD-free skipjack and yellowfin. To support its claim, Ocean Canning submitted a FAD-free contract with one of its buyers based in Germany. It also submitted a list of fishing vessels, but has not indicated the type of fishing gear used. Ocean Canning has no official website where one could get more information about the company, and it needs to improve on equity, sourcing policy, transparency and customer information, and driving change. Its internal policy should be made public, and it should be expanded to include stronger language on worker protections and sustainability standards pertaining to fishing method, a ban on shark finning, and clear ban on at-sea transshipment. We strongly recommend that the company establishes its official website in the near future.



CELEBES CANNING



44.63

Celebes Canning has a clear policy on traceability and it submitted documents that described its cannery coding system, complete with species and date of production. Unfortunately, it did not provide a list of fishing vessels which is an important element in the traceability system. Its main source of tuna is in the Western and Central Pacific Ocean, with primarily skipjack and some yellowfin (as well as a trace of bigeye). Unfortunately, Celebes sources exclusively from fishing vessels that use indiscriminate FAD purse seine fishing. In addition to this lackluster sourcing, it needs to significantly strengthen its tuna procurement policy and release it to the public, as well as strongly consider how it can be a more active player in driving change in the industry.



CENTURY PACIFIC FOOD INC.

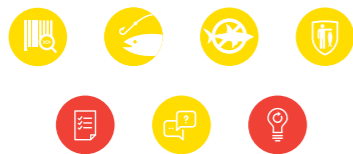


44.09

Century Tuna, the most popular tuna brand in the country, only submitted supporting traceability documents well after a generous extension of the deadline, so they could not be factored in its overall score. While their website has a respectable amount of information, there is no indication of the status of the stocks where its supply is coming from. The company is proud of its handline-caught yellowfin premium brand in cooperation with WWF, but only 1% of the yellowfin are caught using this method. To the company's credit, it is the only brand in the Philippines which specifies the species and the fishing gear used on the label. However, with yellowfin and bigeye collectively making up 20% of its overall catch, with a high likelihood of many juveniles, Century's contribution to the sustainability of the resource is in question. In fact, 99% of all of its tuna is caught using destructive purse seines with FADs. Century needs to transition to more responsible ways of fishing and improve more in the aspects of social equity and driving change.

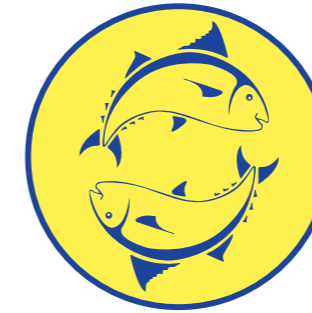


PHILBEST CANNING

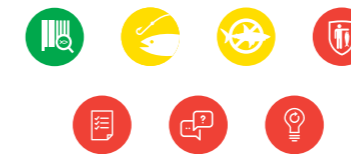


41.76

Philbest Canning is RD Corporation's canned tuna brand in the Philippines. While the company claims that 52% of its tuna was caught using FAD-free fishing techniques and the remainder is caught using regular purse seiners, it did not provide evidence of this or a list of source fishing vessels. Philbest should introduce a robust tuna sourcing policy that centers on sustainability and worker protection standards. The good news is that the company expressed an interest in increasing the amount of its product that is sustainably caught; now, it is a matter of implementation and proper documentation.

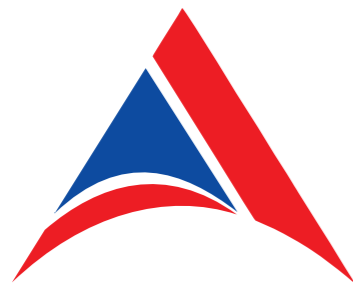


SEATRADE CANNING

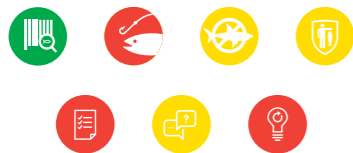


41.06

Seatrade Canning almost failed this assessment. While it provided evidence of traceability and third party audits, it otherwise performed poorly in all other categories. It sources mostly skipjack and some yellowfin tuna from destructive FAD purse seine fishing vessels. It claimed it had an internal policy but did not provide Greenpeace with a copy so several claims could not be verified. Essentially, the company must improve in every way possible. There is a sliver of hope: it expressed a desire to source 30% of its product from pole and line tuna fisheries within two years. We – and the oceans – hope that the company follows through!



ALLIANCE SELECT FOODS INTERNATIONAL



41.20

Alliance Select Foods International. While Alliance Select Foods International (ASFII) is related to PT International Alliance Food Indonesia (PTIAFI), they have significant differences insofar as the sources of tuna and fishing gear are concerned. This is why ASFII's score is significantly lower than PTIAFI's (68.88). ASFII's policy states that the company sources species such as fresh and frozen skipjack, yellowfin and bonito, but there is no mention of sourcing from vessels that use responsible fishing methods. Its internal policy needs to be significantly strengthened, and the company had contradictory answers on whether it allows at-sea transshipment. Alliance has a lot of work to do before it can be considered on par with its Indonesian counterpart.

COMPANIES THAT DID NOT PARTICIPATE - FAILED

The following companies did not participate in the survey process and have insufficient publicly-available information online, which leads to no confidence in the traceability, sustainability, and social equity of their tuna sourcing. These companies did not participate two years in a row.



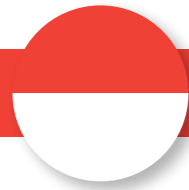
**BIGFISH
FOODS CORP.**



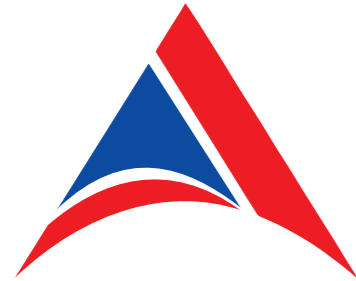
**CDO
FOODSPHERE**



**PERMEX
PRODUCERS AND
EXPORTERS CORP.**



INDONESIA



PT INTERNATIONAL ALLIANCE FOOD INDONESIA

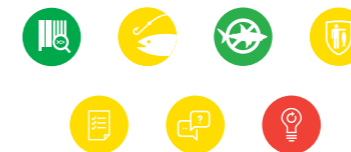


68.88

PT International Alliance Food Indonesia was the top performer out of all the companies profiled, and deserves credit for nearly achieving a “good” ranking. It is the subsidiary of the Indonesian company Alliance Select International, with its main office based in the Philippines. In its internal tuna procurement policy issued July 2016, it stated that the company will “work towards sourcing from fishing vessels that target free-swimming tuna schools or use non-entangling FADs” and that the company “will not source from purse seines that conduct transshipment at sea.” The policy also indicated support for pole-and-line fisheries when possible as a more responsible option for tuna fisheries. Interestingly, they actually exceed their own policy by having the most responsible sourcing out of all companies profiled in the report: 100% pole and line caught skipjack tuna from the Western and Central Pacific Ocean. The company is also exploring the use of sustainable baitfish, given that target baitfish species can often be overexploited globally. Next steps should include making its policy public and even stronger by explicitly forbidding shark finning and at-sea transshipment, explicitly protecting workers, and calling for the protection and promotion of marine reserves. For now however, its current sustainability practices set the standard for other canneries in the region to follow.



PT SAMUDRA MANDIRI SENTOSA



58.59

Samudra Mandiri Sentosa is a consistent participant in the 2-year cannery ranking process. The company’s submission of documents includes almost the entire supply chain such that the fishing vessels are listed (along with their fishing methods), and their buyers abroad are known. Around 40% of the tuna supply comes from more responsible fishing methods like pole and line and handline. While SMS is becoming a key player in promoting the shift towards sustainability and traceability, it still needs to address the rest of its supply coming from destructively-caught FAD purse seine fishing. It should also move forward with a public-facing tuna policy that has strong worker protection standards.



PT CITRA RAJA AMPAT CANNING & DEHO CANNING COMPANY

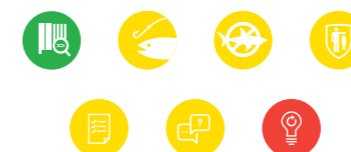


62.51

Citra Raja Ampat Canning and Deho Canning Company, two companies under the same management, performed well this year. Its current tuna sourcing practices are highly responsible, as it sources 100% pole and line caught tuna from the Western & Central Pacific Ocean (almost all skipjack). However, the company struggles in areas like transparency and sharing its tuna sourcing policy with the public. It needs to codify its current sourcing practices into a policy, be far more open, and communicate more clearly to customers through its packaging and via a website which the company has yet to create.



PT SINAR PURE FOODS INTERNATIONAL



51.64

PT Sinar Pure Foods International sources about 30% of its skipjack and yellowfin tuna from pole and line. To support this claim, it submitted a list of fishing vessels with documented catch method. However, it should seek third party audits that encompass full traceability and worker treatment, and not just food safety. The company has a public-facing procurement policy, and while it encourages fishing vessels to either register their FADs or go FAD-free, Greenpeace encourages PT Sinar to only source from pole and line or FAD-free purse seine vessels.



50.43

PT RD PACIFIC INTERNATIONAL



RD Pacific International is the Indonesian subsidiary of RD Corporation with corporate headquarters in Manila. While It claims that 52% of its procured tuna comes from free school purse seine, it has provided insufficient information to support such claims. Some documents indicate that pole and line caught tuna gets into the supply chain, but the volume is unknown. It should phase out its small volume of bigeye, and seek to transition its modest amount of yellowfin to skipjack. The company indicated that it would release a tuna procurement policy within the year, and Greenpeace hopes that the company produces a strong policy, complete with a clear ban on at-sea transshipment and shark finning, clear language supporting marine reserves, and a promise to shift to more sustainable fishing practices.



P.T. BALIMAYA PERMAI
FOOD CANNING INDUSTRY

33.06

PT BALIMAYA PERMAI FOOD CANNING INDUSTRY

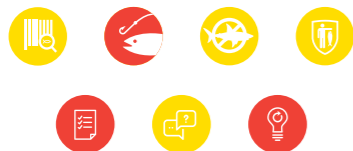


Balimaya Permai Food Canning Industry failed in this year's assessment, primarily for its poor sustainability in its current tuna sourcing. It sources exclusively from the Indian Ocean – primarily albacore and yellowfin stocks, which are not doing well. While it does source some tuna that was caught responsibly, it does not make up for the even higher reliance on devastating fishing methods such as longline-caught albacore. Balimaya needs to also strengthen its tuna sourcing policy and release it to the public, as well as provide far more information to customers on where the tuna is coming from.



41.58

PT ANEKA TUNA INDONESIA



Aneka Tuna Indonesia barely made a passing score, and has a lot of work to do. Its stronger points are its publicly posted tuna policy and its efforts to provide information to customers. Beyond that, it struggles with every other category, namely, that it does not have high sustainability or worker protection standards. It should be more transparent in its traceability and performance in related audits. Finally, it sources tuna from all over the place, with skipjack, bigeye, yellowfin, and albacore caught in the Western Pacific and Indian Oceans. While Aneka must swiftly switch to healthier tuna stocks, it does deserve credit for its partial reliance on pole and line, trolling, and handline fishing methods, which are far more responsible than the remainder of its purse seine FAD-caught tuna. Greenpeace urges Aneka to more fully commit to these responsible fishing methods and to cease the capture of bigeye immediately.



30.47








PT MAYA MUNCAR

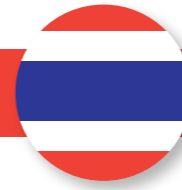


Maya Muncar failed in this year's assessment. The company is sourcing 85% of its supply mostly from the less plentiful Indian Ocean, with the rest of its tuna some tunas coming from the Western Central Pacific Ocean. It procures skipjack, yellowfin, albacore, and longtail tuna, and claimed that it catches yellowfin and longtail using pole and line (which is a responsible method of fishing). However, there was scant documentation to verify this latter claim. The company also claimed catching albacore using handline, but was unable to submit supporting documents. On the other hand, Greenpeace sees that this company is on its way to improving its traceability and sustainability criteria very soon. As far as the other criteria are concerned, Maya Muncar needs to work much harder in all areas to improve its current standing.

COMPANIES THAT DID NOT PARTICIPATE - FAILED

The following companies did not participate in the survey process and have insufficient publicly-available information online, which leads to no confidence in the traceability, sustainability, and social equity of their tuna sourcing.

 <p>PT. DELTA PASIFIC INDOTUNA</p> <p>PT. DELTA PASIFIC INDOTUNA</p> <p>PT. Delta Pasific Indotuna participated last year but did not do so this year, and failed this year's ranking.</p>	 <p>PT. AVILA PRIMA INTRA MAKMUR</p> <p>PT. Avila Prima Intra Makmur has failed to participate two years in a row, and failed this year's ranking.</p>	 <p>PT. BANYUWANGI CANNERY INDONESIA</p> <p>PT. Banyuwangi Cannery Indonesia has failed to participate two years in a row, and failed this year's ranking.</p>	 <p>PT. CARVINNA TRIJAYA MAKMUR</p> <p>PT. Carvinna Trijaya Makmur has failed to participate two years in a row, and failed this year's ranking.</p>
 <p>PT. JUIFA INTERNATIONAL FOODS</p> <p>PT. Juifa International Foods is Indonesia-based supplier for Thai Union's Chicken of Sea Brand in US that obviously has failed to participate two years in a row, and failed this year's ranking.</p>	 <p>PT. MEDAN TROPICAL CANNING</p> <p>This year's ranking is first invitation and opportunity for PT. Medan Tropical Canning to participate to the survey but unfortunately the company neglected it and failed.</p>	 <p>CV. PASIFIC HARVEST</p> <p>PT. Banyuwangi Cannery Indonesia has failed to participate two years in a row, and failed this year's ranking.</p>	



THAILAND

51.99



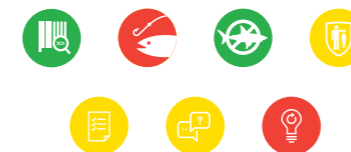
TOPS SUPERMARKET



Tops Supermarket, manufactured by Thai Union (T-Holding Co.), ranked the highest among Thai companies profiled in the report, despite its modest overall score. It rapidly improved since last year, and overtook competitor TCB in the process. Tops sources its tuna from Thai Union Foods (TUF), but scored higher than TUF due to its higher standards. Last year, it relied on destructively caught tuna, but this year Tops heeded our advice in our previous report and now only purchases FAD-free caught tuna (tonggol from Vietnamese fishing vessels), and the supermarket submitted documents to back up this claim of a far more responsible fishing method. However, this is merely their current practice, and is not ingrained in company policy. Given that the company even submitted a recent SEAFDEC report that indicates how tonggol tuna stocks in the Indian Ocean are being overfished while the stocks in the Pacific Ocean are not, we urge the company to develop policy which explicitly allows sourcing of tonggol tuna only from Pacific stocks – or better yet, it could even consider skipjack. Tops also has some ambitious plans to implement by year end regarding customer information, labeling, and transparency, and plans to use its supermarkets to communicate with customers more directly on its tuna. The company should be very cautious with its supplier, and ensure that the problems that have recently plagued TUF are not affecting the product sourced by Tops. Tops must adopt stronger worker protection standards and be highly vigilant in auditing worker treatment down the supply chain.



TCB

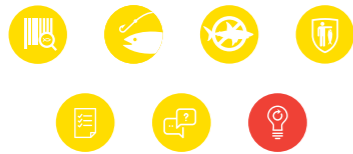


50.47

TCB, manufactured by Tropical Canning, has tight traceability in place, forbids at-sea transshipment, and has a strong worker-protection policy. These are the foundations upon which positive reforms can develop in (we hope) the near future. Unfortunately, the company failed on sustainability, as it does not catch skipjack (sourcing instead only yellowfin and tonggol), and it sources exclusively from a destructive fishing method that relies on purse seine nets and FADs. If it can directly address this issue and be a driver of reform in the industry, it has the potential to jump up the charts given that it has such solid documentation of its policies and practices.



KING'S KITCHEN

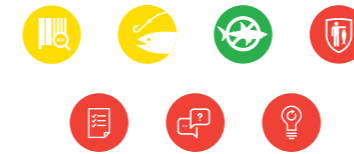


47.07

King's Kitchen, manufactured by Premier Canning Industry Co., deserves credit for 100% pole and line caught yellowfin tuna, the best fishing method. While yellowfin is far less abundant than skipjack, if it intends to source only yellowfin tuna for its canned/pouched selection, it should at minimum phase out its Indian Ocean stock, which is in dire shape, and switch to Western Pacific only. Despite a strong showing on fishing method, it did not perform well overall, namely for a lack of a tuna sourcing policy, no evidence of a non-governmental, independent audit of its operations, and very little in the way of transparency to customers.

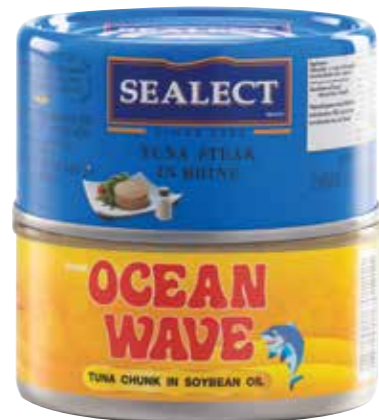


ROZA



42.73

Roza of Hi-Q Food Products Co. claimed that it is sourcing FAD-free tonggol tuna in its products but no supporting documents have been submitted to support this claim. The company deserves credit for reforming its sourcing policy, and for its strict ban on at-sea transshipment. Apart from high marks in the legality category, Roza has a lot of work to do in all other areas, and should provide proof of FAD-free fishing to receive full credit on its current sustainability.



OCEAN WAVE & SEAELECT

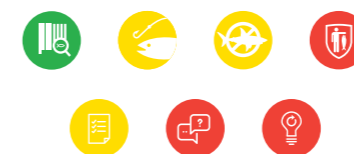


43.09

Ocean Wave and Seaelect, brands of Thai Union Foods (T-Holding Co.), did not perform well overall but did manage to avoid failing. The company has invested in a splashy new website detailing their plans moving forward with traceability, sustainability, and worker protections. However, for the most part, they are just that – plans – and it remains to be seen whether they will reach their goals in these areas. For now however, TUF is reeling from scandals related to sustainability and the treatment of crew on TUF-sourced fishing vessels, and it is our hope that the company can make a swift turnaround. As the largest tuna company in the world, it is even more troubling that it sources 100% FAD and purse seine caught skipjack tuna for its Thai brands, given the destructive nature of that fishing method. TUF has been shady in the past regarding its transshipment practices, as it previously claimed 100% ban on at-sea transshipments (only for it to later be discovered that this purported ban covered only a tiny percentage of its overall fleet). This year, it could not provide evidence to prove that it has 100% observer coverage to supervise at-sea transshipments, as claimed. This company must improve its practices across the board, if it seeks to truly one day be considered a leader in the industry.



NAUTILUS & SEA CROWN



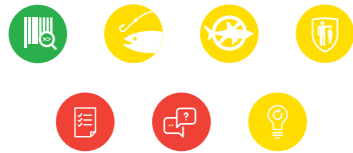
41.06

Nautilus and Sea Crown, brands of Pataya Food Industries, barely made a passing grade. Its biggest problem is that the skipjack and yellowfin tuna are exclusively caught with destructive purse seines and FADs. Pataya Food also struggled to provide proof of social equity, provided scant customer information, and does not drive change in the industry. Pataya Food does receive credit for posting its tuna policy online, which clearly applies to the two brands. However, its policy did not contain as much robust language as claimed, and the company could improve by revisiting the language and tightening its standards.

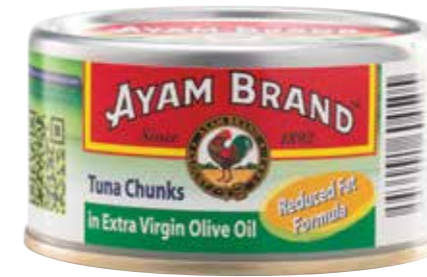


40.89

TESCO-LOTUS

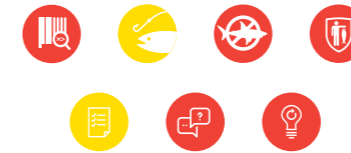


Tesco-Lotus or Ek-Chai Distribution System Co. would have scored higher had its parent company, Tesco, applied the exciting initiatives for its UK-based supermarkets' canned tuna to Tesco-Lotus as well. Unfortunately, its sourcing of tuna in the Southeast Asian region leaves much to be desired for customers living outside of the UK, and there is a disconnect between the UK Tesco policy and what is actually offered under Tesco-Lotus. Tesco-Lotus has two key suppliers for its supermarket brand – Pataya Food Industries and Unicord PLC. The difference in their overall score between the two was minor, though Pataya Food sources a cleaner catch of 100% skipjack whereas Unicord procures primarily skipjack but also a small percentage of less healthy species. Unfortunately, both suppliers to Tesco-Lotus provide tuna caught using destructive FADs and purse seine nets. If there is a strong point for the company, it is this: through primarily the global efforts of its parent company, Tesco, this was the only company profiled to not fail the “driving change” category.



34.88

AYAM

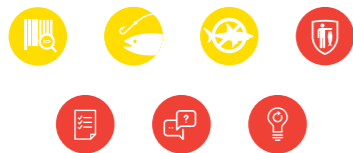


Ayam, manufactured for Thai market by Thai Union, did not fully participate in the survey process and failed in the ranking, but Greenpeace was able to gather meaningful information about the company between the decent amount of tuna sourcing information on their website and via some direct communication with Ayam staff. While the company has a lot of work to do, particularly in traceability, there is every indication that Ayam is set to improve soon, as it will be releasing its tuna policy in 2017.



40.00

ARO & SAVEPAK



Aro and Savepak, store brands of Siam Makro (acquired by CP ALL), nearly failed this year's ranking. The supermarket sources 100% FAD purse seine caught skipjack and yellowfin, which is a destructive fishing method. The company relies on Pataya Food Industries for its tuna (and Pataya Food's policy), but does not have a policy of its own. The company had poor marks for equity/labor, its sourcing policy, transparency to customers, and driving change.

COMPANIES THAT DID NOT PARTICIPATE - FAILED

The following companies did not participate in the survey process and have insufficient publicly-available information online, which leads to no confidence in the traceability, sustainability, and social equity of their tuna sourcing.



BIG C

Big C, manufactured by Thai Union, did not participate either last year or this year, and has failed both years. Its reliance on Thai Union is worrying.



HOME FRESH MART

Home Fresh Mart, manufactured by Thai Union for Home Fresh Mart, The Mall did not participate either last year or this year, and has failed both years. Like Big C, its reliance on Thai Union is worrying.



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RECOMMENDATIONS

KEY ELEMENTS OF A SUSTAINABLE AND SOCIALLY RESPONSIBLE CANNED TUNA SOURCING POLICY

Ensuring sustainable and equitable tuna for customers can only be achieved by setting clear goals and timelines to guide the implementation of a company's sustainability commitments. Successful crafting and implementation of a seafood procurement policy will be more easily achieved if the following steps are considered:

- Consult relevant experts and NGO allies before creating and approving a policy
- Include clear and detailed sourcing requirements using prescriptive language, not passive language
- Engage suppliers early and oblige all new and existing contracts to only deliver tuna according to the policy
- Make the key elements of the policy publicly available online
- Train staff on content and implementation of the policy
- Promote only products that meet the policy
- Regularly work with suppliers to find better alternatives
- Conduct regular reviews of the policy and monitor progress
- Have your products audited against your policy regularly

Transitioning to truly responsible procurement policies and practices that will lead to meaningful and positive change in our oceans requires attention to the following key areas. This list includes key issues to consider and is not a comprehensive list of sourcing requirements.

1

SUSTAINABILITY

- Source from only healthy (not overfished, experiencing overfishing, or declining) well-managed tuna stocks
- Source from only best-practice, more selective fishing methods with a minimal impact on other marine life (eg. pole and line, troll, handline)

2

TRACEABILITY

- Ensure all tuna can be tracked from ship to can to shelf
- Conduct internal and third party annual audits at key points in your supply chain that include random spot checks for both the sustainability and social accountability requirements of your company's policy

3

SUPPORT FOR MARINE PROTECTION

- Publicly support the creation of marine reserves
- Do not source tuna from proposed marine reserves such as the Pacific Commons of the Western and Central Pacific Ocean, established marine reserves or marine protected areas, or fishery exclusion zones

4

EQUITY AND SOCIAL ACCOUNTABILITY

- Source from coastal state-owned fisheries and processing operations where possible
- If not, source from companies that ensure coastal states are paid fair access returns for their resource
- Do not source from any company associated with abuses against labour laws
- To avoid companies that fail to prohibit forced, child, discriminatory or otherwise unfair working conditions, at a minimum, only source from vessels, companies, canneries and processors that operate in full compliance with international labour standards, as reflected in, among others, the International Labour Organisation (ILO) Core Conventions, the ILO Work in Fishing Convention 2007 (No. 188), and ILO Work in Fishing Convention)
- Set standards that suppliers must meet to ensure human rights are being upheld for workers involved in the supply chain, with attention given to migrant workers



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5

LEGALITY

- Do not source tuna that was transhipped at sea
- Do not source tuna originating from vessels and/or operators blacklisted on <http://blacklist.greenpeace.org>
- Source tuna from vessels with 100% independent observer coverage.

6

DRIVING CHANGE

- Support research and development programmes on sustainable fisheries
- Continuously work with stakeholders (suppliers, fishing industry, government, NGOs, scientists) to improve the management and sustainability of the fisheries that are sourced from
- Advocate for change in fisheries management bodies

7

CUSTOMER INFORMATION AND EDUCATION

- Label all products with key information including where and how the tuna was caught, the species common name, and the country of processing
- Provide supplemental species, product and sustainability information online and in stores through flyers and POS information

1. Pew Charitable Trusts, *Netting Billions: A Global Valuation of Tuna* (May 2, 2016).
2. The Pew Charitable Trusts. *Netting Billions: A Global Valuation of Tuna in the Western And Central Pacific Ocean*. Fact Sheet. (September 23, 2016.) <http://www.pewtrusts.org/en/research-and-analysis/fact-sheets/2016/09/netting-billions-a-valuation-of-tuna-in-the-western-and-central-pacific-ocean>
3. The IUCN Red List of Threatened Species. Version 2016-2. <www.iucnredlist.org>. Downloaded on 21 October 2016. <http://www.iucnredlist.org/search>
4. Trade map <http://www.trademap.org>
5. *Slavery and Labour Abuse in the Fishing Sector: Greenpeace Guidance for the Seafood Industry and Government*. Rep. Greenpeace International, 26 Aug. 2014. Web. 03 Aug 2016. <<http://www.greenpeace.org/international/en/publications/Campaign-reports/Oceans-Reports/Slavery-and-Labour-Abuse-in-the-Fishing-Sector/>>.
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