



# Sea of Distress

2017



# GREENPEACE

Greenpeace is an independent campaigning organization that uses peaceful protest and creative communication to expose global environmental problems and to promote solutions that are essential to a green and peaceful future.

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# Foodservice Sustainable Seafood Scorecard



#	Score	Company
#1	<b>61.7</b>	Sodexo USA
	41.8	
#2	<b>57.6</b>	Aramark
	40.1	
#3	<b>51.7</b>	Compass Group USA
	40.3	
#4	<b>31.5</b>	Performance Food Group
	7.5	
#5	<b>27.2</b>	Sysco
	14.1	
#6	<b>24.1</b>	Centerplate
	11.6	
#7	<b>13.8</b>	Delaware North
	8.8	
#8	<b>12.8</b>	AVI Foodsystems
	5.5	
#9	<b>12.6</b>	Reinhart Foodservice
	5	
#10	<b>10.2</b>	Food Services of America
	8	
#11	<b>10</b>	Gordon Food Service
	9	
#11	<b>10</b>	US Foods
	9.3	
#13	<b>8.5</b>	Maines Paper & Food Service
	6.3	
#14	<b>8</b>	Shamrock Foods
	7	
#15	<b>7.3</b>	Elior North America
	5	

# Introduction

This is the second edition of Greenpeace's *Sea of Distress* report. While we have seen progress from last year's baseline assessment of responsible seafood sourcing in the U.S. institutional foodservice industry, industry-wide efforts are failing to ensure healthy oceans. This edition provides new information for foodservice companies on the impact of Thai Union's recent commitments,<sup>1</sup> and ways that companies can reduce their footprint and save money by phasing out single-use plastic (much of which ends up in our oceans). This report also discusses some of the most serious and unresolved issues in both institutional foodservice and the seafood industry: poor traceability and problematic transshipment at sea.

Our oceans are vital to one million species, generate half of the oxygen we breathe, and provide food for billions of people. Sadly, the global seafood industry has relentlessly exploited the world's oceans. One-third of global fish stocks are overfished, and despite efforts to find and catch more fish (along with improvements to fisheries management in some regions), new research indicates that global fish catches have been declining since the 1990s.<sup>2</sup> With production expected to increase by nearly 20% by 2025, ocean ecosystems are being decimated.<sup>3</sup> In recent years, several investigations have revealed an out-of-control seafood industry that exploits workers and our oceans for short-term profits. The U.S. State Department has reported forced labor and human trafficking on fishing vessels or in processing facilities in more than 50 countries.<sup>4</sup>

The U.S. foodservice industry represents approximately half of the food-away-from-home spending every day nationwide.<sup>5</sup> Tens of thousands of companies work to provide food across many segments, from restaurant chains to corporate campuses, hospitals, sports stadiums, K-12 school systems, and universities. With annual sales exceeding \$700 billion and significant growth expected to continue, this industry has a tremendous impact on the environment and workers worldwide. Without consumer brand recognition, some

companies regularly procure enormous volumes of at-risk species in relative obscurity. Poor labor track records in the U.S.<sup>6, 7</sup> and throughout global seafood supply chains, warrant a continued focus on the U.S. foodservice industry's seafood operations.

The year 2017 has brought forth encouraging developments with the United Nations' efforts to protect ocean biodiversity,<sup>8</sup> and tuna giant Thai Union's commitments to improve its operations. Unfortunately, much of the seafood industry continues to rely on exploitative and unsustainable models, putting society on a collision course with nature's ability to restore degraded ecosystems. While forward-thinking businesses are implementing policies and advocating for improvements in fisheries management, most of the industry is satisfied with the destructive status quo, and continues to rely exclusively on either poor internal standards or flawed eco-certifications (e.g., Marine Stewardship Council [MSC], Best Aquaculture Practices [BAP], Aquaculture Stewardship Council [ASC]).<sup>9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20</sup>

Large seafood buyers must use their market and political influence to transform supply chains and ensure safeguards for the oceans and workers. Greenpeace urges the U.S. foodservice industry to markedly increase transparency, hold suppliers accountable, and advocate for better regulation of fisheries and stronger labor standards to protect workers' rights. All foodservice companies must provide workers with living wages, fair and safe working conditions, and the ability to freely join representative organizations and bargain collectively, and must uphold strong labor and human rights standards.<sup>i</sup> Having a robust seafood policy, establishing and implementing effective audit procedures to ensure compliance, and communicating standards with buyers and suppliers are essential for meaningful reform. Finally, given the rapidly increasing impacts of plastic pollution, the foodservice industry must take decisive action to reduce its plastic footprint.

<sup>i</sup> ILO Core Conventions are eight conventions that the International Labour Organization deems as fundamental principles and rights at work. Foodservice companies should source only from vessels, companies, canneries, and processors that operate in full compliance with international labor standards, including ILO Core Conventions, the ILO Maritime Labour Convention, and the ILO Work in Fishing Convention.

# The Most Significant Trends and Findings from This Report

- **Sodexo** (ranked 1st), **Aramark** (2nd), and **Compass Group** (3rd)<sup>ii</sup> continue to lead the industry on sustainable seafood, transparency, and advocacy, and were the only companies to receive passing scores. There remains at least a 20-point difference in scores between these top-three ranked companies and the remaining 12 companies that failed this report.
- **Aramark** excelled (98.2 points) in the advocacy category, released a public policy that addresses transshipment at sea, and continues to implement its shelf-stable tuna commitments.
- The three most improved companies were **Performance Food Group** (24-point increase), **Sodexo** (19.9-point increase), and **Aramark** (17.5-point increase).
- While contract management companies **Centerplate** (ranked 6th), **Delaware North** (7th), and **AVI Foodsystems** (8th) improved, they still failed this assessment and require ample work to match top-ranked **Sodexo**, **Aramark**, and **Compass Group**.
- All eight broadline distributors failed this assessment: Performance Food Group, Sysco, Reinhart Foodservice, Food Services of America, Gordon Food Service, US Foods, Maines Paper & Food Service, and Shamrock Foods.
- Among broadline distributors, **Performance Food Group** (PFG; ranked 4th) made noteworthy improvements. While it still failed, it is now the top-ranked broadline distributor in this assessment. **PFG** surpassed **Sysco** (5th) and **US Foods** (11th)—two massive companies still lagging behind on responsible seafood.
- **Sodexo** is the only one of the three largest U.S. contract management companies without a public commitment to source only responsibly caught shelf-stable tuna. **Compass Group** and **Aramark** have already committed to source more responsible tuna (e.g., fish aggregating device [FAD]-free skipjack, pole and line albacore).
- **Maines Paper & Food Service** (ranked 13th), **Shamrock Foods** (14th), and **Elior North America** (15th) were the worst performers. Incredibly, **Reinhart Food Service** (9th) sources bluefin tuna, a severely overfished red list species.

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## All eight broadline distributors failed this assessment:

**Performance Food Group, Sysco, Reinhart Foodservice, Food Services of America, Gordon Food Service, US Foods, Maines Paper & Food Service, and Shamrock Foods.**

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## Several Problems Remain in the U.S. Foodservice Industry

**Broadline distributors are failing on responsible seafood.** As suppliers for many sectors from restaurants to retail, travel and leisure, business and industry (B&I), education, healthcare, and the military, broadline distributors play a critical role in the seafood supply chain. Corporate and institutional clients should worry about potential risks to their brands and profits created by a lack of transparency and traceability,

and the failure of broadline distributors to provide sustainable, ethical seafood. Every profiled broadline distributor failed Greenpeace's assessment.

Given the dependence of contract management companies and other operators on broadline distributors, it is difficult for smaller operators that want responsible seafood to have significant buying

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<sup>ii</sup> Unless otherwise stated, Compass Group and Sodexo refer to Compass Group USA and Sodexo USA, respectively.

leverage with large distributors. While group purchasing organizations (GPOs) and other cooperatives increase buying power, problems remain with flawed systems like rebates that incentivize consumption without regard for environmental or social impacts.

As the two largest broadline distributors nationwide, Sysco and US Foods have significant and increasingly more control<sup>21</sup> over what seafood products are available for management companies, restaurants, hotels, schools, and other clients, and can influence suppliers. Sysco is so large that its seafood sales alone (more than \$2.5 billion in 2016)<sup>22</sup> are greater than the entire annual revenue of some management companies profiled in this report.

Larger companies have more resources to invest in improving the sustainability and social equity of their supply chains, and to identify alternative suppliers. They also have the responsibility to use their leverage to address any human rights violations that may be linked to their operations or products.<sup>23</sup> Despite their promises on paper to not do business with suppliers violating the law or harming workers, large distributors have purchased from businesses that have been connected to destructive fishing practices and forced labor.<sup>24, 25, 26</sup> Clients of Sysco and US Foods, and other large distributors (e.g., PFG, Gordon Food Service, Reinhart Foodservice) should demand that these companies clean up their supply chains immediately.

**The foodservice industry is failing to deliver to millennials.** Consumers, including millennials and students, increasingly want sustainable products.<sup>27, 28, 29, 30, 31</sup> According to one study, 43% of millennials do not trust large food manufacturers,<sup>32</sup> and in another study nearly half of millennials value factors like social impact and transparency over traditional value drivers like price.<sup>33</sup>

Consumers are concerned about workers' rights, and are willing to pay more for responsible products.<sup>34, 35</sup> A recent industry survey by Cargill found that 88% of Americans (and 93% of millennials) are willing to pay more for sustainably and responsibly sourced seafood.<sup>36</sup> Broadline distributors and foodservice management companies can seize this opportunity or be left behind for failing to evolve with consumer trends. This is especially relevant since higher education operations, a key segment for foodservice, can be disrupted by millennials,<sup>37</sup> and questionable or unethical operations in the foodservice industry may now be less likely to go unchecked by them.<sup>38, 39, 40, 41, 42, 43</sup>

**Poor traceability is associated with off-contract seafood.** The nuance between on-contract and off-contract purchases is a major loophole in institutional foodservice. While contract management companies may have a seafood policy to guide purchasing, operators may receive special requests for a product not in the catalog or decide to purchase something that is not approved (i.e., off-contract). Even though off-contract purchases are strongly discouraged by companies and sometimes can even be helpful (e.g., if an operator purchases a more responsibly sourced product), the lack of traceability with off-contract purchases is alarming.

Without compliance or the ability to fully track off-contract purchases, a company's strong procurement standards can be compromised. Major seafood commitments to date in the foodservice industry apply only to contracted purchases or private label products. This means that companies may tout seafood sustainability without actually ensuring all seafood purchases are responsible.

## Time for Action

After nearly one decade of Greenpeace's collaborative engagement with U.S. grocery retailers, and following Thai Union's recent commitments,<sup>44</sup> it is time for the foodservice industry to refocus its priorities amid declining fish stocks and rampant human rights abuses in the global seafood industry. There is still hope for the oceans if companies are willing to take a long-term outlook on seafood sourcing instead of procuring wild-caught fish from stocks on the verge of collapse or from aquaculture operations with little regard for social or environmental impacts.



# Companies Evaluated and Methodology

This report evaluates the seafood sustainability of 15 large foodservice companies: eight broadline distributors (e.g., Sysco, US Foods, Performance Food Group) and seven contract management companies (many are supplied by these large distributors, including Compass Group, Aramark, and Sodexo). While several profiled companies have international operations, this report evaluates U.S. operations only. However, Greenpeace expects international foodservice companies to have global initiatives and develop consistent standards for every country where they operate.

Broadline Distributors	Management Companies	
   	    <td>      </td>	      

While there are many additional contract management companies, smaller distributors, and other segments of the massive foodservice industry, this report evaluates major players with significant buying power and presence in institutional foodservice. Each company received an identical survey reflective of five scoring criteria, and had advance notice of the survey, context about this assessment, and more than six weeks to complete the survey. Compass Group, Aramark, and Sodexo fully completed the survey process. Six companies did not complete the survey, but provided additional information, and six companies never responded to Greenpeace.

Greenpeace also used publicly available information (e.g., annual reports, websites, industry press, seafood catalogs) to evaluate companies. While some profiled companies may have internal sustainable seafood initiatives, Greenpeace is unable to assess initiatives for which it has no data. Despite differences in business operations, all 15 companies are large buyers of seafood in the foodservice industry, and therefore are ranked against each other.

Surveys were scored independently and consistently. After extensive review of independent findings among the scoring team, companies received a score for each criterion and an overall score (weighted average of all five criteria). Each company profile includes its overall score and score for each of the five criteria on a 100-point scale, where below 40 is a failing score, 40 to 70 is a passing score, and above 70 is a leading score. Each company is encouraged to meet with Greenpeace to discuss its results and Greenpeace's recommendations.

**Below 40 is a failing score,  
40 to 70 is a passing score,  
above 70 is a leading score.**



# Scoring Criteria for Evaluating Seafood Sustainability

## 1. Sustainable Seafood Policy (23 points)

The policy score evaluates systems used to govern a company's purchasing decisions and avoid supporting destructive or unethical practices. To lead in this category, a company would need to establish and enforce rigorous standards to responsibly source wild-caught and farm-raised seafood across its fresh, frozen, and shelf-stable categories.

## 2. Legal and Socially Responsible Sourcing (23 points)

This score evaluates a company's supplier requirements (e.g., delivers seafood according to its policy; refuses to buy tuna transshipped at sea; takes measures to prevent illegal, unreported, and unregulated [IUU] fishing). It also evaluates efforts to ensure fair, safe, and equitable working conditions for foodservice employees and seafood workers throughout a company's supply chains (e.g., prevent forced labor, pay living wages, respect international labor standards).

## 3. Current Issues and Advocacy (14 points)

The current issues and advocacy score evaluates a company's efforts to improve fisheries management through policy and market interventions (e.g., advocate for reforms with regional fisheries management organizations [RFMOs]; require suppliers to source only sustainable, ethical shelf-stable tuna; engage suppliers to improve their operations; work with groups to publicly promote sustainable seafood and protect workers' rights).

## 4. Traceability and Transparency (20 points)

The traceability and transparency score evaluates detailed seafood specifications a company collects and makes available for clients and consumers (e.g., vessel- or farm-to-shelf traceability, UN Food and Agriculture Organization catch area).<sup>43</sup> This score also assesses whether a company conducts internal and external third-party audits of its supply chain (covering traceability, sustainability, social equity, and health and safety of workers).

## 5. Inventory (20 points)

This score evaluates each company's seafood inventory across nearly 30 species in key foodservice categories (e.g., shrimp, salmon, tuna, whitefish, crab). Each company's inventory was benchmarked against the Monterey Bay Aquarium Seafood Watch recommendations.<sup>45</sup>

<sup>43</sup> Among other fisheries-related initiatives, FAO has categorized the oceans' "major fishing areas" by a numeric code, which helps indicate the region where a particular species was caught.

# Tackling Traceability

As fish stocks decline from overfishing, industrial fleets expand, and demand increases for cheap seafood, some companies are motivated to employ cheap or forced labor, and to fish illegally.<sup>46, 47</sup> Some 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....”<sup>48</sup> The U.S. State Department has reported forced labor and human trafficking on fishing vessels or in processing facilities in more than 50 countries.<sup>49</sup>

Greenpeace has documented deplorable working conditions on tuna vessels (e.g., working up to 22 hours a day, wage theft, debt bondage, physical abuse, and violence).<sup>50, 51</sup> The tuna industry relies on transshipment at sea, where smaller boats refuel, restock, and transfer catch onto larger cargo vessels. Many trafficked and abused workers have their documentation confiscated and are forced to remain at sea with little means of escape; some escaped men have reported being kept at sea for years.<sup>52, 53, 54</sup> This practice turns fishing boats into floating prisons and enables vessels to hide illegally caught fish and mistreat crew members.

In addition to horrors inflicted directly on people, coastal communities are deprived of their access to fish when much of it is outright stolen from their waters. A 2014 study found that 20–32% (\$1.3–2.1 billion worth) of wild-caught seafood imported into the U.S. is illegal.<sup>55</sup> Incredibly, in light of both human rights abuse and illegality, the lobby group National Fisheries Institute (NFI) has resisted efforts to improve seafood traceability.<sup>56, 57</sup> Fortunately, NFI failed in its recent attempt to challenge a new U.S. seafood traceability rule<sup>58</sup> called the Seafood Import Monitoring Program, which will take effect in January 2018.<sup>iv</sup> Foodservice companies should partner with reputable organizations that strive to improve traceability measures and/or labor and human rights,<sup>v</sup> instead of those that fight them.

Traceability is the guarantee that both foodservice companies and their clients need before any sustainability claims can truly be accepted and verified, and in many ways it is the glue that holds the responsibly sourced products’ supply chains together. As traceability continues to be in the global spotlight, the foodservice industry must act to assure consumers and governments that its entire supply chains are free of products that violate any labor, human rights, trade, or environmental laws. Companies must go beyond policy statements and take action; tough-sounding policies are meaningless if suppliers do not comply and companies do not enforce compliance.

Foodservice companies need systems to quickly provide clients key data elements, such as harvest method, fishery or farm, species name, and vessel name (for wild-caught seafood). It is inadequate to consider a supplier signature alone as evidence that the supplier will uphold a seafood buyer’s sustainability or labor standards. Third-party audits must go beyond food safety to cover sustainability, social responsibility, and worker health and safety, and these should be paired with effective grievance and remedy mechanisms. Furthermore, foodservice companies must publicly share audit results.



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<sup>iv</sup> SIMP would require importers to accurately report the type of fish being shipped and how and where it was caught or farmed for the following species of seafood: tuna, king crab, blue crab, red snapper, Pacific and Atlantic cod, dolphinfish, grouper, sea cucumber, swordfish, and sharks.

<sup>v</sup> Greenpeace recommends the following labor and human rights organizations: Environmental Justice Foundation; Human Rights Watch; International Labor Rights Forum; International Transport Workers Federation; International Brotherhood of Teamsters; International Union of Food Workers (IUF); United Food and Commercial Workers (UFCW); Union of Needletrades, Industrial, and Textile Employees and Hotel Employees and Restaurant Employees Union (UNITE HERE); Service Employees International Union (SEIU); and the Solidarity Center.

# Recommended Traceability and Transparency Measures

## 1. Require full transparency and traceability from catch to consumption—electronic is best.

Suppliers should provide electronic logbooks<sup>vi</sup> to national authorities and should be able to provide seafood buyers with either digital or paper copies of catch documentation. Suppliers must also be willing to undergo regular inspections by a reputable third-party auditor to ensure compliance.

Technological approaches are swiftly improving and becoming the norm.

- Blockchain is a digital ledger that can be accessed by everyone and is expected to revolutionize several industries, including the food industry.<sup>59</sup> It is already being piloted as a tool to help fight human rights abuses and illegal fishing.<sup>60</sup>
- Thai Union is moving toward full electronic catch data and traceability (eCDT) across its global supply chain.<sup>61</sup> It is currently running pilot programs to test eCDT systems that rely on mobile applications and satellite connectivity to promote workers' rights at sea and demonstrate fair labor compliance in Thai fisheries.<sup>62</sup>
- Global Fishing Watch,<sup>63</sup> an organization founded with support from Google, Oceana, and SkyTruth, tracks fishing vessels and allows anyone to view the tracks of vessels employing an automatic identification system. The platform is steadily expanding: Indonesia recently partnered with Global Fishing Watch and became the first nation to share proprietary vessel monitoring system (VMS)<sup>vii</sup> data with the organization.<sup>64</sup>

More widespread use of these technologies will make it easier to identify illegal fishing and keep dishonest suppliers out of foodservice seafood supply chains.

## 2. Commit to a moratorium on transshipment at sea.

Transshipment at sea is a common practice in the fishing industry, where vessels transfer their seafood to a reefer (refrigerated cargo) ship, and are resupplied with fuel and goods to continue fishing at sea. However,

in the tuna industry, there is substantial documentation of companies laundering illegally caught fish and exploiting workers through this practice, particularly in the longline sector.<sup>65, 66, 67</sup> Tuna can be commingled from several different sources with relative ease, obfuscating the supply chain, erasing detection of tuna caught illegally or unethically, and allowing vessels, along with their crew, to avoid returning to port for excessive periods of time.<sup>68, 69</sup> Greenpeace is calling for a moratorium on transshipment at sea in the tuna industry until these serious concerns can be adequately addressed. The safest alternative to this practice is to conduct transshipment at port, where observers can oversee the process and workers can seek help and refuge if needed.

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## Greenpeace is calling for a moratorium on transshipment at sea in the tuna industry.

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## 3. Require observer coverage.

Whether fishing at sea or unloading or transshipping in port, independent third-party human observers or electronic video monitoring can help prevent illegal practices. Thai Union has committed to 100% observer coverage on longline vessels by 2020.<sup>70</sup> Likewise, foodservice companies must require suppliers to have on-board observers or video monitoring, particularly in the tuna sector. Also, companies must ensure that observers are unharmed. Unfortunately, there are many documented cases of observers being harassed, assaulted,<sup>71</sup> or even killed.<sup>72</sup> The Association for Professional Observers is a good resource for guidance on which suppliers to avoid.

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<sup>vi</sup> E-logbooks: an electronic recording and reporting system where all fisheries data are conveyed from the vessel to national authorities.

<sup>vii</sup> VMS is a satellite surveillance system primarily used to monitor the location and movement of commercial fishing vessels. The system uses satellite-based communications from on-board transceiver units, which certain vessels are required to carry. The transceiver units send position reports that include vessel identification, time, date, and location, and are mapped and displayed on the end user's computer screen.

# Foodservice: Drowning in Plastic

Our world is choking on plastic. It blights communities, causes urban flooding, and provides a breeding ground for diseases. Plastic is even in our drinking water. A recent study found microscopic plastic fibers in 83% of drinking water samples in countries worldwide. The highest contamination rate of microplastic fibers (94%) was found at sites in the U.S. (e.g., Congress buildings, Environmental Protection Agency [EPA] headquarters).<sup>73</sup>

The flow of plastic into our environment has reached crisis proportions, and the evidence is most clearly on display in our oceans. The equivalent of one garbage truck of plastic enters our oceans every minute, every day, all year long.<sup>74</sup> If current trends continue, estimates suggest that by 2050 there will be more plastic in the ocean than fish.<sup>75</sup> Diverse marine life is ingesting plastic and associated toxins, and recent science shows alarming negative health impacts in species that people commonly eat.<sup>76</sup> The UN describes this as a potential “toxic time-bomb.”<sup>77</sup> Without immediate solutions and action, the increasing volume of plastic in our oceans will have severe consequences for biodiversity and food safety.

Single-use plastic is a huge piece of the problem. Items such as Styrofoam, cutlery, straws, cups, to-go containers, wrappers, and plastic bags are used once and then thrown away. Plastic lasts for centuries, and yet companies choose it again and again for single-use applications.

While recycling efforts occur worldwide, plastic recycling is largely ineffective—only 14% of plastic packaging is collected for recycling globally.<sup>78</sup> Recycling efforts focus primarily on high-value plastic. Packaging trends, however, are moving toward more single-use, on-the-go packaging that is increasingly nonrecyclable. Plastic packaging is constantly changing, and recyclability does not drive product design. While recycling is well established in the U.S., most plastic waste is discarded. According to EPA, in 2014 more than 33 million tons of plastic waste was generated in the U.S. alone, and only 9.5% was recycled.<sup>79</sup> While an important piece of the solution to the plastic crisis, it is clear that recycling alone cannot keep plastic out of our environment or our food.

## Time for Action

As companies that sell and use a significant amount of single-use plastic packaging, foodservice providers have a fundamental role to phase out all single-use plastic; transform delivery systems; create packaging policies that comply with strong environmental and social criteria; and actively work to promote, advertise, and ensure implementation of plastic alternatives.

Greenpeace is launching a major global campaign to eliminate single-use plastic—with particular emphasis on food and beverages—and working with hundreds of nongovernmental organizations (NGOs) in the Break Free From Plastic movement to stop plastic pollution.<sup>80</sup> As an increasing number of organizations call for change, the time to act is now.



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### Eliminating single-use plastic not only helps reduce the amount of trash in landfills and the oceans, it can also save companies money.

From February 2016 to May 2017, Genentech piloted Clean Water Action's *ReThink Disposable* program<sup>81</sup> in one of the pharmaceutical giant's nine cafes at its South San Francisco campus.<sup>82</sup> The company reduced more than one million pieces of disposable foodservice packaging items, representing 44 different types of packaging. After accounting for associated costs, the cafe projects annual savings of more than \$12,000—not including the additional savings from reduced hauling services. Compass Group subsidiary Bon Appétit Management Company supplies Genentech, and plans to apply the Best Management Practices (BMPs) from this pilot program to all of Genentech's cafes.

The University of San Francisco's hub of campus dining, Market Café, piloted *Rethink Disposable*'s BMPs for source reduction.<sup>83</sup> Market Café reduced more than 2.6 million pieces of disposable foodservice packaging items, representing 10 different types of packaging. After folding in the one-time setup cost of \$5,241 and the annual ongoing cost of \$27,297 to sustain the new cafe durables operation, the cafe would see an annual savings of more than \$157,000 from avoided foodware costs and the revenue generated from implementing a \$0.25 charge on disposable containers to incentivize students to dine in on reusable foodware.

### Foodservice companies can reduce their plastic footprint by implementing these *ReThink Disposable* program BMPs:

1. Encourage customers to dine in and offer only reusable foodware for employees or students dining in at institutional cafes and cafeterias. Because packaging practices are ingrained in our culture, if disposable options still exist, patrons will continue to use disposable packaging, even to dine in. Develop a robust communications strategy and incentivize diners to use durables by charging for disposables.
2. Implement a reusable container exchange program for to-go orders to supplement initiatives to eliminate disposable packaging for dine-in customers.
3. Eliminate unnecessary disposable packaging like straws, and replace individually wrapped condiment and sweetener packages with bulk dispensers.
4. Ban the offer or sale of water bottles. Create water refill stations and encourage customers to bring a refillable water bottle to avoid plastic water cup usage.
5. Stock staff break rooms with reusable cups and mugs, bulk creamer and sweetener, and replace disposable stir sticks with reusable spoons.

# Everyone Must Take Action

As fish stocks collapse, demand increases, and workers continue to be at risk of labor and human rights abuses, foodservice companies profiting from seafood sales must act. Companies have the power to bring about enormous positive change for our oceans and seafood workers. They can help rebuild depleted stocks, create protective measures for vulnerable habitats, promote strong fishery management across the globe, tackle ocean pollution, and ensure that workers throughout the supply chain are guaranteed fair wages, ethical treatment, and safe working conditions. Here are five steps that foodservice companies, large clients, and consumers can take for more responsibly sourced seafood.

## Foodservice Companies

**1. Create a strong, time-bound, publicly available sustainable seafood policy.** Companies with guidelines covering all seafood categories are better able to ensure that they are not causing undue harm to the oceans or people throughout their operations. Avoid seafood connected to overfishing, destructive fishing and farming methods, or the unethical treatment of workers, even if it is third-party certified or involved in FIPs or AIPs.<sup>viii</sup> Move beyond red- or yellow-rated species: source only green-rated species.<sup>84</sup>

**2. Take action to stop forced labor, labor abuse, and IUU fishing.** Foodservice companies must improve traceability, transparency, and enforcement mechanisms to ensure that any seafood they source is free of labor and human rights abuses. This includes requiring third-party supplier audits, banning purchases of tuna transshipped at sea unless strict conditions are met, and ensuring workers throughout the supply chain are treated ethically.

**3. Support initiatives and advocate for positive change for our oceans and the people who rely on and catch seafood.** Foodservice companies must engage in the political process regarding ocean conservation, fishery management, and the protection of workers' rights. Companies must use their buying power to create change through these processes, and encourage clients and consumers to advocate for workers and our oceans too.

**4. Increase transparency through key data elements, chain of custody, and education.** Responsible seafood is impossible to achieve without establishing strong traceability mechanisms. Traceability must cover the fishing vessel or farm to point of sale, allowing seafood clients and consumers to make educated choices based on all available information.

**5. Reduce your plastic footprint.** Evaluate your plastic use and immediately reduce your plastic consumption. Consult programs like *ReThink Disposable*<sup>85</sup> to save money by reducing your plastic footprint. Offer products and delivery solutions across all categories that do not involve single-use "throwaway" plastic.





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## Large Foodservice Clients

**1. Commit to better sourcing.** Create a seafood sourcing policy that helps ensure your company is part of the solution. Require your foodservice provider to meet your strong standards, including rigorous, third-party-audited chain of custody for any seafood provided, from ship or farm to plate.

**2. Demand that foodservice companies eliminate single-use plastic.** Ask your foodservice provider what it is doing to significantly cut its plastic consumption as quickly as possible. Stop purchasing single-use plastic for your operations, and consult programs like *ReThink Disposable*<sup>86</sup> to save money by reducing your plastic footprint.

**3. Sell tuna? Make sure it is sustainable and ethical.** Tell your foodservice provider that you want responsibly caught tuna, and express your concern if it is coming from suppliers that cannot guarantee sustainable and ethical products. Ask for pole and line, troll, handline, or FAD-free catch methods. Find out where the tuna comes from, and never source bluefin tuna.

**4. Do business only with companies that protect workers' rights.** Ask how companies ensure that any workers—from U.S. staff to workers throughout their supply chains—have a voice in the workplace, are paid a living wage, and work in safe conditions. If your foodservice provider's response is only to share its written policy, take your business elsewhere.

**5. Vote with your dollar.** Use the Seafood Watch app,<sup>87</sup> and buy only green-rated “Best Choices” seafood from businesses making sustainable choices. Ask how your foodservice provider is addressing concerns about forced labor, labor abuse, and illegal fishing. If you are not satisfied with its response, take your business elsewhere.

## Consumers

**1. Know the facts and speak your mind.** Visit [greenpeace.org/seafood](http://greenpeace.org/seafood) to learn more, and join Greenpeace Greenwire<sup>88</sup> to connect with folks in your community and take action together. Bring your friends and tell your foodservice provider—whether at your local restaurant, school, corporate campus, or hospital—that you want only responsible seafood.

**2. Join the #BreakFreeFromPlastic movement.** Sign up here<sup>89</sup> and demand that foodservice companies immediately reduce their plastic consumption.

**3. Eat tuna? Make sure it is sustainable and ethical.** Tell your foodservice provider that you want responsibly caught tuna, and express your concern if it is coming from suppliers that cannot guarantee sustainable and ethical products.

**4. Vote with your dollar.** Use the Seafood Watch app<sup>90</sup> and buy only green-rated “Best Choices” seafood from businesses making sustainable choices. Ask how your foodservice provider is addressing concerns about forced labor, labor abuse, and illegal fishing. If you are not satisfied with its response, take your business elsewhere.

**5. Eat less seafood.** Today’s demand for seafood far outweighs what can be sustainably sourced. Reducing seafood consumption now can help lessen the pressure on our oceans, ensuring fish for the future.

# Company Profiles



# #1 Sodexo USA

Overall Score:

61.7



Policy: 64.1 Sourcing: 67.4 Advocacy: 64.3 Traceability: 62.5 Inventory: 49.6

**Headquarters:** Gaithersburg, MD

**Background:** Sodexo Group is one of the top-three (by revenue) foodservice management companies in the world, operating in 80 countries globally. Sodexo North America (U.S., Canada, and Puerto Rico) posted \$9.5 billion in FY 2016 sales. Sodexo North America is the highest-performing segment (43% of 2016 revenue) for Sodexo Group. Recent Sodexo contract wins include the Hollywood Bowl and United Airlines clubs and lounges worldwide,<sup>91</sup> The Citadel,<sup>92</sup> Marquette University,<sup>93</sup> and Florida State University.<sup>94</sup>

**Greenpeace Comments:** Sodexo held its position as the highest-ranked company in this report and advanced even further this year, increasing by more than 20 points over its 2016 score. It is less than six points from a “green” ranking. Sodexo saw sizable improvements in its sourcing, advocacy, and traceability scores. Much of its performance is the result of public-facing seafood policies, extensive internal communication of its standards, NGO and supplier engagement, robust auditing systems, and refusal to purchase several red list species.

Sodexo has an impressive responsible seafood program that provides operators with procurement guidance based on Seafood Watch criteria and other NGO recommendations. While the company does purchase eco-certified seafood, it seeks to avoid the pitfalls of eco-certifications by consulting experts on best available sustainable seafood options. Unfortunately, Sodexo has not yet reached full compliance with its policy, as it still sources several red list species.

While Sodexo sources some responsibly caught tuna, it still has yet to make its mark in shelf-stable tuna. Compass Group and Aramark have made major public tuna commitments and significant procurement changes, noting the importance of sustainability and human rights in the tuna industry. To fulfill this commitment, Sodexo may have to break with its public goals to source *only* MSC-certified tuna or tuna from International Seafood Sustainability Association (ISSA) members; neither goal guarantees that Sodexo will source sustainable or ethical tuna. The International Seafood Sustainability Foundation (ISSF) has advocated for stronger RFMO regulations, but ISSF's own standards for its member companies are weak and of limited scope.<sup>95</sup> MSC certification is plagued with concerns (see page 3) and lacks meaningful standards to prevent labor or human rights abuses.<sup>96</sup>

Sodexo has engaged its suppliers regarding concerns associated with transshipment at sea in tuna supply chains. While it appears that most of Sodexo's tuna suppliers do not currently engage in

transshipment at sea, Sodexo must go further (like Thai Union) by publicly committing to a moratorium until the associated issues are addressed. As U.S. foodservice companies and suppliers like Thai Union take action to source responsible tuna, so too should Sodexo.

Sodexo is a member of the Seafood Task Force and Global Sustainable Seafood Initiative. It joined several other businesses by signing on to a March 2017 letter to several RFMOs calling for improved tuna fishing enforcement measures. Sodexo is working to reduce the impact of single-use plastic (and other wasteful) packaging by engaging its clients, NGOs, and intergovernmental organizations. Some operators have phased out disposable to-go containers or participated in the *OneLessStraw* campaign.<sup>97</sup> Sodexo makes plastic alternatives available for its clients and guests.

Unlike Compass Group and Aramark, Sodexo has extensive auditing systems covering sustainability and social responsibility, with robust and time-sensitive measures to correct (or terminate) suppliers in violation of company policies. Sodexo should now make the results of its audits publicly available. Sodexo has the strongest written policies of any company in this report to ensure workers' rights throughout its supply chains, and its international framework agreement with the International Union of Food Workers is important. However, like its competitors, Sodexo has been criticized for failing to pay living wages for frontline employees.<sup>98</sup>

Sodexo's inventory score improved following significant efforts to procure more sustainable and mitigated alternatives across several wild and farmed species. The company does not permit operators to procure orange roughy or Chilean seabass because of sustainability concerns. And unlike most companies profiled in this report, Sodexo does not carry yellowfin or bigeye tuna. While this is great news given stock concerns, Sodexo must embed these tuna standards in its policy to ensure it avoids sourcing these species on a permanent basis.

**Recommendations:** As the top-ranked company in *Sea of Distress*, Sodexo has the opportunity to inspire significant industry-wide improvements. Sodexo can build on its momentum by releasing a public, responsible shelf-stable tuna commitment that includes a commitment to remove problematic transshipment at sea from its tuna supply chains. Sodexo should continue to phase out red list seafood and strengthen its seafood policy to support marine protected areas. Sodexo must continue to take action to protect workers' rights throughout its supply chains.

## #2 Aramark



Overall Score:

57.6

Policy: 63 Sourcing: 56.5 Advocacy: 98.2 Traceability: 37.5 Inventory: 44.3

**Headquarters:** Philadelphia, PA

**Background:** Aramark is a global foodservice management company operating in 19 countries. Its North American segment generated \$10.1 billion in FY 2016 sales. Similar to Compass Group and Sodexo, the U.S. is Aramark's top-performing market. Aramark provided services for various NCAA championships and the Democratic and Republican national conventions,<sup>99</sup> extended its Western Kentucky University contract,<sup>100</sup> and won new contracts with Temple University,<sup>101</sup> University of South Carolina,<sup>102</sup> Minnesota Vikings, and the Rock & Roll Hall of Fame.<sup>103</sup> It recently acquired the procurement organization HSPI.<sup>104</sup>

**Greenpeace Comments:** Aramark improved in nearly every category this year, moving past Compass Group to secure second place. For the second time, Aramark led among profiled companies on advocacy, achieving a nearly perfect score in this section. Aramark continues to have one of the strongest tuna commitments to date among U.S. foodservice companies, with 93% compliance as of 2017, and now has published its detailed seafood policy online.<sup>105</sup>

Aramark's policy reflects its commitment to avoid sourcing all Seafood Watch red-rated species for contracted purchases by 2018. As Aramark moves toward this goal, it should take a hard look at the remaining red list items in its inventory. Fortunately, it is transitioning wild and farmed shrimp to a supplier that provides only species that are yellow-rated or higher, and is doing the same for salmon. Aramark has one of the strongest shelf-stable tuna policies in the foodservice industry—it does not procure destructive FAD-caught skipjack and sources some pole and line albacore.<sup>106</sup>

Aramark has processes to address human rights concerns with its suppliers. Aramark was one of several large buyers that used its purchasing power to call on Thai Union to improve its operations. As Thai Union tackles transshipment at sea in its tuna supply chains, Aramark has an opportunity to further leverage its position in the supply chain to call for reforms. Greenpeace commends Aramark on its policy to avoid transshipment at sea<sup>107</sup> and urges the company to ensure compliance across all categories of its tuna supply chains. As one of Sysco's largest clients<sup>108</sup> and an active participant in various stakeholder meetings (e.g., Seafood Watch Sustainable Seafood Roundtable), Aramark has the means to encourage other responsible foodservice companies to remove transshipment at sea from their tuna supply chains until there are significant reforms that address IUU fishing, human rights abuses, and destructive fishing associated with the practice.

Aramark aced the advocacy category by addressing key issues. It engaged its suppliers on the problems with transshipment at sea in the tuna industry, urged RFMOs to make improvements in fisheries management, collaborated with NGOs on human rights, and reduced its single-use plastic footprint. Aramark partners with Seafood Watch and participates in advocacy initiatives for improved fisheries management (e.g., calling on the International Commission for the Conservation of Atlantic Tunas [ICCAT] and the Western and Central Pacific Fisheries Commission [WCPFC] to develop and implement tuna harvest strategies). Aramark's major distribution agreement with Sysco<sup>109</sup> is an opportunity—and Aramark's responsibility—to move Sysco toward more responsible operations. Aramark should adopt a policy to avoid sourcing from existing or proposed marine protected areas.

Aramark continues to develop audit systems that complement existing procedures of its suppliers. This is especially important given concerns regarding poor traceability in the foodservice industry (see pages 8–9). Aramark should provide updates and share insights with the Sustainable Seafood Roundtable, so the industry can also work to ensure traceability, sustainability, social equity, and the health and safety of workers across foodservice seafood supply chains. Aramark must ensure workers' rights, including fair wages and the right to freedom of association and collective bargaining.

Aramark improved its tuna sourcing in alignment with its public commitment. Its current efforts to source several species more sustainably should help the company reach its 2018 goal of sourcing 100% sustainable seafood for contracted purchases. As Aramark approaches 2018, this will hopefully include education initiatives and measures that make it impossible for operators to purchase red list species like orange roughy.

**Recommendations:** Aramark can continue to improve by achieving its 2018 sustainability commitments, promoting its efforts to avoid transshipment at sea in its tuna supply chains, using its significant buying power to demand that Sysco improve, and removing red list species from its operations. Aramark must strengthen its traceability and audit systems, expand on its efforts to eliminate single-use plastic, and protect workers' rights throughout its supply chains. Aramark's leadership can encourage improvement among industry stakeholders that are failing to act with the same level of urgency.

# #3 Compass Group USA

Overall Score:

51.7



**Headquarters:** Charlotte, NC

**Background:** Compass Group is the largest foodservice management company in the world, operating in more than 50 countries and serving nearly 4 billion meals a year. Compass Group USA (including Canada) generated \$16 billion in FY 2016, which was more than half of its parent company's annual global revenue. Compass Group recently won new contracts with Coach, Oracle, University of Notre Dame, Furman University, McLaren Health Care Corporation, and the Greater Columbus Convention Center.<sup>110</sup>

**Subsidiaries:** Bon Appétit Management Company, Canteen Vending, Chartwells Higher Education, Compass Group Canada/ESS North America, Compass One Healthcare, Culinart Group, Eurest, Foodbuy (procurement organization), Flik, Levy Restaurants, Morrison Community Living, Restaurant Associates, RMA Hospitality Management, Touchpoint, Wolfgang Puck Catering<sup>111</sup>

**Greenpeace Comments:** Even though it lost its second-place position to Aramark, Compass Group remains among the top-three highest-ranked companies in this report. The company is continuing to progress toward its 2017 goal of sourcing species that are yellow rated or higher for contracted purchases.

Compass Group was the first U.S. foodservice company to publicly commit to source responsible shelf-stable tuna (i.e., FAD-free skipjack) in 2014.<sup>112</sup> The company is slowly introducing more sustainable yellowfin and albacore products. Compass Group's preferred vendor, Mitsui Foods, is supplied by Thai Union. As Thai Union implements its new tuna commitments,<sup>113</sup> Compass Group has a prime opportunity to join Thai Union by publicly committing to not source any tuna that was transshipped at sea until strict conditions are met.

Compass Group shares its responsible sourcing policy documents on its global website—including its human rights, workplace health and safety, environment, and supply chain integrity policies.<sup>114</sup> Compass Group USA, however, needs to ensure these policies, including its sustainable seafood policy, are clearly available on its U.S. website.

Compass Group has continued to make improvements since announcing its sustainable seafood commitment in 2006. Like Aramark, Compass Group partners with Seafood Watch. As a member of the Sustainable Seafood Roundtable, Compass Group continues to advocate for improved fisheries management (e.g., calling on ICCAT and WCPFC to develop and implement tuna harvest strategies). Compass Group could make a significant impact by advocating for marine protected areas and communicating its ongoing sustainability efforts with buyers, clients, and consumers.

Compass Group should be commended for publicly detailing its challenges and working to improve supply chain transparency to benchmark against its sustainable seafood commitments.<sup>115</sup> Compass Group must develop its internal and third-party auditing standards to assess the social equity and safety of workers, as well as sustainability. Relying on eco-certifications (see page 3) or Seafood Watch recommendations alone will not protect the company against risks associated with human rights abuses or IUU fishing. And as companies take action to protect workers' rights abroad, Compass Group must work diligently to ensure workers' rights in the U.S.

Compass Group recently began transitioning to more responsibly farmed Atlantic salmon.<sup>116</sup> Greenpeace encourages Compass Group to keep the public updated on its progress and educate its operators and guests on why it is making these improvements. Compass Group must also improve its farmed shrimp sourcing and uphold strict internal protocols, to ensure that operators do not procure red list Seafood Watch species like orange roughy. As part of its global policy, Compass Group does not sell any genetically modified products or animals.<sup>117</sup> This is timely, as genetically modified salmon is now being sold to consumers in Canada (with insufficient labeling).

As plastic continues to choke the oceans and threaten marine life, Compass Group must use its buying power in the U.S. and globally to lead on reducing single-use plastic throughout its supply chains. While Compass Group appears to have some global initiatives for supplier packaging<sup>118</sup> and some operator-specific initiatives (see pages 10–11), it is unclear how the largest U.S. (and global) contract management company will help stop the proliferation of plastic.

**Recommendations:** Compass Group needs to release a strong, public U.S. seafood policy (including the shelf-stable category), and engage Mitsui Foods to support implementation of Thai Union's tuna commitments. It must develop strong auditing procedures to ensure compliance against its environmental and social standards, and strengthen its traceability systems. This will help the company eliminate all red list species from its supply chains and achieve its sustainability goals. Compass Group must ensure that workers in the U.S. and abroad are treated ethically, paid fair wages, and have the right to freedom of association and representation. Compass Group can lead foodservice management companies to eliminate single-use plastic.

# #4 Performance Food Group

Overall Score:

31.5



Policy: 34.8 Sourcing: 34.8 Advocacy: 25 Traceability: 38.8 Inventory: 21.1

**Headquarters:** Richmond, VA

**Background:** PFG is the third-largest U.S. broadline distributor, after Sysco and US Foods. In FY 2016, PFG generated \$16.1 billion and more than \$1 billion in seafood. PFG recently won a major contract with Red Lobster<sup>119</sup> and bought Orlando-based Bar Harbor Seafood in April 2017.<sup>120</sup>

**Subsidiaries:** Bar Harbor Seafood, Performance Foodservice, PFG Customized,<sup>ix,121</sup> Vistar

**Greenpeace Comments:** While PFG failed this assessment, it improved dramatically since last year (by 24 points—the most improved company). The company provided more information than in 2016, enabling a more robust evaluation of its operations. PFG has an internal sustainable seafood policy that builds on its public sustainability commitments.<sup>122</sup> While this is a good start, given its size and position in the foodservice supply chain, PFG must increase the strength and visibility of its initiatives.

PFG works with its suppliers on responsible sourcing and will cut contracts if suppliers violate company policies, especially regarding labor or human rights abuses. The company was one of several large seafood buyers that helped Thai Union understand the urgency of addressing labor and human rights concerns. PFG should be commended for engaging in tough but necessary conversations with its suppliers when the health of the ocean and human rights are at stake. PFG has an opportunity to continue using its buying power to ensure progressive companies can fulfill their ambitious commitments to provide responsible seafood.

PFG has some traceability initiatives, and is even asking its tuna suppliers whether they transship at sea. The company requires all suppliers to perform satisfactorily in an annual third-party audit. However, it is unclear if these audits go beyond food safety to fully evaluate sustainability, social equity, health and safety of workers, and ship- and farm-to-shelf traceability. PFG's *PathProven* system applies only to some seafood species, and while the company does DNA testing on commonly mislabeled species,<sup>123</sup> this only applies to PFG-branded seafood. PFG considers the impacts of sourcing each species, though details remain unclear. The company must exercise caution when relying on industry-funded groups like ISSF for its sustainable seafood program, as ISSF falls short in key areas and cannot guarantee sustainable, ethical seafood.<sup>124</sup>

PFG needs to avoid any red list species like Chilean seabass. It appears to be working to improve its tuna sourcing, though to do so it should look beyond FIPs or MSC certification and instead focus on the health of tuna fisheries, gear type, working conditions, and eliminating problem practices like transshipment at sea from its tuna supply chains. PFG can join other foodservice companies by making meaningful changes to its shelf-stable tuna inventory by sourcing only FAD-free or pole and line caught tuna.

Recently, PFG subsidiary Vistar has been the subject of labor protests for alleged pay discrimination against women.<sup>125, 126</sup> As PFG and other U.S. foodservice companies continue to post record profits, now is the time to ensure that workers' rights are prioritized in the foodservice industry. PFG must continue to use its market influence and invest resources to address human rights abuses in the seafood industry and ensure that its own workers are treated well.

**Recommendations:** PFG is large enough to use its buying power to improve the industry, and is arguably more nimble than its larger competitors to reform rapidly. PFG must release a strong, public seafood policy to guide its procurement decisions and assure clients that it is prioritizing responsible seafood. The company must clearly articulate how it is working to protect workers' rights throughout its supply chains, including providing more detail about its audit procedures. Finally, PFG needs to be more vocal throughout industry and government and among NGOs to reform the seafood industry.

<sup>ix</sup> Supplies Bonefish Grill, Carrabba's Italian Grill, Chili's, Cracker Barrel, Outback Steakhouse, Ruby Tuesday, and TGI Friday's.

# #5 Sysco

Overall Score:

27.2



**Headquarters:** Houston, TX

**Background:** Sysco, the largest broadline distributor in the U.S. and worldwide, supplies roughly 425,000 customers,<sup>127</sup> and generated \$50.4 billion in FY 2016 revenue. Sysco sold more than \$2.5 billion of seafood in 2016, and the company is continuing to grow. Many contract management companies and operators—from university cafeterias to corporate dining halls, restaurants, and even the U.S. Congress—rely on Sysco to procure and deliver food.

**Subsidiaries:** Breaks Group, Buckhead Beef Company, European Imports, Houston Meat & Seafood, Imperial Seafood and Shellfish Company, Louisiana Foods Global Seafood Source, North Star Seafood, SYGMA<sup>128</sup>

**Greenpeace Comments:** While Sysco's score improved, it still failed and is now ranked below its rival PFG. Sysco has several seafood initiatives; however, the information it provided Greenpeace was not specific enough for a detailed evaluation of Sysco's sustainable seafood program. As the largest broadline distributor in the country and top supplier for many of the contract management companies profiled in this report, Sysco has an enormous responsibility to offer innovative solutions that can shift the entire paradigm in the U.S. foodservice industry.

Sysco has a public commitment to source MSC-certified products, or seafood either in MSC assessment or in a FIP, and has improved its sourcing based on these criteria.<sup>129</sup> The company received credit for having a public-facing policy; however, it is not very strong, and primarily features goals and updates. While Greenpeace commends Sysco for its public seafood commitments and communicating progress updates, its commitments are problematic because they depend heavily on flawed eco-certifications like MSC.<sup>x</sup>

While Sysco offers some responsibly caught tuna, its tuna standards are incredibly weak. Sysco merely sources tuna from ISSA members—a practice that does not guarantee responsible tuna. If Sysco were serious about sustainable tuna, it would release a stronger policy that accounts for gaps in eco-certifications and low-bar ISSF/ISSA standards.<sup>130</sup> Furthermore, Sysco should be wary of some ISSA member companies. Bumble Bee plead guilty for tuna price fixing,<sup>131</sup> a former StarKist executive plead guilty to price fixing,<sup>132</sup> StarKist was recently fined for wastewater violations,<sup>133</sup> and both companies are alleged to have colluded to block sustainable tuna in the U.S. market.<sup>134</sup> Sysco must release a more detailed, public sustainable seafood policy that includes plans to supply responsible shelf-stable tuna.

Sysco policies, like those of its competitors, state it does not knowingly source seafood caught by forced labor or by people working in abusive labor conditions. Sysco has previously stopped some purchases of high-risk species (e.g., farmed shrimp) because of labor concerns. As scandals throughout the seafood industry persist, Sysco must proactively use its buying power and market influence to spur industry-wide reforms. For example, Sysco should follow Thai Union's leadership by committing to stop buying tuna that was transshipped at sea until sustainability and labor concerns are addressed. Through its business relationship, Sysco can work with Thai Union to help ensure Thai Union is successful in implementing its commitments.<sup>135</sup>

Sysco has a history of struggling to treat its workers fairly.<sup>136, 137, 138</sup> It is unclear what changes have been made to ensure workers are paid fair wages and assured the right to freedom of association and collective bargaining. As more companies focus on ethical treatment of seafood workers further up the supply chain, they must also ensure proper treatment of their U.S. workforce.

Sysco performed poorly in the advocacy category, as it has done little more than partner with the World Wildlife Fund to source eco-certified products. The company is working to improve traceability throughout its supply chains and works with third-party auditors like UL to review suppliers for Sysco brand products against Sysco's standards, as well as suppliers from high-risk areas. Sysco should strengthen these efforts by expanding the scope of these audits to also include sustainability and worker health and safety, and to audit *all* of its suppliers on a recurring basis.

Sysco also performed poorly in the inventory category because of lack of information regarding its seafood procurement. As Sysco works to meet its 2020 seafood commitments, the company should ensure that *all seafood* it purchases is in compliance with its policy, not just Sysco brand products.

**Recommendations:** While Sysco failed this year's assessment, it has devoted resources to sustainable seafood. Through its supplier relationship with Thai Union, Sysco can work to procure more responsible tuna and join Thai Union by committing to remove problematic transshipment at sea from Sysco's tuna supply chains. Sysco must address systemic problems in the foodservice industry (e.g., rebates, lack of traceability), advocate for reforms, and ensure that workers throughout its supply chains are treated fairly and are provided the right to free and fair choice of union representation without employer interference. Perhaps *this is the year* Sysco will productively engage with Greenpeace to strengthen its program.

<sup>x</sup> Sysco's new 2020 goal is an improvement, now including high-volume aquaculture products (e.g., shrimp, salmon). It focuses on wild-caught top-15 species, but allows other critical species (e.g., orange roughy via Buckhead Beef, sharks via Honolulu Fish Company) to be sold without hesitation. A clear, strong, public sustainable seafood policy is needed to address the weaknesses in eco-certifications (e.g., MSC, ASC, BAP) and FIPs (see page 3).

# #6 Centerplate



Overall Score:

24.1

Policy: 40.2 Sourcing: 16.3 Advocacy: 46.4 Traceability: 17.5 Inventory: 5.7



**Headquarters:** Stamford, CT

**Background:** Centerplate operates in the U.S. and UK, specializing in the sports and entertainment segment. Its FY 2016 sales were \$850 million. Some of Centerplate's recently operated events include the Belmont Stakes, Bethpage Air Show, and U.S. Presidential Inaugural Ball. Recent contract wins include the Las Vegas Convention Center and Washington State Ferries.<sup>139</sup>

**Greenpeace Comments:** While it still failed, Centerplate doubled its score from 2016 as a result of policy and sourcing improvements and supplier engagement (e.g., communicating its policy requirements, dropping unsustainable brands). Centerplate's internal advocacy efforts are encouraging, particularly its policy development and buyer education. The company's new seafood policy should help bolster existing sustainable seafood operations (e.g., local, traceable seafood sourcing at Safeco Field) and ensure operator compliance nationwide.

Centerplate is improving its procurement according to Seafood Watch criteria to ensure it does not source red list species, and is working to transition to pole and line caught tuna. In response to sustainability and human rights concerns, Centerplate implemented a policy to avoid Thai Union products until Thai Union improves its operations. Given Thai Union's new tuna commitments, Centerplate should consider how it could integrate similar requirements (e.g., no problematic transshipment at sea in its tuna supply chains).

While Centerplate provided some information for this assessment, its lack of transparency negatively affected its score, particularly in the inventory category. It remains unclear how Centerplate is working company-wide and with its suppliers to eliminate single-use plastic, which, given the amount disposable packaging in sportservice, would significantly help reduce ocean pollution. Fortunately, efforts are underway to provide more information about Centerplate's initiatives online—Greenpeace commends Centerplate on this development.

**Recommendations:** Centerplate must strengthen its seafood program by releasing a public policy, increasing overall transparency, and advocating for industry reform. The company should clearly articulate how it is working to provide employees with fair, living wages, safe working conditions, and the right to freedom of association and representation, as well as for all workers throughout its supply chains.

# #7 Delaware North



Overall Score:

13.8

Policy: 21.4 Sourcing: 9.8 Advocacy: 14.3 Traceability: 17.5 Inventory: 5.7

**Headquarters:** Buffalo, NY

**Background:** Delaware North reported \$2.8 billion in FY 2016 revenue. The company operates a variety of segments in the U.S. and abroad, including sportservice, entertainment, parks and resorts, and airports. Delaware North operates at several professional league sports stadiums (including for the World Series)<sup>140</sup> and Boston's City Hall Plaza, and recently extended its contract at the Kennedy Space Center.<sup>141</sup>

**Subsidiaries:** Delaware North operates several subsidiaries under Delaware North Companies: Sportservice, Gaming & Entertainment, International, Parks & Resorts, Travel Hospitality Services, and Boston. The company holds a majority interest in Patina Restaurant Group.

**Greenpeace Comments:** While the company shared some of its recent seafood-related initiatives with Greenpeace, it did not fully participate in the survey assessment process. The company has plans to improve its sourcing and create more partnerships around sustainable seafood. Since most of Delaware North's progress appears to be setting a foundation for its responsible seafood program, its score only improved slightly.

Delaware North has an internal sustainable seafood policy and appears to offer more sustainable seafood in some locations,<sup>142</sup> however, it must greatly expand its scope to match the rigor of the top-ranked management companies. Fortunately, Delaware North is working to develop a more robust policy that would markedly improve its performance in this assessment and improve consumer confidence in its ability to provide responsible seafood.

Delaware North purchases some eco-certified products, though this is a relatively small percentage of its overall seafood inventory. Because of unresolved sustainability and labor concerns associated with eco-certifications (see page 3), Delaware North should not make the mistake of other companies by sourcing only MSC-, BAP-, or ASC-certified seafood. The company issued an internal sustainable seafood survey to determine whether its clients source local and/or sustainable seafood. It has also worked with the Monterey Bay Aquarium and others to support the UN's Sustainable Development Goal 14 to protect the marine environment.

**Recommendations:** Delaware North must use its newfound momentum to swiftly release a strong, public sustainable seafood policy and incorporate the company's drive for innovation to benefit the oceans and workers throughout its supply chains. Any NGOs working with Delaware North should similarly encourage the company to act now to ensure its supply chains are free of destructive fishing or possible labor abuse, and encourage the company to remove problem practices from its supply chains (e.g., implement a moratorium on transshipment at sea for tuna until strict conditions are met).

# #8 AVI Foodsystems

Overall Score:

12.8



Policy: 5.4 Sourcing: 8.7 Advocacy: 14.3 Traceability: 15 Inventory: 22.9

**Headquarters:** Warren, OH

**Background:** AVI Foodsystems is a family-owned business with \$650 million in FY 2016 revenue. It focuses primarily on B&I, followed by higher education and healthcare segments. Recent contract wins include the Football Hall of Fame, Daimler Trucks, The School of American Ballet, and The Juilliard School.<sup>143</sup>

**Greenpeace Comments:** AVI provided more information this year about its operations; however, several questions remain. Its website offers some information about its general environmental practices, but there is no sustainable seafood information whatsoever—an enormous oversight. Thus, Greenpeace has no policies or commitments to evaluate.

Some of AVI's higher education clients use traceable seafood systems like Open Ocean Trading and speak publicly about sustainability, but this does not mean that the company has implemented responsible seafood sourcing throughout its operations. To comply with its new AVI Pure sustainability program, the company should incorporate responsible seafood into this platform to ensure that it only provides sustainable, ethical seafood nationwide.

**Recommendations:** AVI could improve on sustainable seafood if its leadership invests the resources—it can start by releasing a public seafood policy. This should be manageable for a company of its size and would bolster the family-owned company's reputation, while offering clients better products. Until these improvements are made, AVI may still be an unwise choice for clients seeking responsible seafood.

# #9 Reinhart Foodservice



Overall Score:

12.6

DID NOT RESPOND



**Headquarters:** Rosemont, IL

**Background:** Reinhart Foodservice is owned by Reyes Holdings. Reyes' FY 2016 revenue was \$26.5 billion. Reinhart acquired Black River Produce in 2016 to strengthen its presence in New England.<sup>144</sup> Reinhart primarily operates across the eastern half of the U.S., serving a variety of clients across industry segments, including restaurants and several government contracts.

**Greenpeace Comments:** Reinhart did not respond to repeated inquiries from Greenpeace. As the fifth-largest broadline distributor in the U.S., Reinhart is failing to deliver on sustainable, ethical seafood that ensures healthy oceans and the safety of workers throughout its supply chains.

While the company has some blogs on sustainability, it does not specify what it is doing to prioritize responsible seafood. Reinhart's praising its suppliers for modest initiatives (e.g., FIPs, MSC certification)<sup>145</sup> suggests the company may lack its own strong standards that go beyond eco-certifications. Its flashy website lacks relevant information, and Reinhart does not have a public sustainable seafood policy. However, the company did receive credit for providing its seafood inventory online—a rarity among broadline distributors.

Clients should quickly notice the company's lack of sophistication and focus on responsible seafood. In addition to sharks, Reinhart sources **bluefin tuna: a severely overfished species** red listed by Seafood Watch for every single stock globally.<sup>146</sup> Sourcing bluefin tuna is a glaring example of Reinhart's inability to prioritize responsible seafood. Its newest acquisition, Black River Produce, links to Seafood Watch on its website.<sup>147</sup> If indeed the company sources more sustainable seafood based on Seafood Watch recommendations, perhaps it can encourage its parent company, Reinhart, to stop sourcing red list species.

In 2016, a shelving unit collapsed at one of Reinhart's warehouses, killing one worker and injuring seven others, just days after a worker allegedly told a supervisor the shelving appeared unstable.<sup>148</sup> Increased vigilance for health and safety in the transportation and warehousing industries is warranted, given injury and illness rates are the highest among private industry and injury rates have increased in recent years.<sup>149</sup> It remains unclear what Reinhart is doing to ensure safe and ethical working conditions for workers in the U.S. and throughout its supply chains.

**Recommendations:** Reinhart must urgently improve on seafood sustainability and labor rights. It must immediately stop selling bluefin tuna. Companies should be wary of doing business with Reinhart until the company can guarantee it has improved its seafood and labor operations.

# #10 Food Services of America

Overall Score:

10.2



Policy: 8.7 Sourcing: 8.7 Advocacy: 5.4 Traceability: 20 Inventory: 7.1

**Headquarters:** Scottsdale, AZ

**Background:** Food Services of America (FSA) is a broadline distributor and subsidiary of Services Group of America, which generated \$3.6 billion in FY 2016. FSA's geographic focus is in the U.S. Mountain West, West Coast, and Alaska.

**Greenpeace Comments:** FSA failed yet again. Its stagnant performance suggests that, to date, the company may not be prepared to lead on responsible seafood. While it did respond to Greenpeace, FSA did not provide information beyond what is already on its website. In interviews, FSA acknowledges the "importance of protecting the world's seafood resources."<sup>150</sup> However, FSA is clearly lacking a strong, public seafood policy to guide its procurement decisions and assure clients that it is prioritizing responsible seafood.

FSA's online seafood sustainability information includes videos with its seafood director and features its *Flying Flag* brand BAP-certified farmed shrimp. Unfortunately, third-party certifications (e.g., BAP, ASC, MSC) alone are insufficient for any company committed to responsible seafood. Some certification schemes either have anemic standards or do not rigorously evaluate key areas, such as labor violations in supply chains (see page 3). And while FSA has a fairly high union density compared with other U.S. foodservice companies, it remains unclear how FSA protects workers' rights throughout its supply chains, from U.S. operations to suppliers abroad.

**Recommendations:** FSA needs a strong seafood policy ensuring that its products are sustainable and not connected to forced labor or human rights abuses. The company must source responsible seafood, engage credible stakeholders, and increase public communication of its policies and initiatives. This includes releasing a public-facing seafood policy with commitments; implementing third-party audits covering sustainability, social responsibility, and worker health and safety; and advocating for industry reforms.



# #11 Gordon Food Service



Overall Score:

10

DID NOT RESPOND



**Headquarters:** Grand Rapids, MI

**Background:** Gordon Food Service (GFS) touts itself as the “largest family-operated broadline food distribution company in North America.”<sup>151</sup> The company operates in the eastern half of the U.S. and in Canada, mainly supplying restaurant, education, and healthcare segments. It posted \$13 billion in FY 2016 revenue.

**Subsidiaries:** Glazier Foods Company, Halperns’ Steak and Seafood Company, Institutional Distributors, Perkins

**Greenpeace Comments:** GFS did not provide any information for this assessment. The company is among every other broadline distributor that failed this assessment. While GFS has basic language online referencing seafood sustainability,<sup>152</sup> it lacks a strong, public policy that details how GFS ensures compliance with its commitments.

GFS relies on MSC, ASC, and BAP certifications for some products. Eco-certifications can be useful to complement a company’s own sustainable seafood policy, but are insufficient as the sole standards to ensure responsible seafood procurement. For example, MSC is frequently embroiled in controversy for certifying destructive fisheries over the objections of scientists and NGOs. And because MSC lacks strong social standards, it cannot guarantee that MSC-certified seafood is not implicated in labor or human rights abuses (see page 3). GFS’s lack of a strong, public seafood policy leaves its customers wondering whether the company is doing its due diligence to provide responsible seafood.

According to customs import records, GFS has purchased canned tuna from major U.S. brands that typically rely on destructive fishing methods. While Chicken of the Sea will soon offer better options following Thai Union’s commitments, brands like StarKist, in the wake of price-fixing scandals,<sup>153</sup> remain silent on any plans to procure more responsible tuna. GFS must strengthen its tuna sourcing standards, and should follow Thai Union’s lead by removing problematic transshipment at sea from all GFS tuna supply chains.

GFS was fined twice for strength tests the U.S. Department of Labor ruled were illegal and used to discriminate against qualified female applicants for warehouse jobs.<sup>154</sup> The company agreed to pay \$1.8 million in back pay to nearly 1,000 women who were subject to the strength tests. It remains unclear what new policies GFS may have to protect workers’ rights in the U.S. and throughout its seafood supply chains.

GFS has made some preliminary steps in addressing its plastic footprint. As it also operates brick-and-mortar stores, it took a meaningful step by phasing out plastic bags in 2015. All stretch plastic wrap (for pallets) is collected, baled, and recycled. However, it could go further by offering customers more alternatives to single-use plastic items and packaging (see pages 10–11).

**Recommendations:** GFS must demonstrate its commitment to responsible seafood by releasing a public seafood policy across all seafood categories. The company needs to document publicly how it is working to protect its U.S. employees and workers throughout its supply chains. Especially because of its questionable shelf-stable tuna sourcing, GFS must conduct third-party audits to ensure supplier compliance with strong environmental, social responsibility, and worker health and safety standards. GFS needs to drop red list species from its inventory and work with governments, RFMOs, NGOs, and industry to improve global seafood operations. Greenpeace is waiting to offer its expertise if and when GFS is ready to act.

# #11 US Foods



Overall Score:

10

DID NOT RESPOND

Policy:	8.7	Sourcing:	7.6	Advocacy:	10.7	Traceability:	18.8	Inventory:	5

**Headquarters:** Rosemont, IL

**Background:** US Foods, the second-largest broadline distributor in the U.S., posted \$23 billion in FY 2016 revenue. After failing to merge with Sysco, US Foods continued its profit-driven shopping spree, acquiring the following regional distributors and food manufacturers this year: All American Foods, Save on Seafood, FirstClass Foods, F. Christiana and Co., The Thompson Company, Braunger Foods, and Variety Foods. US Foods supplies many foodservice segments, from restaurant operators to education, government, and healthcare.

**Greenpeace Comments:** US Foods failed yet again. Its ranking continues to plummet as other companies make improvements. US Foods did not respond to repeated communications from Greenpeace. Given its size and position in the foodservice supply chain, US Foods has an enormous influence on the seafood available for foodservice operators. It is failing to act responsibly and lags significantly behind competitors Sysco and PFG.

US Foods does not have a public seafood policy, and it is unclear if it has any seafood sourcing standards. While it sources some 4-star BAP shrimp and some tuna from a FIP according to its *Progress Check* program,<sup>155</sup> US Foods does not offer discerning clients enough information on the species to receive status updates for these projects online. Furthermore, eco-certifications have several problems that do not guarantee responsible seafood procurement (see page 3).

US Foods proudly announces partnerships with industry groups, like NFI, that actively work to discredit Greenpeace's reputation while maintaining a destructive status quo in the seafood industry.<sup>156</sup> US Foods recently announced a partnership with Sustainable Fisheries Partnership,<sup>157</sup> a reputable organization; however, with practically no public updates, refusal to respond to Greenpeace, and yet another failing score, it raises serious doubts whether anything will ever change with the nation's second-largest broadline distributor.

US Foods offers private label (*Rykoff-Sexton*) pole and line tuna for both canned skipjack and albacore; however, it is unclear if it procures responsible tuna in volumes significant enough to help transition the tuna industry toward more sustainable fishing methods. US Foods must do far more to ensure responsible tuna procurement, especially following allegations of major tuna brands colluding to block sustainable tuna in the U.S. market.<sup>158</sup> It can start by following Thai Union's commitment to remove problematic transshipment at sea from its tuna supply chains. There is scant additional public information regarding US Foods' seafood inventory, and given the lack of information on any sustainable seafood initiatives, US Foods will likely require significant work to improve.

US Foods has a poor labor track record.<sup>159</sup> In 2016, the company slashed benefits for all nonunion workers at its Arizona distribution center;<sup>160</sup> closed its Severn, MD, warehouse and moved to a nonunion facility in Manassas, VA;<sup>161</sup> and has been the subject of nationwide worker strikes. In 2016, more than 3,500 Teamsters employed by US Foods either went on strike or honored picket lines in Arizona, California, Colorado, Illinois, Indiana, Maryland, Michigan, Minnesota, New Jersey, Ohio, Pennsylvania, and Washington.<sup>162</sup> US Foods must respect workers' rights to form a union, and, throughout its supply chains, must ensure the safety and well-being of workers.

**Recommendations:** US Foods has a responsibility to its workers, clients, and shareholders to dramatically improve its seafood program and treatment of workers. The company must develop a strong, public-facing seafood policy, ensure its products are responsibly sourced, and guarantee fair and ethical treatment of all workers throughout its supply chains. Should US Foods remain intransigent, the company's reputation and sales may suffer as broadline distributors like PFG rise to the challenge.

# #13 Maines Paper & Food Service

Overall Score:

8.5



DID NOT RESPOND

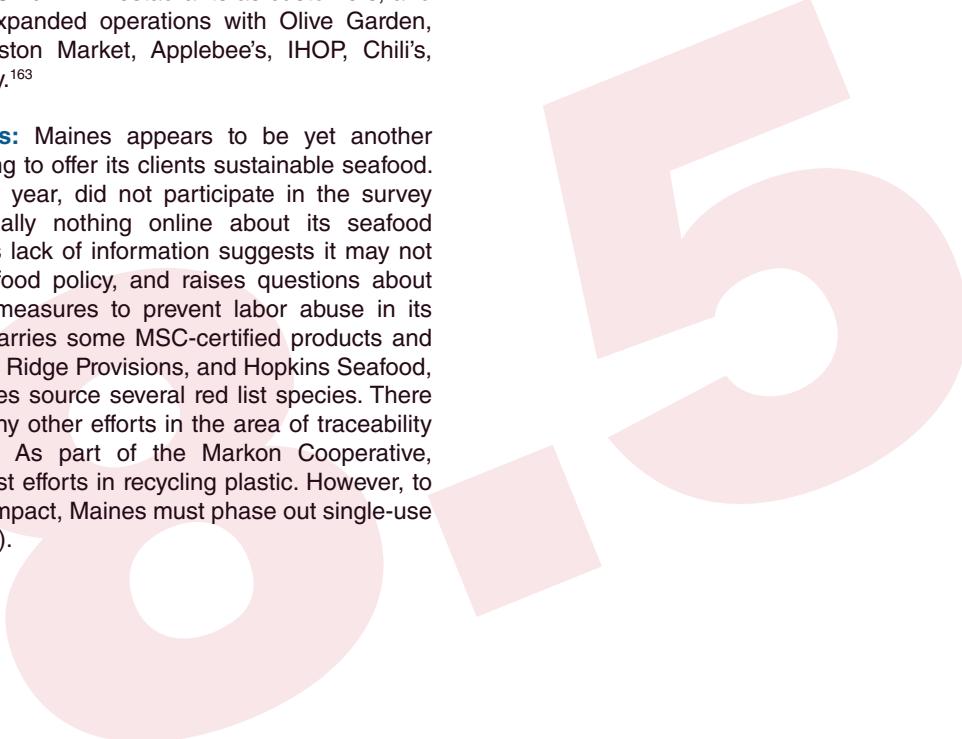


**Headquarters:** Conklin, NY

**Background:** Maines Paper & Food Service is a broadline distributor with a geographic focus in the U.S. Northeast. The company generated \$3.2 billion in FY 2016 sales. Maines recently added Tim Hortons and Chick-fil-A restaurants as customers, and renewed contracts or expanded operations with Olive Garden, Longhorn, Wendy's, Boston Market, Applebee's, IHOP, Chili's, Burger King, and Subway.<sup>163</sup>

**Greenpeace Comments:** Maines appears to be yet another broadline distributor failing to offer its clients sustainable seafood. Maines failed again this year, did not participate in the survey process, and has virtually nothing online about its seafood sourcing. The company's lack of information suggests it may not have a sustainable seafood policy, and raises questions about how it takes proactive measures to prevent labor abuse in its supply chains. Maines carries some MSC-certified products and offers Hidden Bay, Indian Ridge Provisions, and Hopkins Seafood, although these companies source several red list species. There are scant examples of any other efforts in the area of traceability or responsible seafood. As part of the Markon Cooperative, Maines has made modest efforts in recycling plastic. However, to meaningfully reduce its impact, Maines must phase out single-use plastic (see pages 10–11).

**Recommendations:** Maines needs to immediately develop a public seafood policy and prioritize responsible seafood procurement, as well as take action to protect workers' rights throughout its supply chains.



# #14 Shamrock Foods

Overall Score:

8

DID NOT RESPOND



Policy: 5.4 Sourcing: 8.7 Advocacy: 0 Traceability: 15 Inventory: 8.6

**Headquarters:** Phoenix, AZ

**Background:** Shamrock Foods is a broadline distributor owned by Shamrock Foods Company, with a geographic emphasis in the U.S. Southwest. It posted \$3 billion in FY 2016 revenue.

**Greenpeace Comments:** Shamrock Foods failed this assessment again and did not respond to repeated inquiries from Greenpeace. The company carries some MSC-certified seafood; however, it does not have a publicly available seafood policy. And while Shamrock Foods sources some yellow-rated species (e.g., Verlasso farmed salmon), it also sells red list species like sharks. The company needs to develop strong, public standards that go beyond relying on eco-certified seafood, given concerns with this approach (see page 3).

Shamrock Foods does not indicate how it is addressing human rights abuses in the seafood industry, or how it is protecting workers' rights to freedom of association and representation following a ruling from a federal judge that Shamrock Foods actively interfered with a union organizing drive.<sup>164</sup>

**Recommendations:** Shamrock Foods must release a public seafood policy with commitments to improve its sourcing, and articulate how it will protect workers' rights throughout its supply chains. The company must drop red list species; quickly improve any shelf-stable tuna sourcing amid ongoing labor, human rights, and sustainability problems associated with this industry; and improve its advocacy efforts to reform the seafood industry. To uphold its motto to treat "all associates as family,"<sup>165</sup> Shamrock Foods must ensure its U.S. workforce is treated with respect, paid a living wage, and able to freely join representative organizations and bargain collectively.

# #15 Elior North America

Overall Score:

7.3



DID NOT RESPOND

Policy: 4.3 Sourcing: 7.6 Advocacy: 7.1 Traceability: 15 Inventory: 2.9



**Headquarters:** Charlotte, NC

**Background:** Elior North America (Elior NA), a subsidiary of global foodservice company Elior Group, continued its rapid growth, acquiring Lancer Hospitality and Corporate Chefs this year. Largely because of acquisitions, Elior NA posted a 41% increase from FY 2015 to FY 2016, generating \$900 million in revenue. Elior NA is now the fifth-largest U.S. contract management company.<sup>166</sup> Some clients include Los Angeles International Airport,<sup>167</sup> Florida Turnpike travel plazas,<sup>168</sup> and New York Historical Society.<sup>169</sup>

**Subsidiaries:** ABL Management, Aladdin, AmeriServe, A'Viands, Consolidated Food Service Management, Corporate Chefs, Cura Hospitality, FitzVogt & Associates, Lancer Hospitality, Lindley, Preferred Meals, STARR Catering Group, Summit, Valley Services

**Greenpeace Comments:** Unlike its Charlotte neighbor (Compass Group) that is among the industry leaders in this assessment, Elior NA failed yet again. And contrary to its competitor Delaware North, Elior NA has failed to demonstrate that it has *any* sustainable seafood policies or initiatives. As a newer company touting its progressive values, leadership, and modern brand, Elior NA should be leading on responsible seafood. Instead, the company's lack of transparency or any public communications about sustainable seafood landed it in last place, scraping the bottom of this report.

Globally, Elior Group has worked on sustainable seafood and has banned a number of overfished species, but any sustainable seafood information online was in reference to Elior Group's operations in the UK and France, not Elior NA. In its flurry of acquisitions and rapid growth, it remains unclear if Elior NA is doing anything to prioritize responsible seafood procurement.

**Recommendations:** As Elior NA continues its rapid growth, Greenpeace implores the company to not lose sight of sustainability and workers' rights and to live up to its tagline: "Small Enough to Care...Big Enough to Make a Difference."<sup>170</sup> Elior NA must engage with respected conservation, labor, and human rights groups to improve its seafood operations. The company must develop a strong, public sustainable seafood policy, clean up its tuna sourcing, and demand responsibly sourced seafood from broadline distributors like Sysco. Until then, prospective clients should consider looking elsewhere for responsibly sourced seafood.

# Glossary

**Aquaculture Stewardship Council (ASC):** A certification scheme for farmed species. ASC-certified products are supposed to meet certain criteria for responsibly farmed seafood. While it may be a start, it is best for companies to avoid exclusively relying on third-party certifiers.

**Best Aquaculture Practices (BAP):** These third-party standards seek to address environmental and social responsibility, animal welfare, food safety, and traceability in a voluntary certification program for aquaculture facilities. BAP primarily covers shrimp, salmon, tilapia, pangasius, channel catfish, and mussels. Companies sometimes source BAP-certified products according to a coding system (e.g., BAP 2-star, BAP 3-star). While it may be a start, it is best for companies to avoid exclusively relying on third-party certifiers.

**Broadline distributor:** Large foodservice distributors carrying a “full line” of products, including perishables (e.g., meat, seafood, dairy, produce), nonperishables (e.g., canned and dry grocery goods), and supplies necessary for foodservice operations. Broadline distributors carry private label and national brands, deliver products to operators, and have large contracts with a variety of customers, including management companies, GPOs, and restaurants. Broadline distributors in this report include Sysco, US Foods, Performance Food Group, Gordon Food Service, Reinhart Foodservice, Maines Paper & Food Service, Food Services of America, and Shamrock Foods.

**Bycatch:** Marine life unintentionally caught and often killed when fishing (e.g., sharks, turtles, and juvenile tuna). Some fishing methods have a higher rate of bycatch than others, such as tuna fishing with conventional longlines or purse seines employing fish aggregating devices.

**Contract management company:** Also referred to as “foodservice management company” or “management company.” These companies work with various corporate or institutional clients to manage and operate dining services, among other services. Management companies in this report include Compass Group USA, Aramark, Sodexo USA, Centerplate, Delaware North, AVI Foodsystems, and Elior North America.

**FAD:** Fish aggregating device. An artificial, floating object that attracts schools of tuna, along with the (indiscriminate) aggregation of all kinds of marine life. Fishing with FADs leads to unintended collateral damage, or bycatch, in the form of dead sea turtles, sharks, and other fish.<sup>171</sup>

**FAD-free:** Fishing without use of FADs, or setting purse seine nets on free schools of fish. Other marine life is less impacted when fishing free school, so it is a better option.

**FIP:** Fishery improvement project

**Gear type:** A reference to the fishing method used to catch a particular species of fish. Some gear types (like pole and line for tuna) are far more favorable to the environment than others (like trawling for flatfish, which scrapes and damages the ocean floor).

**Group purchasing organization (GPO):** Independently or association-owned national or regional organizations that pool the volume of their members to obtain savings from vendors and manufacturers.<sup>172</sup>

**ICCAT:** International Commission for the Conservation of Atlantic Tunas

**ISSA:** International Seafood Sustainability Association

**ISSF:** International Seafood Sustainability Foundation

**IUU:** Illegal, unreported, and unregulated fishing (also known as pirate fishing).

**Longline:** Fishing lines, sometimes dozens of miles long, baited with thousands of hooks. This is a very indiscriminate, highly destructive fishing gear.<sup>173</sup>

**Marine Stewardship Council (MSC):** Nonprofit organization that runs a certification scheme for wild fisheries. MSC-certified products are supposed to meet certain sustainability criteria. In some cases, this certification may not be the best barometer for whether a wild-caught species was truly caught sustainably. While it may be a start, it is best for foodservice companies to avoid exclusively relying on third-party certifiers.

**NFI:** National Fisheries Institute

**Off-contract purchasing:** Procurement of products from a secondary vendor other than an institution’s primary management company or GPO. This can include “other distributors, local or regional farms and producers, manufacturers, processors, and aggregators.”<sup>174</sup> While off-contract purchases could be a way for operators to purchase sustainable, ethical seafood not available from their management company or GPO, it creates an opaque supply chain because of lack of traceability. Furthermore, major

foodservice companies' sustainable seafood commitments apply only to on-contract purchases. As long as off-contract purchases occur, it is impossible for a foodservice company to guarantee all of its seafood is responsible and in compliance with company policies.

**On-contract purchasing:** Procurement of products from a contracted vendor. Management companies or GPOs typically require institutions to purchase a large percentage of products (e.g., 70–90%) on-contract in order to receive discounted rates.<sup>175</sup>

**Pole and line:** A highly selective form of fishing that has virtually no bycatch, as tuna are caught one by one with a fishing pole and a line.<sup>176</sup>

**Rebates:** Also referred to as volume discount allowances, this system incentivizes on-contract purchasing and awards consumption without regard to environmental or social impacts. Rebates are “refunds or discounts paid to [management companies] and GPOs from distributors, manufacturers and suppliers based on a predetermined volume of sales. This negotiated pricing allows them to offer products at a lower cost to the institutions. Rebates are one of the primary ways that [management companies] maintain profitability and are rewarded for efficiency. There is little transparency in terms of the amount of rebates [management companies] receive as a result of their purchasing practices.”<sup>177</sup>

**Red list:** Refers to a list of species of seafood that should not be bought or sold for various sustainability reasons, ranging from stock status to farming conditions to method of capture. Any red list species in this report is classified as “avoid” according to Seafood Watch recommendations. Seafood Watch does not assess some species and defers to MSC recommendations (e.g., hoki, Alaska pollock). Because of existing concerns with MSC certification (see page 3), for this report, Greenpeace considers any species not evaluated by Seafood Watch as a red list species.

**Regional fishery management organization (RFMO):** An “international body of countries sharing a practical and/or financial interest in managing and conserving fish stocks in a particular region.”<sup>178</sup> There are about 17 RFMOs covering large areas of our oceans. RFMOs are established by international agreements or treaties and can take different forms. RFMO decisions are binding for member countries.

**Responsible seafood:** Synonym: sustainable, ethical seafood

**Responsible tuna:** Synonym: sustainable, ethical tuna

**Seafood Task Force:** Formerly known as the Shrimp Sustainable Supply Chain Task Force, this multi-stakeholder body aims to confront forced labor, human trafficking, and unsustainable fishing in the Thai seafood industry.

**Seafood Watch:** A part of Monterey Bay Aquarium, Seafood Watch educates consumers and businesses through its sustainable seafood recommendations (e.g., Best Choices, Good Alternatives, or Avoid). Seafood Watch partners with companies (including U.S. foodservice management companies) to improve their operations. Greenpeace used Seafood Watch recommendations to evaluate foodservice companies for the inventory category of this report. See also *red list* in this glossary.

**Species name:** Also known as Latin name or scientific name, the species name clarifies precisely what species is in the package. Given that mislabeled seafood is a common problem in the industry and many species of fish are known by several names, this is a key data element foodservice companies should have for any purchased seafood.

**Sustainable, ethical seafood:** Wild-caught or farm-raised seafood using best available fishing and aquaculture practices that mitigate adverse environmental and social impacts. This includes sourcing from healthy stocks, using harvest methods that limit environmental impacts, and sourcing from suppliers who treat workers ethically (e.g., in accordance with ILO Core Conventions, the ILO Maritime Labour Convention, and the ILO Work in Fishing Convention).

**Sustainable, ethical tuna:** Tuna sourced from healthy stocks; caught using sustainable fishing methods, such as pole and line, handline, troll-caught, or purse seine fishing on free schools (i.e., FAD-free); and supplied by workers who are treated ethically (e.g., in accordance with ILO Core Conventions, the ILO Maritime Labour Convention, and the ILO Work in Fishing Convention).

**Sustainable Seafood Roundtable:** A precompetitive forum convened by Monterey Bay Aquarium Seafood Watch for U.S. foodservice companies to collaborate on industry-wide improvements (e.g., improved sourcing for high-volume foodservice categories, including shrimp, salmon, tuna, and whitefish).

**Third-party audit:** Investigation by an independent party, unaffiliated with either the company or the certifying group, of whether the product or process meets the standard holder's standards. While an extremely valuable tool, a third-party auditor's performance is only as good as the standards, which serve as the baseline for the audit.

**Transshipment at sea:** A legal practice wherein one vessel transfers its cargo from its hold to that of another vessel directly next to it, without needing to go to port. This practice is often how unethical companies can commingle legally caught and illegally caught seafood and essentially “launder” pirated seafood, as well as hide labor abuse (see page 8).

**WCPFC:** Western and Central Pacific Fisheries Commission

# Endnotes

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