

## 1. Background

Food production is one of the primary causes of biodiversity loss through habitat degradation, overexploitation of species such as overfishing, pollution and soil loss (LPR, 2016). Seafood (or Fish & shellfish), as a category of food, is an important source of protein for mankind. According to the UN FAO report<sup>1</sup> in 2020, it provides around 17% of global animal protein intake and 7% of all protein consumed in 2017. Furthermore, fish provided more than 3.3 billion people, in particular those that live in coastal communities, with almost 20% of their average per capita intake of animal protein. The global fisheries and aquaculture sectors produced over 179 million tonnes of seafood in 2018. Although the production of fish, seafood, and algae is still dominated by extractive wild capture fisheries, global aquaculture (aquatic farming) has more than doubled since the start of the millennium and is positioned to become the primary contributor to seafood production in the near future.

However, the IPBES<sup>2</sup> report identified fishing activities as the greatest threat to oceans biodiversity in 2019 and the UN FAO reported the global fish stock status has worsened in the past 40 years in which underexploited fish stocks have reduced from 26% to 7% since the 1970s<sup>3</sup>. Rough estimates indicate that unmonitored (IUU) fishing lands an additional 11 – 26 million tonnes of fish each year, representing 12 – 28.5% of global capture fisheries production. Aquaculture for food does not come without problems. Conversion of mangrove forests or coastal farmland into shrimp farms, use of edible fish for fish feed, pollution of the water column and sediments by the use of excessive feed, escape of non-native species and other identified risks have resulted in various negative impacts on the aquatic environment. Furthermore, reports of human rights abuses and illegal activities (fishing and trading) in the seafood sector have been frequently published in recent years with some accusations being linked to UK based companies.

Subsequent to the EAT-Lancet report<sup>4</sup> in 2019, the EAT Coalition has undertaken a Blue Food assessment<sup>5</sup> to assess the impacts from capture fisheries and aquaculture in relation to the planetary health including global biodiversity, seafood demand, climate change and other issues. In the Blue Food Assessment scoping report, it highlighted one key challenge is to ensure that trade policies are aligned to support policy objectives relating to sustainability of resource use and food security.

Seafood consumption in the UK has an immense global footprint; as a nation we imported seafood from almost 90 different countries in 2019. Within the last decade, the seafood trade in the UK has increased by 47% from near £3,600 million in 2010 to almost £5,300 million in 2019. Seafish reported that 97% of UK households consumed seafood and was estimated to be worth £6.16 million of retail value in 2017. UK fisheries meet part of the UK demand but over 60% of our seafood currently consumed is imported from other parts of the world.

There is an urgent need to understand the UK's seafood footprint both domestically and beyond our national jurisdiction and its impacts on our oceans and human rights of the seafood supply chain. While impacts of individual seafood supply chains like tuna may have been well documented by seafood guides or human right abuse reports, the overall footprint of UK's imported seafood re global biodiversity loss or climate change contribution and their associated risks have not be systematically reported. The UK government currently does not have a strategic approach on how to reduce its global seafood footprint on our oceans and there is not a singular regulatory framework to prevent overfished

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<sup>1</sup> FAO Sofia 2020: <http://www.fao.org/publications/sofia/2020/en/>

<sup>2</sup> IPBES Global assessment: <https://ipbes.net/global-assessment>

<sup>3</sup> FAO Sofia 2020: <http://www.fao.org/publications/sofia/2020/en/>

<sup>4</sup> EAT-Lancet REPORT: <https://eatforum.org/eat-lancet-commission/eat-lancet-commission-summary-report/>

<sup>5</sup> Blue Food Assessment: <https://www.bluefood.earth/>

or high impact (e.g. deforestation of mangrove, threatening to endangered species, etc.) seafood entering the UK market, with the possible exception the transposition of the existing EU IUU regulation.

With the UK leaving the EU, meaningful legislative measures on trade policy requires public policy makers to have access to current, good quality, relevant baseline information on our overseas seafood supply chain risks. Information such as trade volumes, countries of origin, supply chain actors (including importers, traders and investors), and sustainability credentials of both commodities and companies are critical to advocating for, designing, implementing and monitoring effective policy interventions.

It will also be important to understand how the sustainability credentials of domestic commodities and companies as well as internationally sourced products.

## 2. Project Scope

This report will focus on seafood commodities for direct consumption and marine species that are used as feed in aquaculture.

Seafood commodities are categorised into the following groups: 1. whitefish (e.g. cod, haddock), 2. medium/small pelagic (e.g. herring, mackerel), 3. large pelagic (e.g. tuna, swordfish), 4. cold water crustacean (e.g. prawn, lobster), 5. warm water crustacean (e.g. shrimp, crab), 6. molluscs (e.g. scallop, squid), and 7. salmonids (e.g. salmon, trout) as well as forage species and tropical reef fish (e.g. wrasse, Bream) (if found in the UK supply chains).

## 3. Overarching Purposes:

This project seeks to mirror the successful model of supply chain policy development for agricultural and forest-risk commodities, such as those covered in WWF's and RSPB's Risky Business Reports (2017 and 2020). This report focuses on ocean-risk commodities such as seafood, in support of WWF-UK's Food goal. At the same time, the project also seeks to replicate and upscale across the broader suite of ocean-risk commodities in multiple WWF countries (e.g. EU, India and China) in support of delivering the WWF Ocean and Food Practices work streams

To inform WWF-UK's seafood and fisheries policy development in order to align with WWF's Food Goal target of bringing about systemic change in our food system, and halving the UK's food system impacts by 2030 through consumption and production driven ocean biodiversity loss (e.g. overfishing, habitat destruction, endangered species mortality), through seafood supply chain mapping at the national or seascape/sea basin level of the sourcing countries.

## 4. Aims:

Aligning with the WWF & RSBP 2017 "[Risky Business](https://www.wwf.org.uk/sites/default/files/2017-10/WWF%20and%20RSPB%20-%20Risky%20Business%20Report%20-%20October%202017.pdf)<sup>6</sup>", "[Risky Business Technical](https://www.wwf.org.uk/sites/default/files/2017-10/WWF%20and%20RSPB%20-%20Risky%20Business%20Report%20-%20October%202017.pdf)<sup>7</sup>" reports and 2020 "[Riskier Business: the UK Overseas Land Footprint](https://www.wwf.org.uk/riskybusiness)<sup>8</sup>" report to assess the risks of UK's footprint on global

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<sup>6</sup> Risky Business: <https://www.wwf.org.uk/sites/default/files/2017-10/WWF%20and%20RSPB%20-%20Risky%20Business%20Report%20-%20October%202017.pdf>

<sup>7</sup> Risky Business Technical Report: <https://www.wwf.org.uk/sites/default/files/2017-10/WWF%20and%20RSPB%20-%20Risky%20Business%20Report%20-%20October%202017.pdf>

<sup>8</sup> Riskier Business: <https://www.wwf.org.uk/riskybusiness>

forests as well as the [WWF Halving the Footprint of Production and consumption](#)<sup>9</sup> report on actions and outcomes, the aims of this report are:

1. To provide high level risk assessments (social and ecological/ecosystem/biodiversity loss (e.g. IUCN, CITES, etc.), and economic impacts where possible) of overseas seafood footprint (imported seafood commodities as set out in the Scope section) of the UK at the global level.
2. To provide similar high level risk assessment on similar domestically produced seafood commodities as set out in the Scope section of the UK at the national level.
3. To engage and inform the UK government on trade policy regarding the global footprint of the UK's seafood consumption and responsibility to maintain high environmental and social standards in future trade agreements to combat the global marine biodiversity loss.
4. To engage and inform the UK seafood sectors in order to reframe the seafood sourcing debate from individual certifications to a holistic ecosystem and seascape governance approach to combat global marine biodiversity loss.

#### 5. Objective:

The objectives of this report are:

1. To assess the extent to which the UK supply chains for key imported seafood/ marine commodity groups (set in Project Scope) contribute towards negative social and oceans biodiversity/ ecological/ ecosystem impacts; where possible, economic impacts could be assessed;
2. To assess the extent to which UK seafood domestic production set in Project Scope, where applies;
3. To identify relevant data gaps and supply chain 'blind spots' in the imported UK seafood supply chain;
4. To generate national and/or regional ocean-risk scores based on points 1-3 above;
5. To develop recommendations on how key stakeholders (i.e. the UK government, policy makers, companies, traders) can reduce and mitigate the risks identified within the UK supply chain, toward a scalable approach to halving the impacts of the UK's seafood consumption and production on oceans, including the UK EEZ;
6. To develop recommendations for consumers to increase the awareness of the UK's ocean seafood footprint.

#### 6. Focal topics and methodology:

The priority topics of interest of this report are:

- 1) A national physical supply chain map:
  - a) Identification of the total volume and major uses of each commodity group imported into in the UK.

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<sup>9</sup> [WWF Halving the Footprint of Production and consumption](https://wwfint.awsassets.panda.org/downloads/halvingfootprint_report_wwf_metabolic.pdf):  
[https://wwfint.awsassets.panda.org/downloads/halvingfootprint\\_report\\_wwf\\_metabolic.pdf](https://wwfint.awsassets.panda.org/downloads/halvingfootprint_report_wwf_metabolic.pdf)

- b) Identification of major companies involved in each commodity supply chain (importers, traders, users, producers);
  - c) Identification of the percentage of total imported commodities that are certified and the percentage that meet international human rights standards.
  - d) Identification of total volume and major uses of each commodity group produced by domestic UK fisheries and what percentage of this is certified and the percentage that meets human rights standards
- 2) Identify Critical data gaps: identification and prioritization of supply chain 'blind spots' (i.e. areas where supply chain or finance data is not available due to supply chain complexity and/or lack of transparency).
  - 3) national and regional 'seafood risk' measure or score: building on points 1 – 2 above; assessment of the national ocean footprint and/or risk.
  - 4) A national stakeholder overview: characterization and analysis of UK government, business and consumer/citizen on the awareness of UK's overseas and domestic seafood supply chain risk issues; corporate and public policy commitments and achievements.

## 7. Deliverables:

The outputs of this study will be:

1. A full report including technical components with key findings (for (a) imports and (b) domestic components) under the four focal topics above for the UK market; and recommendations/briefing for UK stakeholders including policy makers, corporates/companies and consumers outlining a systemic approach towards reducing the global footprint of the UK's seafood consumption and production (guide on length?).
2. A public facing executive summary (no more than 8 pages of text) with appropriate graphics, will also be produced.

The methods used in this study should be replicable and scalable, such that the baseline data generated in this project can be compared against data gathered in 2023 and can be adopted and upscaled by wider WWF offices to assess their national overseas seafood footprint.

The consultant will deliver a report of sufficient quality and depth so that the aims and objectives of the project are answered.

The consultant will provide, within the final report, a full description of the data and the date on which it was collected. Any uncertainties/limitations surrounding the accuracy of the data should also be highlighted. The final report and the data will be owned by WWF-UK but attributed to the contractor.

## 8. Consultant identification

Interested consultants should submit a project proposal by 17 January 2021 and clearly outlines the proposed methodologies and how they meet all objectives listed in the 'Objective' section and that covers all the Priority Topics in the Focal topics & methodology sections. The proposal should demonstrate the alignment of this study with the above mentioned Risky and Riskier Business reports. The proposal should

also provide a realistic but ambitious timeline, resources allocation on delivering the report, CVs with relevant experience and any applicable charging.

## 9. Project Management

The project will be managed professionally and ensure timely completion of the deliverables.

Communication with WWF-UK will be regular and include in-person and/or remote (e.g. email, telephone, Zoom, etc.) communications as required. At a minimum, a biweekly verbal update will be anticipated and there to be a presentation of interim findings/project updates. If a need is identified for *ad hoc* meeting(s), then this will be arranged between WWF-UK and the consultant.

Meetings (telecoms) may be required with other consultants who are undertaking similar work in the WWF network; this will be advised as the projects progress.

Coordinated by the Project manager, an internal WWF working group will be set up to provide guidance throughout the production of the report.

Project Manager: Clarus Chu, Seafood Manager, WWF-UK

Email: [cchu@wwf.org.uk](mailto:cchu@wwf.org.uk)

## 10. Budget and Fee Schedule and Payment:

Up to £28,000 (+VAT) and the proposals should include total cost.

## 11. Contacting:

WWF-UK would prefer to contract these services using the attached standard terms and conditions.

Your response should indicate your acceptance of these terms or include details of any alternatives that you would propose.

## 12. Timeframe:

The reports is anticipated to be delivered within 3 months upon the contract is granted to the successful contractor(s).