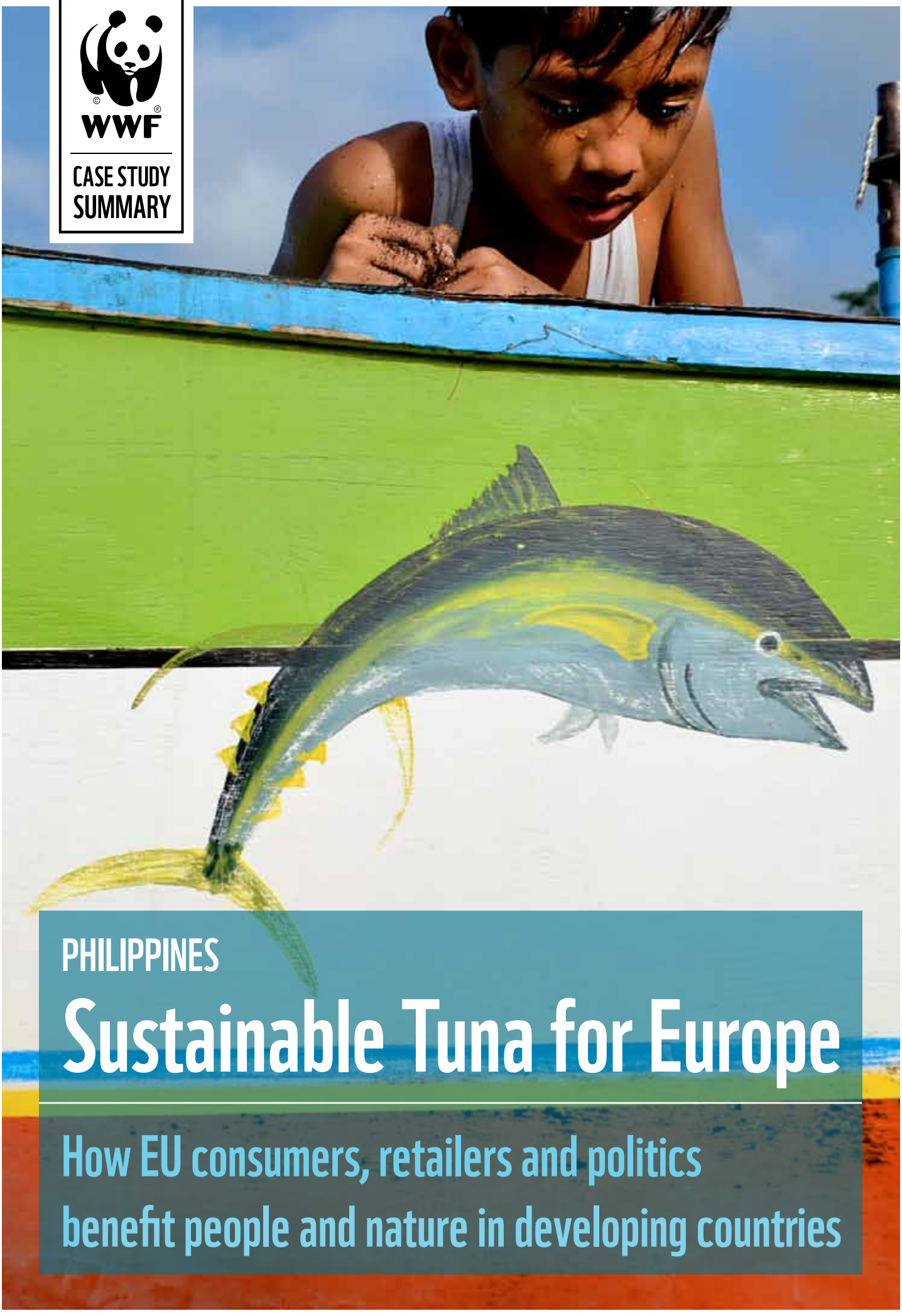

CASE STUDY SUMMARY

PHILIPPINES

Sustainable Tuna for Europe

How EU consumers, retailers and politics benefit people and nature in developing countries

“Europe is the world‘s biggest
market and importer of fish and seafood,
consuming about 12 million tons a year.
A huge global impact on nature and people.

But there is a sustainable seafood choice for eveyone
to support oceans and millions of people who depend on them.
Consumers, retailers and politicians just need to play their part.”

Sabine Gisch-Boie, WWF Austria

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Improving Tuna Fisheries, Enhancing Livelihoods

© Juan Vilata / WWF

In the Philippines, a unique public-private partnership facilitated by WWF is helping some **6,000 tuna fishermen** to earn a decent, **sustainable living** – even in the face of large-scale commercial fishing and dwindling fish stocks:

The Partnership Program Towards Sustainable Tuna (PPTST) [1]

© Brian Skerry / National Geographic Stock / WWF

It is part of WWF‘s work to ...

... **reduce overfishing** and
... **promote sustainable fisheries**

... through market incentives. Spurring fishers, processors, buyers amd retailers to commit to certified fisheries and to purchase and sell seafood products that can be traced back to their origin.

© Georg Scattolin / WWF

By training fishermen in *Lagony Gulf* and *Mindoro Strait* how to handle and process tuna in order to meet Grade A standard. This market-driven approach to fisheries management has **improved income** while increasing the **sustainability of the fishery**.

The fishermen are encouraged to focus on the **quality of fish catch**, allowing them to stay in step with global market demands while participating in the conservation and management of resources for long-term sustainablility.

© naturepl.com / H. & J. Eriksen / WWF

Since many important fisheries are not yet managed well enough to meet highest standards (e.g. MSC - Marine Stewartship Council), WWF also helps fisheries to take part in fishery improvement projects to meet the challenge of improving their operations and eventually achieve **MSC certification**.

[1] The ‘Partnership Program Towards Sustainable Tuna’ (PPTST) is a partnership between WWF Germany, WWF Philippines, Deutsche Investitions- und Entwicklungsgesellschaft (DEG) Development Bank, as well as the companies Bell, Coop, Marks and Spencers, New England Seafood, Sainsburys, Sea Fresh and Waitrose, and is working in close collaboration with local partners including the national authorities and the Bureau of Fisheries and Aquatic Resources (BFAR) in two project regions.

Sustainable Tuna for Europe

How EU market demand and political pressure benefit people and nature in developing countries – The Philippine case

WWF's 'Partnership Program Towards Sustainable Tuna' (PPTST), a Fishery Improvement Project, focuses on the artisanal, municipal tuna sector in two sites in the Philippines – *Lagonoy Gulf* and *Mindoro.*

The PPTST harnesses market power and consumer demand to promote sustainably caught ‚Grade A' tuna and support low-impact fishing methods like artisanal fishing with handline reels. It supports the transition to sustainability of two artisanal handline fisheries for Yellowfin Tuna.

The case study analysed how important this sector is at a macro level (income and exports) as well as at the micro level (community and households). Is the small-scale tuna sector actually able to tap into the global market? And if so, are such efforts socio-economically/ environmentally beneficial?

The case study demonstrates that **global demand for sustainably caught ‚Grade A' tuna can have a positive impact on the income of artisanal fishermen and result in better management of marine resources – especially in delevoping countries.**

Increasing demand for sustainably caught fish amongst **European consumers** and **corporate buyers**, as well as political pressure exerted by **European policy makers** led to **sustainable development of both marine resources and livelihoods** of people who depend on them.

Growing long-term demand for sustainably caught tuna will encourage developing countries' governance systems to adapt, scale up financial support, and provide avenues for replication for other local governments.

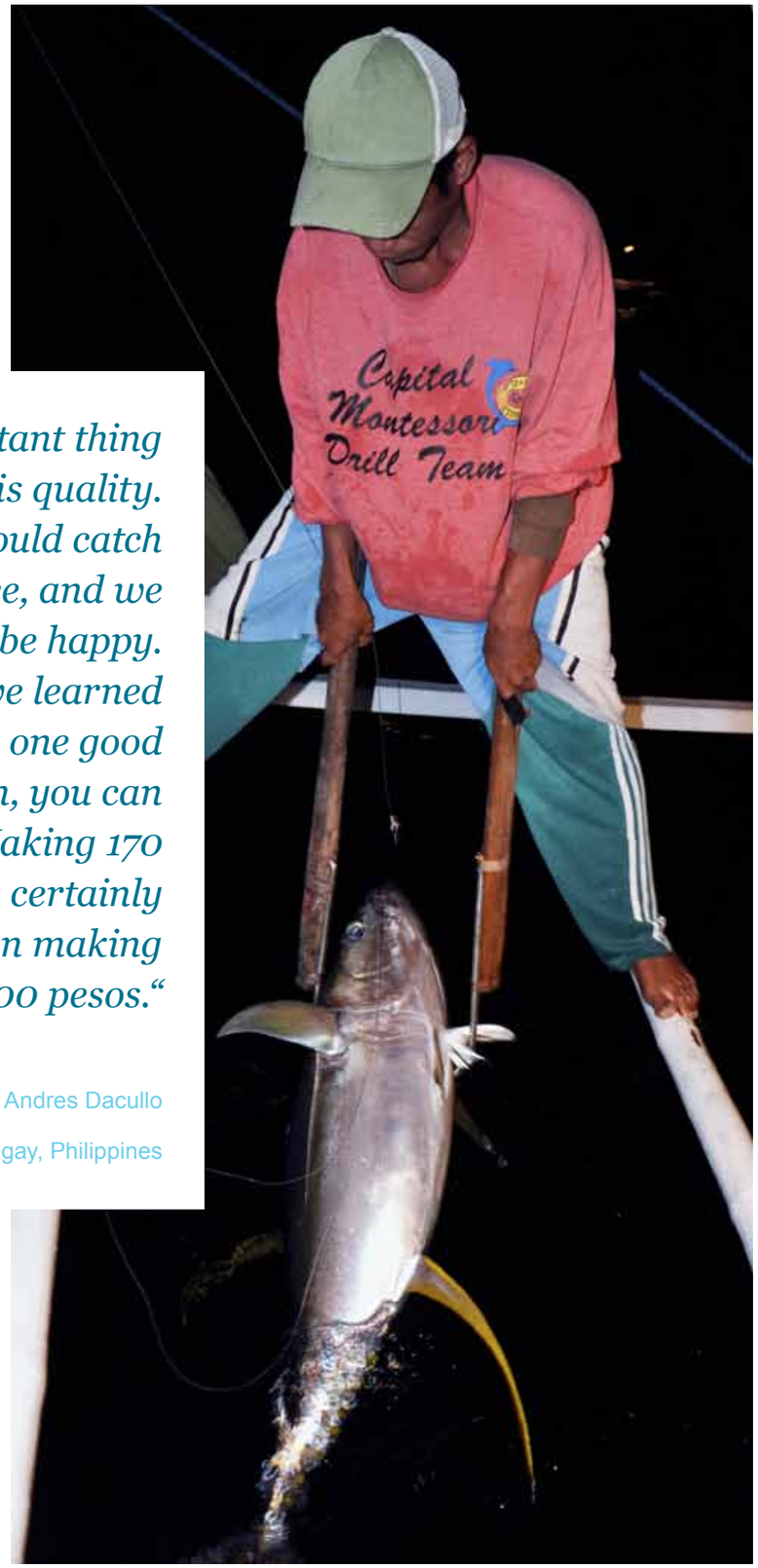
Key Findings

Positive impacts across the whole value chain have been generated by the **EU demand (corporate buyers and consumers) for sustainable ‚Grade A' tuna from the Philippines**.

This is evident through the analysis of the sites part of WWF's Fishery Improvement Project PPTST in *Lagonoy Gulf* and *Mindoro.*

Demand for sustainable tuna can result in changes at the very origin of the supply chain: the fishers, their fishing operations and way of life, as evidenced by

- positive ecological impacts (recovery of fish stocks)
- positive socio-economic impacts on
  - gender equality
  - livelihoods (better income)
  - strengthening civil society
- positive governance impacts and increased investments of national and local governments



The most important thing we learned is quality. Before, we would catch one, two, three, and we still wouldn't be happy. Now, we have learned that with one good Grade A fish, you can earn more. Making 170 pesos a kilo is certainly better than making 100 pesos."

Andres Dacullo

Fishermen from Barangay, Philippines

Indicators and Players for Change

Based on the findings of the case study, it can be stated that **European consumers** and **European corporate buyers** choosing fish from a fishery improvement projects can have the following positive impacts on fishing communities in developing countries:

- sustainable and legal fishing lead to sustainable fish stocks and fair competition
- sustainable livelihoods and higher income
- civil society empowerment
- improved gender equality

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EU Laws & Controls

Governance of the sector has improved overall, as shown by the swift passage of the National Philippine Fisheries Code incentivized by the issuance of a so-called EU 'yellow card'.

It corresponds to a formal warning from the EU to the Philippines for failing to take sufficient measures to fight illegal, unregulated, and unreported (IUU) fishing.

The fear of losing the EU as a highly important market – by issuance of a 'red card' and import ban – prompted swift reforms.

Retailers & Corporate Buyers

Benefits from exporting are starting to be felt, with price premiums being offered for export-quality tuna. Export of tuna is more economically profitable compared to selling it on the domestic market, mainly because of the price difference.

Consumers

Demand for sustainable tuna is the crucial driver for more sustainable sourcing policies of corporate buyers.

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Europe Makes the Difference - Drivers for Change

Philippine Tuna

Tuna is the major fisheries commodity in the Philippines. It was the **Philippines' number one fishery export** in 2013 with the volume of trade at 166,000 MT for a value of 509 million Euros. **Almost 50% of this value consists of exports to the EU.**

Five species of tuna (yellowfin tuna, skipjack, eastern little tuna, bigeye tuna and frigate tuna) form the bulk of catches.

Yellowfin tuna accounts for an average of 40% of the average annual production, amounting to around 350,000 Metric Tons (MT). Catches of yellowfin tuna in the Western and Central Pacific Ocean reached 536,000 tons in 2013, to which the Philippines domestic fisheries contributed about 47,000 tons.

Yellowfin tuna supports the Philippines' domestic food supply, while also being the country's biggest seafood export commodity at 260 million Euros per year.

A variety of **fishing gears** are used to catch tuna: purse seines, ringnets and handlines, with handlines being the most common type of fishing in both municipal and commercial fishing sectors in the country.

European Market

The Philippines are now the **biggest supplier of tuna to the EU.** 82% are exported prepared/ preserved such as canned tuna.

Increasing demand for sustainably caught fish amongst **European consumers** and **corporate buyers**, as well as political pressure exerted by **European policy makers** encourage sustainable development.

For the benefit of marine resources and livelihoods of people.

Background Infromation

The **Fishery Improvement Project (FIP) PPTST** supports the goal of Marine Stewardship Council (MSC) certification where outputs are expected to contribute to fisheries management both within the Philippines' tuna sector as a whole and for handline fisheries in particular.

The interventions consist of four major components:

- community and institutional development
- fisheries governance improvement
- supply chain management
- MSC certification

The FIP successfully initiated the registration and licensing of tuna fishers, vessels and gears to minimize bycatch and illegal fishing.

WWF conducted a series of hands-on trainings and activities to improve tuna quality and traceability along the supply chain in order to ensure that exported tuna continually meets international quality standards. These trainings also emphasized the importance of adhering to fishing regulations and the monitoring of fishing efforts through licensing and registration.

A t**raceability system pilot scheme** was developed. Since the beginning of the FIP, three MSC pre-assessments have been conducted by an independent consultant to asses the ecological sustainability of the fishery including:

- sustainable fish stocks: fishing activity is at a level which ensures indefinite continuation
- minimizing environmental impacts: fishing operations are managed to maintain the structure, productivity, function and diversity of the ecosystem
- effective management: the fishery complies with relevant laws and has a management system in place that is responsive to changing circumstances

The fishery is planned to enter full certification in 2017. Lack of capital and entrenched relationships of fishers with casas still plague the sector. Likewise, increasing competition from the commercial sector and thus increasing fishing pressure still need to be addressed.

Some shift from commercial fishing using active gears to handline fishing has been observed as a result of a desire to embracemore environmentally sound fishing but also to take advantage of higher profits in the export market.

Case Study Recommendations

- Preserving the achievements of the Fishery Improvement Project PPTST regarding its ecological, economic, and social sustainability of yellowfin tuna
- Seeking to replicate the FIP framework in other areas and/or fishery sub-sectors
- Ensuring a more equitable distribution of income across the supply chain
- Completion of a site-based tuna management plan
- Local government institutionalizations of traceability criteria, including catch documentation, and implementation of the amended Fishery Law in order to address issues of overexploitation that persist throughout the fishery sector
- Improved financial literacy among fishers

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More Info: www.fishforward.eu

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Sustainable Philippine Tuna for Europe - for the Benefit of Nature and People

800 MILLION PEOPLE

Worldwide, more than 800 million people depend on fish for food and income. Most of them live in developing countries.

OVERFISHING

90% of global fish stocks are fully fished or overfished

PHILIPPINE TUNA

The Philippines are the biggest suppliers of tuna to the EU. Yellowfin tuna supports domestic food supply and is the main seafood export commodity worth 260 million EUR a year.

EUROPE

Europe is the biggest market and importer of seafood worldwide. More than half of fish imports come from developing countries.