
From Sea to Can: Thailand Canned Tuna Ranking

What's
inside the
can?



Contents

01

Introduction

06

Tuna brand profiles

03

Scoring criteria

19

A final note on
labor and human
rights issues in
the tuna industry

05

Thailand's canned
tuna ranking

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Page 2 - 18

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300,000 sea turtles and at least 160,000 seabirds and millions of sharks die annually in longline fisheries.¹



Only 16% of bigeye tuna remains in the Western Central Pacific Ocean ²

The U.S. State Department has reported labor abuse on fishing vessels in more than 50 countries, including Thailand.³



Be aware before opening a can.

01

Introduction

Tuna are among the world's most popular and commercially valuable fish. But this global consumer appetite comes at a cost. Our oceans continue to suffer from overfishing, destructive fishing, and illegal fishing.



Populations of the ocean's top predators – including some species of tuna – have dropped by as much as 90% over just the past 50 years. Bycatch – where unintended victims like sharks, turtles, and juvenile tuna are caught in the process of fishing, then thrown back into the sea dead or dying – remains a scandalous problem. Wastefully tossing such large amounts of fresh seafood overboard

threatens marine ecosystems as well as global food security. Illegal, Unreported, and Unregulated (IUU) fishing in the tuna sector is rampant, particularly in Southeast Asia. Worse, shocking human rights violations are often interlinked with illegal tuna fishing. But it doesn't have to be this way. Instead of being part of the problem, tuna companies can seize the opportunity to join as part of the solution.

Thai consumers play a key role in preserving tuna resources for the benefit of future generations. The Thai canned tuna market is a 700 million baht industry.



Some of the world's largest tuna companies are based in Southeast Asia, because most of the world's tuna is either caught in the region or processed here. Indeed, many of these global companies are based here in Thailand. Greenpeace has already evaluated the performance of some of these companies on an export level, by examining the product sent to countries with high levels of tuna consumption (e.g., U.S., UK) and informing those consumers about the sustainability of the canned tuna found in their local supermarkets. However, people based in the very region in which most of the world's tuna are caught have had very little information about their domestic purchasing options. Until now.

Thai consumers play a key role in preserving tuna resources for the benefit of future generations. The Thai canned tuna market is a 700 million baht industry. Greenpeace's role is to inform Thai consumers about the practices of each brand of canned tuna for sale in domestic grocery stores, and to rank these brands on criteria such as traceability, sustainability, and equity. To do well, a tuna company's policy should ensure that tuna is traceable from vessel to shelf, that the tuna comes from healthy stocks and is caught responsibly, and that the company has strong labor and human rights standards. Furthermore, that company should rely on independent, third-party auditors to make sure that it is following its own stated policy throughout all of its operations.

While criteria are fully explained on the following page, below are three key concepts:

Traceability: companies should be able to track their tuna through all parts of the supply chain, and know exactly where and how the tuna was caught. This ensures sourcing requirements are being met.

Sustainability: a commitment to selling sustainable and equitable tuna through a policy with clear sourcing requirements that exclude tuna from unhealthy stocks, destructive fisheries, and socially irresponsible companies.

Equity: companies should know who is catching its tuna and how they are being treated. They should also be committed to ensuring the well-being of workers throughout its supply chain and should be actively working to end human rights abuses and human trafficking in their supply chain.

To gather this information, Greenpeace sent surveys to several major tuna brands that sell canned tuna in Thailand. In addition to the survey, Greenpeace conducted external research to learn as much as possible about the policies and practices of the various companies.

How do Thai tuna brands perform?

Find out on page 5!

Want to learn more about our criteria? [Read on!](#)

02

Scoring Criteria

Detailed surveys were sent to each of the fourteen canned tuna brands profiled in this report. The good news is that two-thirds of the brands responded to the surveys. For those that declined to respond, this unfortunately left several unresolved areas where we could not award credit. Nevertheless, Greenpeace applauds those that participated in the process, and encourages all to improve over the course of the next year. There were seven criteria used in the survey:





01

Traceability

Is the tuna traceable from sea to can to store shelf?

Are audits conducted to ensure the information is accurate?



02

Sustainability

looks at both the status of the tuna species and how it was caught.

Health of tuna stocks.

Does the tuna come from stocks that are healthy and not overfished or being fished beyond their ability to rejuvenate?

Fishing methods used.

Is the tuna caught using methods that avoid catching other marine life like sharks and turtles and baby tuna, such as pole and line? Or is it caught using indiscriminate fishing methods such as conventional long line fishing and purse seine net fishing using fish aggregating devices (FADs)?



03

Legality

pertains to illegal, unreported and unregulated (IUU) fishing. It examines whether the company can ensure that IUU fish does not enter its supply chain. Also, does the company allow transshipment at sea (a problematic practice that can allow the mixing of legal and illegally caught fish, and where a lot of human rights abuses can occur) or does it conduct business with companies that have a record of prior prosecutions related to the capture and trade of fish?



04

Equity

ensures the protection of local workers and communities while ensuring a fair return of profits in the Southeast Asian region. Does the company know who is catching its tuna and how they are being treated? Is it committed to ensuring the well-being of workers throughout its supply chain? Is it actively working working to end human rights abuses and human trafficking in their supply chain?



05

Sourcing Policy

shows company commitments and implementation on sustainability. Does the company have a written sustainability and equitability policy with clearly defined canned tuna sourcing requirements? Does it source from suppliers that catch endangered or vulnerable species or from areas which are known to be overfished? Is the company working towards a time bound goal of avoiding unselective or destructive fishing methods?



06

Transparency and Customer Information

measures whether the company is increasing transparency and promoting informed customer choice. How easy is it for customers to know what is in the can? Can they find additional product information easily?



07

Driving Change

shows if the company supports or invests in the development of more sustainable and equitable fishing. Does the company avoid sourcing from proposed and existing marine reserves? Is the company proactive in improving the industry, lessening its impact, and addressing the challenges our oceans face?

03

Thailand's Canned Tuna Ranking

The brands were ranked on a 1-100 scale
(0-39 = failed, 40-69 = fair, and 70-100 = good).

Of the fourteen brands that we evaluated from Thailand's domestic market, five received failing scores and nine received fair scores. Not a single brand received a good score, demonstrating the substantial amount of work yet that still needs to be done.

Rank	Brand . Manufacturer	Overall Rating
1	TCB / Tropical Canning (Thailand) PCL.	Fair
2	King's Kitchen / Premier Canning Industry Co., Ltd.	Fair
3	Nautilus/ Pataya Food Industries Ltd.	Fair
3	Sea Crown/ Pataya Food Industries Ltd.	Fair
4	Sealect / Thai Union Frozen Products PCL.	Fair
4	Ocean Wave / Thai Union Frozen Products PCL.	Fair
5	Tesco-Lotus/ Pataya Food Industries Ltd.	Fair
6	Aro / Pataya Food Industries Ltd.	Fair
7	Brook / Southeast Asian Packaging and Canning Co., Ltd.	Fair
8	Tops/ Thai Union Frozen Products PCL.	Failed
9	Ayam / Thai Union Frozen Products PCL.	Failed
10	Big C / Thai Union Frozen Products PCL.	Failed
11	Home Fresh Mart / Thai Union Frozen Products PCL.	Failed
12	Roza / Hi-Q Food Products Co., Ltd.	Failed

04

Brand Profiles

The domestic Thai canned tuna industry is primarily dominated by a few large companies, who both operate their own brands and directly supply tuna to other brands. Brands that are sourcing from the same company may have identical scores. However, sometimes these brands will have different scores because they have different sourcing standards from one another, even when primarily sourcing from an identical company.

Note that all tuna brands performed poorly on supplying enough customer information. For the most part, the Thai companies profiled did not even tell customers what species of tuna was in the can, and provided zero information on sustainability. This is an area in which we expect all brands to improve over the coming years. Below are the brand profiles, listed in order of overall score (best to worst).



Know your tuna

Whether you're a cook, consumer, or ocean lover, it's worth knowing how popular tuna types are faring:



Albacore: Found in various forms; canned, smoked and fresh. Near-Threatened status with all populations in decline and some already overfished.



Bigeye: Tuna steaks, sushi or sashimi. Less valuable small bigeye can also be canned. Official status: Vulnerable – just below Endangered, with all populations in decline and some already overfished.



Bluefin: The most iconic and commercially valuable of all tuna. There are actually three different types: Atlantic, Pacific and Southern. Found in high-end restaurants as sashimi or in sushi. On the brink of collapse. If current trends continue, the species will soon be commercially extinct in the Pacific.



Yellowfin: Mostly tuna steaks, sashimi or sushi but also in cans. Official status: Near Threatened, with all populations in decline and some already overfished.



Skipjack: Mostly found in cans but also in cat food. Often labelled “light tuna”. Not yet overfished, but if current catch rates continue it could be. Sometimes small bigeye and yellowfin are accidentally mixed with skipjack and end up in the same can.

No.1

TCB



Background

Tropical Canning (Thailand) Public Company Limited's main product is canned tuna. 70% of its raw materials are imported from abroad, and the company's clients are 96% foreign customers (primarily the U.S., Canada, and Australia).⁴ Nevertheless, it does provide some product to the domestic market.

Comments

TCB was very forthcoming in its participation in the survey process, and it has potential to improve rapidly. It is also the leader of the first canned tuna ranking for the domestic Thai market, and deserves a round of applause for this achievement. However, while TCB's is No. 1 rank may put it ahead of its peers, it is far short of the "good" ranking. In other words, there is a lot of work to be done. Indeed, TCB sells sustainable tuna in other countries (such as Australia), so it should be able to draw on its experience in other countries to offer similar products in Thailand. TCB sells yellowfin and tonggol, and neither species is known for having robust stock levels.

Strongest areas

TCB performed best in overall traceability, legality, and its sourcing policy. It provided substantial documentation to back up its claim that it understands where its tuna is from. Greenpeace encourages TCB to keep up the good work and to maintain a vigilant eye on its supply chain. TCB does not source from vessels listed on official blacklists, does not transship tuna at sea, and refuses to do business with

companies that have been prosecuted for IUU fishing. A publicly-available version of its sustainable seafood policy can be found on its website - something that most other brands lacked.

Needs improvement

TCB struggled with sustainability and driving change. The company sources yellowfin tuna and tonggol (two species that have problematic overall stock levels), and catches these species in an unsustainable fishing method (FAD-caught purse seine) that has problematic levels of bycatch. The company should consider switching to a greater proportion of skipjack tuna sourcing, using more sustainable fishing methods such as FAD-free purse seine or pole-and-line. The company needs to be more proactive when it comes to finding ways to lead in the sector.

Bottom line

TCB's openness and firm grasp on its internal traceability means that this company rests on a solid foundation by which to improve on its sourcing of more plentiful species (such as skipjack) and using more environmentally sustainable fishing methods. Since it has a handle on its supply chain, it should be able to make future reforms with a greater degree of speed and certainty than many of its competitors. While TCB leads the pack in regards to its competitors in the domestic Thai market, there is still ample work ahead before it can be considered to be ranked "good."

No.2

King's Kitchen



Background

King's Kitchen is distributed by Premier Marketing and manufactured by its subsidiary Premier Canning Industry Co., LTD. (PCI). PCI manufactures and sells pouched and canned ready-to-eat tuna. Most tuna products are exported to overseas markets in Asia, Europe and the Middle East. Domestically, it sells Yellowfin tuna in sunflower oil.⁵

Comments

King's Kitchen participated in this year's survey process. This was the only tuna brand sold in Thailand that listed the species of tuna (yellowfin) on the label of the package. While Greenpeace believes that this should be a bare minimum for all brands, it is worth acknowledging King's Kitchen for its follow-through. Notably, half of its yellowfin tuna (which is deemed "near threatened" by the IUCN Red List) is at least sourced via pole and line, an environmentally-conscious fishing method.

Strongest areas

Legality and sourcing policy. King's Kitchen claims that it does not source from vessels that are listed on official blacklists, does not engage in transshipment at sea, and does not source from companies who have been prosecuted for IUU fishing, but it was unable to provide any documentation to verify these claims. Its sourcing policy is not made available to the public, though the company claims to have language preventing the harvesting of certain species of tuna, protecting marine reserves, forbidding shark finning, and requiring a strong catch retention policy.

Needs improvement

First and foremost, King's Kitchen needs to be more transparent with the public. Its two areas where it needs the most improvement are in the areas of equity and driving change. Regarding equity, King's Kitchen did not have any information to provide on the treatment of the crew on vessels from which it purchases tuna, nor did it answer any of the questions on treatment of workers at the canneries, or percentage employment of locals vs. foreign ownership. The company also should take a much stronger leadership role in the sector, and become more highly involved in initiatives that support tuna conservation worldwide.

Bottom line

While King's Kitchen deserves credit for its on-package information, transparency is not an area of strength. The company should be more public with its sourcing policy, should be applauded for its sourcing of at least some pole-and-line product, and should consider sourcing less threatened species and increasing its percentage of pole-and-line purchases. It has large gaps in equity and has a high degree of risk in the area of potential mistreatment of labor. Given the rampant prevalence of abuses in the seafood industry as a whole, King's Kitchen should swiftly take action to make sure that it is not inadvertently contributing to the problem in its own supply chain.

No.3

Nautilus & Sea Crown



Background

Nautilus Food (Thailand) Ltd., an affiliate of Pataya Food Industries Ltd., was founded in 2005. Apart from the main operation in Thailand, Nautilus also has another marketing and distribution center located in Ho Chi Minh City, Vietnam. Nautilus Food (Thailand) Ltd. is the distributor of canned seafood under the brands “Nautilus”, “Nautilus Lite”, “Sea Crown,” “Lilly,” and “Mongkut Talay.”⁶ Nautilus varieties include tuna steak, tuna chunks and sandwich tuna.⁷ It is also the second largest canned tuna company in Thailand and provides product for some Thai supermarket brands of tuna.

Comments

Nautilus participated in this year’s survey, and informed Greenpeace that it primarily sources skipjack tuna, as well as some yellowfin and bigeye. Greenpeace strongly urges Nautilus to stop sourcing bigeye tuna immediately, and begin phasing out yellowfin. While it primarily catches skipjack tuna with purse seine vessels and sometimes opts for more sustainable FAD-free tuna, we encourage the company to more enthusiastically pursue sustainable fishing method alternatives.

Strongest areas

Nautilus did not have any particularly strong areas, but performed moderately well in the categories of general traceability, sustainability, and legality. It could improve its performance in traceability by finding a truly independent

third-party auditor, as the Thai government alone is insufficient. On sustainability, dropping bigeye (IUCN Redlist: “vulnerable”) and finding more sustainable fishing methods for skipjack would dramatically improve its performance. Finally, Greenpeace urges caution with Nautilus’s practice of transshipment. It provided evidence of an observer-cover transshipment of tuna at sea, but Greenpeace encourages to either make this policy of independent observer coverage public and applicable everywhere, or better yet, to ban transshipments at sea altogether as an even stronger way to guarantee legal product and protect laborers at sea.

Needs improvement

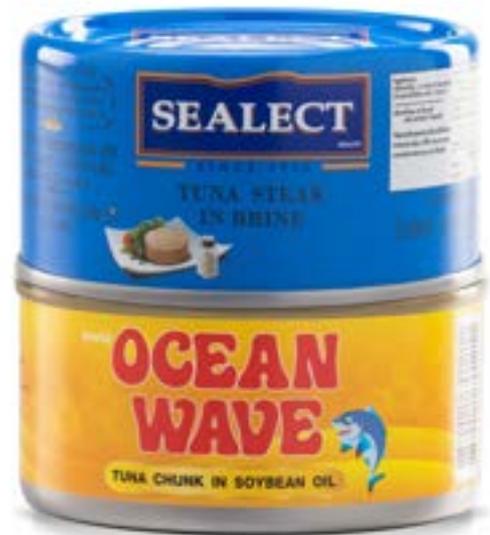
Equity and its sourcing policy are two areas that are found lacking with Nautilus. It should take human rights and labor issues more seriously, to avoid accidentally contributing to this rampant problem in the fishing industry. It has an internal policy which it shared with us, but Greenpeace encourages the company to strengthen its standards and go public with the policy.

Bottom line

Nautilus needs to implement many reforms to join the race towards greater sustainability, but the good news is that the company does have certain measures already in place. Given its size, it has the potential to make significant changes that benefit our oceans.

No.4

Sealect & Ocean Wave



Background

Thai Union Frozen Products PCL. (TUF) is the largest canned tuna company in the world. Sealect brand canned tuna controls 43% of the 700-million-baht domestic canned tuna segment, and seeks to increase the share to 50-60% in the near future. While it primarily exports its product, the company plans to spend 100-150 million baht in 2015 alone to encourage more Thais to consume canned tuna.⁸ TUF will introduce new products under the Sealect brand, with a goal to double the business of Sealect canned fish in three years. Over the next 5 years, Sealect products may also appear in new markets in Indonesia, Philippines, Malaysia and Singapore.⁹

Comments

TUF provided supplemental documentation and made several claims regarding the strength of its tuna policy, but we were unable to verify these claims as the policy is still internal and the company did not share this policy with us. Contrary to a previous practice of transshipment-at-sea, the company as a whole appears to have adopted a new policy to transship only at ports. While TUF engages in a variety of fishing methods, it struggles to segregate these products (which would then allow Sealect and other brands to exclusively sell a more eco-friendly product).

Strongest areas

Sealect should be commended for sourcing exclusively from skipjack tuna, a fish whose stocks are in the best shape when compared to other commonly-fished tuna species. Sealect and TUF also deserve credit for sourcing at least a small percentage of its product from pole-and-line fisheries.

However, approximately three-quarters of Sealect/Ocean Wave tuna is caught using an unsustainable method of capture known as purse seine FAD-fishing. As an active member of both the International Pole & Line Foundation and the International Seafood Sustainability Foundation, TUF should use this platform to push for more tuna conservation measures.

Needs improvement

Thai Union Frozen Products PCL, and by extension, Sealect and Ocean Wave, struggles more than any other company on the legality category. This is very troubling. Within the last two years, one of its fishing suppliers, Albacora S.A., was found to have engaged in illegal tuna fishing (a repeated occurrence for the company). TUF has also struggled with slave labor allegations in the shrimp sector, which raises similar questions with its level of oversight in the tuna sector. While TUF made statements on the survey, in the media, and in person that it no longer engages in at-sea transshipment, and that it only transships cargo at ports, there is a lot of work to be done here before the company can fully earn the public's trust on these issues.

Bottom line

Sealect is a dominant can of tuna in the Thai market. TUF intends to invest even more money to convince Thais to purchase more of its tuna. It is our sincere hope that TUF addresses its gaps now so that it can grow in an environmentally sustainable and equitable manner.

No.5

TESCO- LOTUS



Background

Tesco-Lotus is a joint venture between UK Tesco supermarket chain and the CP Group in Thailand. Charoen Phokpand (CP) is one of Thailand's biggest companies (owns all Thai-based 7-Elevens), and the owner is Thailand's richest man.¹⁰ Unfortunately, CP's supply chain has been associated with slave labor on board trawl fishing vessels. Tesco-Lotus has 1,800 stores in Thailand that service over 12 million customers each week.¹¹ Tesco-Lotus tuna brands are exclusively manufactured by Pataya for Tesco-Lotus, which in turn supplies from other companies that were disclosed to Greenpeace. Tuna brand varieties include tuna chunks and tuna flakes.¹²

Comments

Tesco-Lotus was an avid participant in the survey process, and Greenpeace applauds the company for the extent to which the company provided supplemental information and documents to better assess its performance. While the company barely passed, the future looks good since it has such a strong understanding of its internal supply chain. The company primarily sources skipjack tuna, but unfortunately also sources some yellowfin and bigeye, species listed as "near threatened" and "vulnerable," respectively, on IUCN's Redlist.

Strongest areas

Traceability and legality. Tesco-Lotus has a remarkably well-developed understanding of its supply chain, and performed better than any other brand in this category.

As stated earlier, true strength in this category is what allows for future, verifiable reforms in more sustainable sourcing. It also has rigorous standards in place to make sure that it is not inadvertently purchasing illegal product.

Needs improvement

Customer information and driving change. While the company has a good idea of what it is purchasing, unfortunately, this has not been well-communicated to customers. Similarly, while the company was highly transparent in this year's survey process, it needs to find ways to also be more transparent with its customers while still protecting its confidential business information. Tesco-Lotus needs to become far more involved in leading the way on sustainability, and driving change in the sector. In addition to promoting the protection of certain high seas fishing areas, it could also turn its attention inward to reform its supply chain by immediately dropping the purchase of bigeye tuna and switching to an increased percentage of pole-and-line caught skipjack.

Bottom line

If the company can (1) more sustainably source tuna for the Thai market, (2) more aggressively promote sustainable canned tuna in its stores, and (3) provide customers with more information on its new, more sustainable product, it should be well on its way to soaring to the top of the rankings.

No.6

ARO



Background

Aro is a store brand and is sold exclusively at Makro Cash and Carry Supermarkets. Siam Makro Public Company Limited primarily operates these membership based shopping clubs, registered under the name of “Makro”, throughout Thailand. At the end of 2013 there were 64 Makro stores and 5 Siam Frozen Food stores in operation across Thailand.¹³

Comments

Makro participated in this year's survey for their store brand, Aro. However, there were a number of information gaps that made assessing this company's performance difficult, especially since it did not respond to requests for clarification. It claims to have an internal policy but we did not receive a copy. The retailer did, however, send us some standards relied upon by one of their suppliers. The company blends skipjack, yellowfin, and tonggol in its cans of tuna. Given the problematic stock numbers for yellowfin and tonggol, it should only source skipjack. Given that Makro is a large-scale retailer, it has an excellent opportunity to source a low-cost, sustainably-caught product and could inform customers about it. Whether it will use this opportunity in the future remains to be seen.

Strongest areas

While Makro did not particularly stand out in any category, it scored relatively higher in traceability and legality, though with caveats. Its traceability score could have been higher

if it would have been able to identify and provide evidence of a third-party auditor and disclose its frequency of audits. For legality, the company had a number of standards in place to prevent or reduce IUU product from entering its supply chain, including a claim that it does not trans-ship product at sea. However, these claims could not be validated since we were not provided with the seafood policy or other documentation.

Needs improvement

The most confusing element of the survey involved wildly disparate answers provided in two separate areas regarding the percentage of product that is considered FAD-free. Absent any evidence, it is assumed that Makro sources some of its product from FAD-free fishing. One of its suppliers is known to provide that product. It also has poor marks in providing customer information and does not become engaged in driving the industry forward. Its scant customer information is particularly problematic given that it is a grocery retailer.

Bottom line

It would have been better to have received more complete information and supplementary evidence for this retailer. The retailer has many areas to improve, particularly publicly disclosing its sustainable tuna policy and enforcing that policy. If it addresses this and its problematic sourcing, Makro should be well on its way to a better score next year.

No.7



BROOK

Background

Brook tuna is manufactured by SEAPAC (Southeast Asian Packaging and Canning Co., Ltd.). SEAPAC was the first tuna canning factory in Thailand, formerly called SAFCOL (THAILAND), LTD. It has two main factories and produces a wide range of tuna products for the retail and foodservice markets around the world.¹⁴

Comments

Brook participated in the survey process, though was unavailable to answer follow-up, clarification questions. Nonetheless, Greenpeace was able to get a good pulse on the status of this company. Brook relies on a variety of fishing methods, anywhere from pole-and-line caught skipjack (good) to purse seine caught yellowfin (bad). It did not identify its third-party auditor, lending doubt to the frequency of its supply chain audits. The fact that Brook has some sustainable sourcing at all allowed it to squeak by with a “fair” ranking and narrowly avoid a failing score.

Strongest areas

Sustainability and legality. The pole-and-line fishing method along with a little bit of FAD-free fishing gave this company respectable marks in the sustainability category (though sourcing yellowfin and tonggol are problematic due to their lower stock levels). Likewise, the company appears to take measures to avoid sourcing IUU products, though it is unclear exactly how it does so. Brook claims to not transship-at-sea.

Needs improvement

The company did not even mention whether it has an internal sourcing policy. Given the lack of any external information, it is safe to assume that it does not have one, and should create one immediately. The company could use this opportunity to endorse its good sourcing (instead of it being merely a fluke), get rid of the unsustainable sourcing, and create standards for a number of related tuna fishing issues, ranging from the banning of shark finning to the protection of marine reserves. Of course, like the other brands profiled in this report, it has a lot of work to do on providing more customer information and taking the initiative to lead change in the sector.

Bottom line

If Brook is able to better communicate to customers on its sourcing and traceability, be more transparent about its third-party audit process, and craft a sustainable seafood policy that increases the proportion of sustainable seafood that it currently sources, the company should be well on its way to challenge other front-runners in this report.

No.8

TOPS



Background

Central Food Retail Company Limited (CFR) is the largest supermarket chain in Thailand, operating since 1996. Central Food Retail has continually repositioned each store format to represent the various customer demographics, one of the brands being Tops.¹⁵ Tops canned tuna is manufactured by Thai Union exclusively for Central Food Retail Co., Ltd. Home brands include Tops tuna steak¹⁶ and Tops sandwich tuna.¹⁷

Comments

Tops Supermarket readily participated in this year's first survey. Tops received a failing score for a number of reasons, but if there is a silver lining, it is this: the supermarket appears to have a confident handle on its supply chain and traceability. Without that, no reforms could truly be made. With it, and reforms are now within reach. Tops sources FAD-caught tonggol tuna from Thai Union Foods. Greenpeace encourages the company to source a different species of tuna with more sustainable stock levels (such as skipjack), and to avoid purchasing tuna caught with FADs. As a supermarket retailer, it has an additional opportunity to promote sustainable tuna brands to its customers.

Strongest areas

General traceability and legality. Tops can trace where its tuna comes from, and relies on both internal and external, third party audits to verify its sourcing. It also takes measures to avoid sourcing IUU product, though Greenpeace encourages Tops to review its policy on at-sea transshipment, which is a practice that is often susceptible to the laundering and

commingling of illegal product, and creates conditions where human rights abuses can easily occur. While Tops indicated that it does not purchase from vessels that engage in this practice, Greenpeace encourages the company to verify that this is indeed the case.

Needs improvement

Its seafood sustainability and sourcing policy are areas that are in dire need of improvement. Tops should address the issues of low stock status and wasteful fishing method in one fell swoop, by both choosing to sell a different tuna species that has a greater population and by fishing for this tuna in a more environmentally protective manner, for example, relying on pole-and-line or FAD-free. Tops Supermarket's sourcing policy is internal and practically devoid of any commitments or standards. It should spend the rest of 2015 developing a robust, publicly-available sourcing policy that has protective measures in place that address traceability, sustainability, and equity.

Bottom line

Tops has the fundamentals of traceability down, but needs to be more vigilant and exercise independent judgment when making tuna purchasing decisions for its stores. Simply sourcing product from a well-known company is insufficient alone to ensure that the oceans are being protected. It should use its purchasing power as a nationwide supermarket chain to source more sustainable tuna, and then inform its customers on why its new product is more sustainable than that of its competitors.

No.9

AYAM



Background

The Ayam Brand is sold in Thailand, Malaysia, Singapore, Hong Kong, China, Japan and Australia.¹⁸ Its canned tuna varieties includes tuna chunks and tuna sandwich.¹⁹ Ayam Brand is produced by Thai Union Foods.

Comments

Ayam did not participate in this year's survey, so Greenpeace was unable to make a full, more thorough assessment of its operations. However, Ayam did have more publicly-available information on its website that allowed us to give the company some credit. Ayam sources only skipjack, tonggol, and bonito species of tuna, which are not considered endangered.²⁰ Unfortunately, the company does not provide any additional information on where these tuna are caught and what fishing methods are used.

Strongest areas

Ayam did not perform well in any category of the survey. However, to its credit, it was the only brand to provide information on tuna species on its website (King's Kitchen did so on the packaging itself). Also, it is sourcing tuna species that appear to have safe stock levels.

Needs improvement

Traceability and Equity, though all areas need improvement. While Ayam sources from stocks that are not endangered, Ayam needs to provide more information on fishing method and to demonstrate that its product is traceable from ship to shelf. It has also failed to demonstrate how, if at all, it ensures that it sources product that has not been associated with mistreatment of workers or crew.

Bottom line

While it is refreshing that the company provided some information online regarding which tuna species it sells, it has a lot of work ahead on the issues of traceability, sustainability, and equity. It is our hope that Ayam more fully participates in the information sharing process next year, and climbs out of the category of failed brands.

No.10



BIG C

Background

Big C is a grocery and general merchandising retailer headquartered in Bangkok. It is the leading hypermarket chain in Thailand, managed under the umbrella of Groupe Casino. In 2010, it acquired rival supermarket chain Carrefour in Thailand. ²¹

Comments

Big C did not participate in this year's survey, so Greenpeace was unable to run a full assessment. Unfortunately, there is an absence of publicly-available information on its tuna sourcing online. The can of tuna itself had enough information to glean that Thai Union Foods (TUF) is an underlying supplier of the tuna, however it is unknown whether they are the only supplier. Even if TUF is the sole supplier, it is unclear what of the multitude of tuna products TUF sources is actually packed in the can. Big C must develop a sustainable seafood policy, communicate this to the public, and verify that its internal processes are well-run, and in compliance with its policy via independent, third-party audits. The public deserves to know more about where their tuna is from. Big C must develop a sustainable seafood policy and communicate this to the public. Aside from this, they should verify that its internal processes are well run and in compliance with its policy via independent third party audits.

No.11

Home Fresh Mart



Background

Home Fresh Mart and Gourmet Market are the grocery stores owned by the Mall Group (Central Group's main competitor) and which are located within the Siam Paragon and Emporium shopping centres. These supermarkets compete directly with Tops and Villa, and are aimed at upper class Thais and expats. ²²

Comments

It did not participate in this year's survey and did not return any follow-up calls, so Greenpeace was unable to run a full assessment. Unfortunately, there is an absence of publicly-available information on its tuna sourcing online. The can of tuna itself had enough information to glean that Thai Union Foods (TUF) is an underlying supplier of the tuna, however it is unknown whether they are the only supplier. Even if TUF is the sole supplier, it is unclear what of the multitude of tuna products TUF sources is actually packed in the can. Home Fresh Mart must develop a sustainable seafood policy and communicate this to the public. Aside from this, they should verify that its internal processes are well run and in compliance with its policy via independent third party audits. The public deserves to know more about where their tuna is from. Given that it is a supermarket store brand, Gourmet Market (and The Mall Group's other affiliates) could choose to use its Home Fresh mart brand to engage in the tuna sustainability arena and highlight its upcoming reforms to its customers.

No.12



Roza

Background

Roza Brand is manufactured by Hi-Q Food Products Company Limited. Hi-Q's first production facility is located in Bangbor, Samutprakarn province. In 1996, Hi-Q acquired the legal rights to "Roza", a popular brand in the cooking sauce industry. "Roza" gave the company a foothold in the Thai cooking sauce market and it operates in both that market and the canned fish market.²³

Comments

Roza did not participate in this year's survey, and there was virtually no information available online that would give consumers even a remote idea of what kind of fish is in the cans, where it comes from, and whether it was sustainably caught. It must develop a sustainable seafood policy, communicate this to the public, and verify that its internal processes are well-run, and in compliance with its policy via independent, third-party audits. The public deserves to know more about where their tuna comes from. Greenpeace cannot confidently evaluate this brand given the complete lack of information publicly available.

05

A Final Note

on Labor and Human Rights Issues in the Tuna Industry

Recent, numerous reports have implicated Thailand in problems associated with illegal fish and human rights abuses in the seafood supply chain.

These revelations influenced the United States to designate Thailand as a Tier 3 country, and the EU to give a yellow card warning to Thailand for not taking sufficient measures in the international fight against illegal fishing (IUU). Both of these actions threaten trade relations with Thailand, in both seafood and in other sectors. It is therefore important that market players and the seafood/tuna industry strengthen both labor standards and traceability by developing publicly-available sourcing policies and in turn implementing them.

At minimum, the tuna should be:

- Only sourced from sustainable and socially responsible fisheries.
- Fully traceable from ship to shelf, including feeds used for bait. Regular audits of the entire supply chain, including unannounced visits, should be an integral part of this policy;
- Not sourced from any vessels or companies that have been blacklisted for engaging in IUU fishing. Greenpeace maintains such a blacklist and recommends that market players consult this tool

before they agree to source from an operator;

- Not sourced from vessels that transship (transfer their catches) at sea;
- Not sourced from any company that has been sanctioned for illegal activities related to the capture and trade of fish;
- Not sourced from any company associated with labor abuse, human rights abuses or human trafficking.
- Only sourced from vessels, companies, canneries and processors that operate in full compliance with international labor standards, as reflected in, among others, the International Labor Organization (ILO) Core Conventions, the ILO Work in Fishing Convention 2007 (No. 188) and the ILO Maritime Labor Convention.

Finally, the best way for companies to guarantee that these measures are being fully implemented is by mandating independent, third-party audits to identify any gaps.

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