

SEAFOOD BRANDS 2022

# SEAFOOD PROGRESS





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# OVERVIEW

Seafood Progress is an online tool that has been used to profile major Canadian retailers against their commitments to sustainable and socially responsible seafood since 2017.

Since its inception, SeaChoice has intended to expand the scope of Seafood Progress to include seafood brands to better serve its goal of driving improvements upstream to fisheries and aquaculture practices in Canada. Though the retailers that we profile continue to make progress against their commitments, to date, only half of them cover the national brand seafood products that they sell under their commitments. In this respect, it seems timely to shift our attention one-step upstream to the national brands that supply retailers not only with branded products, but also with unbranded products that are sold through their seafood counters and the products that are re-branded and sold as retailers' private label seafood products.

# SCOPING EXERCISE

In November 2021, SeaChoice conducted an internal market analysis based on publicly available information to determine the most prevalent seafood brands in the Canadian marketplace. The following steps were taken in this analysis:

## **#1: Determine major Canadian retailers, supercentres and wholesale clubs.**

Result: Research conducted via IBISWorld revealed the following major players (5+% market share) in the Canadian retail industry: Loblaw, Sobeys, METRO and Save-On-Foods, and the following major players in the supercentre/wholesale club industry: Costco, Walmart and Loblaw.

## **#2: Establish a basis for analysis.**

In the absence of publicly available information on branded seafood product volumes in Canada, SeaChoice approached third party services to obtain this information, but were informed that it was unobtainable. SeaChoice then proceeded to conduct an analysis based on stock keeping units (SKUs) of branded products sold through the online stores of the businesses identified in Step 1.

It is important to note that this approach was not truly reflective of product units being sold by each seafood brand in the Canadian marketplace because it excludes all unbranded products that brands sell to retailers and supercentres (e.g. in fresh cases alongside meat products), as well as the products that seafood brands supply to retailers and supercentres which then rebrand them and sell them as their own private label products.

## **#3: Select seafood brands to profile on Seafood Progress.**

To ensure accuracy, SKUs by brand were then weighted according to the market share held by each retailer and supercentre. Though this exercise revealed that just a handful of seafood brands currently dominate the Canadian marketplace, SeaChoice decided to profile the top 13 to ensure a diverse representation of product segments and industry actors, and to account for potential fluctuations in market share in future.



# BRANDS

Our scoping exercise resulted in the selection of the following 13 brands to be profiled for the first time on Seafood Progress in May 2022 (in alphabetical order):

- Aqua Star
- BlueWater
- Clearwater
- Clover Leaf (including Brunswick brand)
- DOM
- Export Packers (Diamond Harvest and Ocean Jewel brands)
- High Liner
- Janes
- Ocean Brands (Ocean's, Millionaire's and Gold Seal brands)
- Olivia
- Rio Mare
- Toppits
- True North

# METHODOLOGY

For consistency, Seafood Progress tailored its existing standardized framework for retailers to seafood brands to evaluate the components of brands' commitments and how each compares to the average score across all brands (the "national average"). The assessment framework for brands includes six Steps and 21 key performance indicators (KPIs) and is based on recommendations produced by the Conservation Alliance for Seafood Solutions in their [Common Vision for Sustainable Seafood](#).

From December 2021 until April 2022, Aqua Star, Clearwater, Clover Leaf, DOM, Export Packers, High Liner, Ocean Brands, Rio Mare and Toppits all actively engaged with SeaChoice by attending virtual meetings and providing follow-up information to inform several iterations of their first Seafood Progress profiles.

BlueWater, Janes and Olivia all corresponded with SeaChoice via email only, which better informed some of their profile scores. True North decided not to engage with SeaChoice, and as a result, it is the only 2022 brand profile on Seafood Progress that is based entirely on publicly available information.



*[Click the image to view our methodology for brands](#)*

# RESULTS

**The overall engagement** from the 13 brands that SeaChoice selected was strong, which is fortunate since an initial analysis of publicly available information on their commitments to sustainable and socially responsible seafood proved to be, overall, limited and open to interpretation. SeaChoice was able to provide guidance in this respect to the brands that it engaged with, which resulted in the following 6 brands establishing clear commitments to sustainability and publicizing them on their respective websites for the first time: Clearwater, Clover Leaf, Export Packers, DOM, Ocean Brands and Toppits.

**Disappointingly, the results** show that only two brands - Clover Leaf and Rio Mare - have comprehensive commitments to social responsibility and are collecting and tracing data in their supply chains that is indicative of human rights violations. Additionally, only half of the brands profiled - including High Liner and Ocean Brands - have a code of conduct reflecting their commitment to social responsibility that suppliers are expected to abide by.

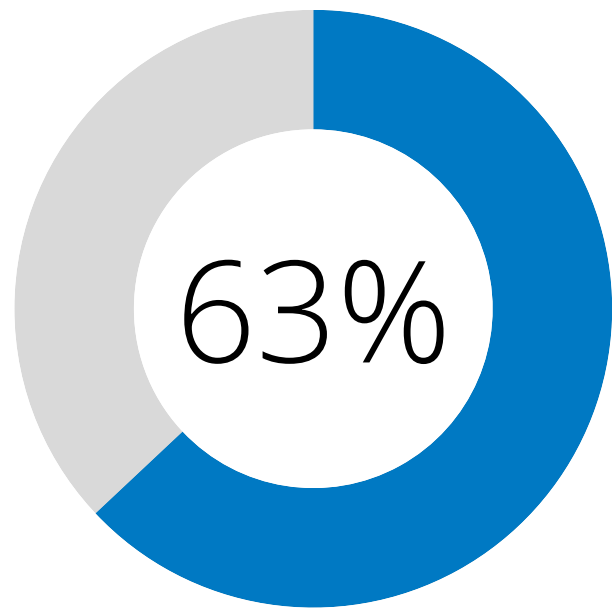
**An inspiring outcome** of SeaChoice engaging with seafood brands is that nearly half of them reported on the percentage of seafood sold in the past year that was in line with their sustainability commitments for the first time through their Seafood Progress profile. The brands to do so were: Clearwater, Clover Leaf, DOM, Export Packers, Toppits and Rio Mare. This directly supports SeaChoice's theory of change for Seafood Progress to serve as a tool to increase supply chain transparency and drive improvements upstream to fisheries and aquaculture practices in Canada.

**The results also reveal** that all brands need to put far more effort into clearly communicating their products' attributes to consumers in store. For instance, approximately 70% apply unverified self claims (e.g. Clearwater's "Responsible Fishing Since 1976" self claim) on product labels which can confuse and mislead consumers on the sustainability of these products.

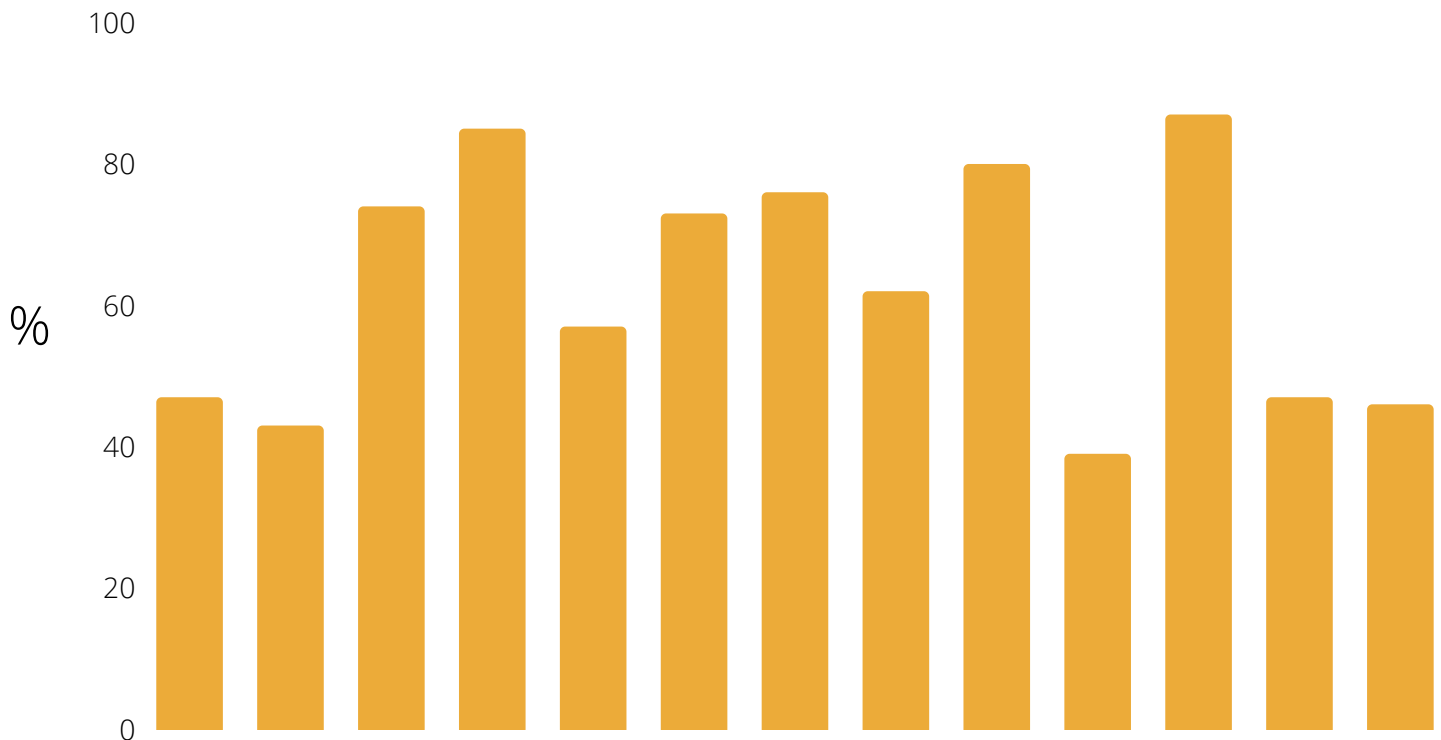
**Finally, the presence** of key information on labels that is required for consumers to make informed purchasing decisions is disappointingly low at 48%. SeaChoice commends Rio Mare for being the only brand to announce action on this through its commitment to label all products with scientific name, geographic origin, wild or farmed and gear type or farming method by the end of 2024.

# NATIONAL AVERAGE

The average score (national average) across all 13 national seafood brands, six Steps and 21 KPIs in 2022 was 63%. A breakdown of the results per step and KPI can be found in the following section. For individual brand scores in 2022, visit [Seafood Progress](#).



## OVERALL SCORES

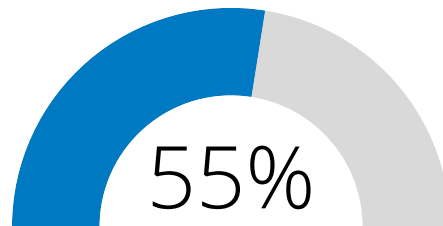


Overall scores for each of the 13 brands

# 01

## Commitment

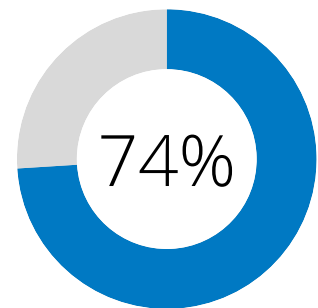
### DOES THE BRAND HAVE A COMPREHENSIVE COMMITMENT ON SUSTAINABLE SEAFOOD?



National Average

#### KPI 1.1: The brand has a publicly available commitment regarding environmentally sustainable seafood.

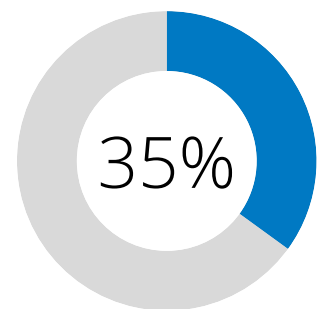
Clover Leaf, DOM and Rio Mare are the only three brands that received a perfect score under this KPI for having comprehensive commitments to sustainability that are supported by full chain traceability policies that trace at least the scientific name, geographic origin and gear type or farming method and have established timelines for achieving their commitments (or the commitment has already been met).



KPI 1.1: National Average

#### KPI 1.2: The brand has a publicly available commitment regarding socially responsible seafood.

None of the brands received a perfect score under this KPI because they do not report on the activities that they conduct to support their commitments to social responsibility. However, Rio Mare did report that it will be releasing the results of a human rights impact assessment of its supply chain and its next steps in relation to those results sometime in the next year. Rio Mare and Clover Leaf are the only two brands to achieve a score of 80 on this KPI for having commitments to social responsibility that reference credible standards, relay clear expectations of suppliers and are supported by a traceability policy.

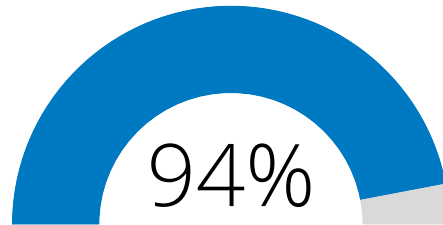


KPI 1.2: National Average

# 02

# Data Collection

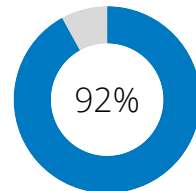
## IS THE BRAND COLLECTING DATA TO SUPPORT ITS COMMITMENT?



National Average

### KPI 2.1: The brand collects data on species scientific name.

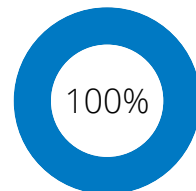
BlueWater Seafood is the only brand scoring "0" on this KPI because SeaChoice could not find evidence that it collects scientific name for any of its products and was not able to obtain this information through direct communication.



KPI 2.1: National Average

### KPI 2.2: The brand collects data on geographic origin.

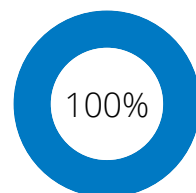
All brands are collecting data on geographic origin for all products they sell.



KPI 2.2: National Average

### KPI 2.3: The brand collects data on wild or farmed.

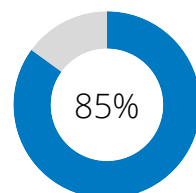
All brands are collecting data on whether wild or farmed for all products they sell.



KPI 2.3: National Average

### KPI 2.4: The brand collects data on gear type and farming method.

BlueWater Seafood and True North Seafood are the only two brands scoring "0" under this KPI because SeaChoice could not find evidence that they are collecting data on gear type or farming method for any products and was not able to obtain this information through direct communication.

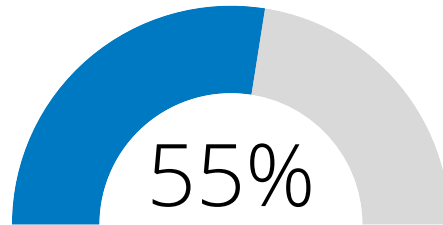


KPI 2.4: National Average

# 03

# Responsible Sourcing

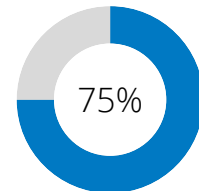
## IS THE BRAND MAKING RESPONSIBLE SOURCING DECISIONS?



National Average

### KPI 3.1: The brand publishes a clear hierarchy demonstrating its sourcing priorities.

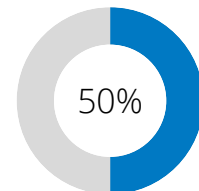
BlueWater, High Liner, Rio Mare, Ocean Brands and Janes all achieved perfect scores under this KPI because they have published clear hierarchies of sustainability standards demonstrating their sourcing priorities for all commodities they sell.



KPI 3.1: National Average

### KPI 3.2: The brand has reported on the percentage of seafood sold in the past year that meets its sustainability commitment by volume or value.

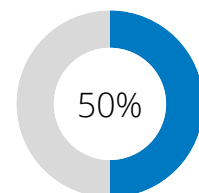
Of the eight brands that reported on the percentage of seafood sold by volume or value of sales in the last year that met their commitment, six of them did so for the first time following SeaChoice's guidance. Aqua Star, BlueWater, Ocean Brands, Olivia and True North did not report on the percentage of seafood sold in the last year that met their commitment.



KPI 3.2: National Average

### KPI 3.3: Suppliers are required to sign a code of conduct to uphold the brand's environmental sustainability commitment.

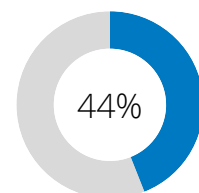
Clearwater, Clover Leaf, DOM and Rio Mare all achieved perfect scores under this KPI because they require suppliers to sign some form of agreement that covers all of their sustainability commitment and they actively verify that this commitment is being upheld.



KPI 3.3: National Average

### KPI 3.4: Suppliers are required to sign a code of conduct to uphold the brand's social responsibility commitment.

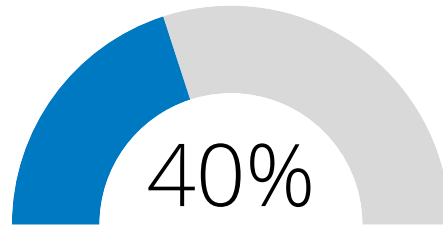
Clearwater and Rio Mare are the only two brands that achieved a perfect score under this KPI for having a code of conduct that covers their commitment to social responsibility and for actively verifying that these terms are being upheld on at least an annual basis.



KPI 3.4: National Average

# 04 Transparency

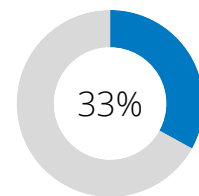
## IS THE BRAND TRANSPARENT ABOUT ITS COMMITMENT?



National Average

### KPI 4.1: The brand labels products with the information that allows consumers to make informed decisions.

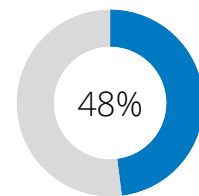
None of the brands achieved a perfect score under this KPI because they do not label all products with scientific name, geographic origin, wild or farmed and gear type or farming method. Rio Mare achieved the highest score under this KPI for applying the most KDEs to its labels and is the only brand that has made a public and time bound commitment to include all of these components on its labels.



KPI 4.1: National Average

### KPI 4.2: The brand follows best practice guidelines for making environmental claims on its products.

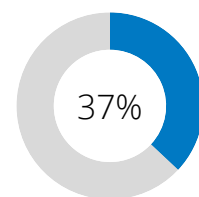
Janes is the only brand that achieved a perfect score under this KPI for only using credible certification claims on its product labels and making evidence publicly available to back up these claims. Aqua Star, BlueWater, Clearwater, Clover Leaf, DOM, High Liner, Ocean Brands, Rio Mare and True North all use self claims on their products which do not meet ISO standards and are not independently verified.



KPI 4.2: National Average

### KPI 4.3: Scientific name, geographic origin and harvest method of the brand's products is publicly available.

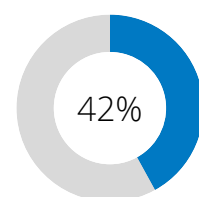
Ocean Brands and Clover Leaf are the only two brands to achieve a perfect score under this KPI for disclosing the scientific name, geographic origin and gear type or farming method on all products that they sell. High Liner achieved a score of 75 for disclosing the scientific name, geographic origin and gear type, but not the farming method, on all products it sells.



KPI 4.3: National Average

### KPI 4.4: The brand publicly reports how much of its seafood meets its sustainability criteria by volume or value of sales.

High Liner, Janes and Rio Mare achieved a perfect score under this KPI because they have reported publicly on the percentage of seafood sold by volume or value of sales that met their commitment for the past two consecutive years.

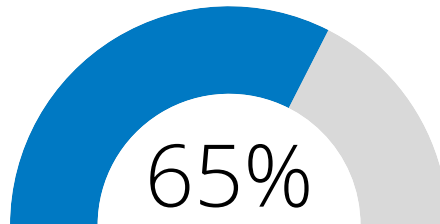


KPI 4.4: National Average

# 05

## Education

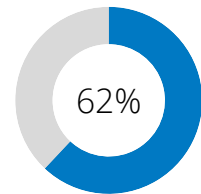
### DOES THE BRAND EDUCATE CONSUMERS AND SUPPLIERS ABOUT ITS SEAFOOD COMMITMENTS?



National Average

#### KPI 5.1: There is a description of the brand's commitments to sustainable and socially responsible seafood on its website.

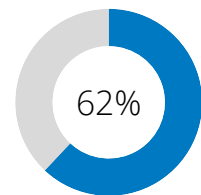
Clover Leaf, Ocean Brands and Rio Mare all achieved perfect scores under this KPI because their websites contain comprehensive descriptions of their commitments to sustainability and social responsibility. Additionally, SeaChoice commends Aqua Star, Clearwater, Clover Leaf, Export Packers, DOM, Ocean Brands and Toppits for adding clear commitment statements to their websites, following SeaChoice's guidance.



KPI 5.1: National Average

#### KPI 5.2: The brand has taken actions to ensure its suppliers are aware of its sustainable seafood commitment.

Clearwater, Clover Leaf, High Liner, Ocean Brands and Rio Mare all achieved perfect scores under this KPI for having clear strategies to engage with their suppliers and for providing them with direct support (e.g. training, resources) to help ensure all seafood products are sourced in line with their commitment.

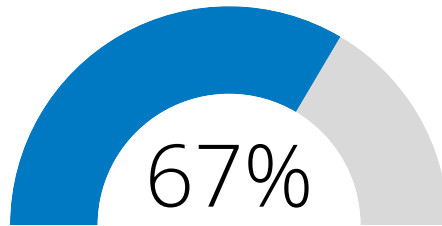


KPI 5.2: National Average

# 06

# Taking Initiative

## DOES THE BRAND TAKE ACTIONS TO SUPPORT IMPROVEMENTS TO FISHERIES AND AQUACULTURE?



National Average

Under Step 6, brands were only scored against the priority species that they sell. Their overall scores are based on the average across the KPIs that are applicable to them. For example, Export Packers does not sell farmed Atlantic salmon (KPI 6.1) or skipjack tuna KPI (6.3), so its average score under Step 6 is based on its scores under KPIs 6.2 (farmed shrimp and prawns) and 6.4 (other species).

The table below provides a visual representation of which brands sell which of the commodities called out under Step 6. Clearwater and Janes are the only two brands profiled on Seafood Progress that do not sell farmed Atlantic salmon, farmed shrimp and prawns or skipjack tuna and therefore are not scored under KPIs 6.1, 6.2 or 6.3. However, all brands were awarded a score under KPI 6.4 that reflects the actions they have taken in the past year to support improvements to any other species that they sell.

|                                   | Aqua Star | Blue Water | Clear water | Clover Leaf | Export Packers | DOM   | High Liner | Janes | Ocean Brands | Olivia | Rio Mare | Toppits | True North |
|-----------------------------------|-----------|------------|-------------|-------------|----------------|-------|------------|-------|--------------|--------|----------|---------|------------|
| KPI 6.1: Farmed Atlantic salmon   | Green     | Red        | Red         | Red         | Red            | Green | Green      | Red   | Red          | Green  | Green    | Green   | Green      |
| KPI 6.2: Farmed shrimp and prawns | Green     | Green      | Red         | Red         | Green          | Red   | Green      | Red   | Red          | Green  | Red      | Green   | Green      |
| KPI 6.3: Skipjack tuna            | Red       | Red        | Red         | Green       | Red            | Red   | Red        | Red   | Green        | Red    | Green    | Red     | Red        |

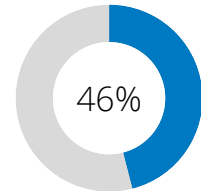
■ Brand does not sell this species      ■ Brand sells this species

# 06

# Taking Initiative

## KPI 6.1: The brand takes actions to support improvements to farmed Atlantic salmon.

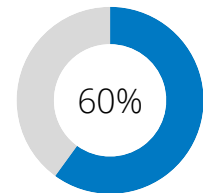
Aqua Star, DOM, High Liner, Olivia, Rio Mare, Toppits and True North all sell farmed Atlantic salmon. None of these brands achieved a perfect score under this KPI for only selling farmed Atlantic salmon products that are produced in a closed containment facility, certified by ASC, Recommended by Ocean Wise and/or rated Best Choice by Seafood Watch, or for taking action on all of the remaining criteria. However, DOM, High Liner, Olivia, Rio Mare and True North are all committed to not selling any farmed salmon that is genetically engineered or modified.



KPI 6.1: National Average

## KPI 6.2: The brand takes actions to support improvements to farmed shrimp and prawns.

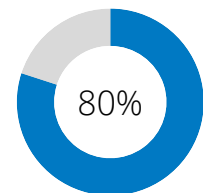
Aqua Star, BlueWater, Export Packers, High Liner, Olivia, Toppits and True North all sell farmed shrimp and/or prawns. Aqua Star, BlueWater and True North all achieved perfect scores under this KPI for only sourcing ASC certified and/or at least BAP 2 star plus certified farmed shrimp and prawns.



KPI 6.2: National Average

## KPI 6.3: The brand takes actions to support improvements to skipjack tuna.

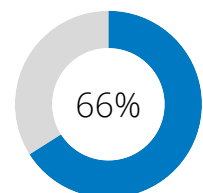
Clover Leaf, Ocean Brands and Rio Mare are the only three brands that sell skipjack tuna. While none of them achieved a perfect score under this KPI for only sourcing skipjack tuna products that are pole and line caught and MSC certified, Recommended by Ocean Wise and/or rated Best Choice by Seafood Watch, all of them achieved a score of 80 as a result of the other actions they are taking to support improvements to the management of this species.



KPI 6.3: National Average

## KPI 6.4: The brand takes actions to support improvements to other species.

Janes and DOM both achieved perfect scores under this KPI for only sourcing MSC certified versions of their wild products. Clearwater, Clover Leaf, and Ocean Brands also achieved perfect scores under this KPI for conducting outreach, collaborating with other companies pre-competitively, working with suppliers, preferentially sourcing from more sustainable sources and prioritizing sourcing highly traceable or socially responsible products.



KPI 6.4: National Average

# NEXT STEPS

As mid-supply chain actors, seafood brands play a critical role in driving improvements to fisheries and aquaculture practices in Canada upstream, as well as supplying downstream actors (such as retailers and foodservice) with the most environmentally sustainable and socially responsible products destined for consumers.

SeaChoice calls on seafood brands to make progress in the following areas in the coming year:

## **Environmental Sustainability**

Increase commitment ambition by covering all products that the brand sells and/or establishing a timeline for achieving 100% compliance. Additionally, those that currently rely solely on one-up, one-down traceability to support their commitments to sustainability should endeavor to expand this policy to full chain traceability.

## **Social Responsibility**

Make a commitment to social responsibility that is more ambitious, develop a clear and effective traceability policy to support the commitment, and begin to report on the activities that the company is conducting to support the commitment. This starts with developing a code of conduct that suppliers are required to abide by and that clearly reflects the company's commitment to social responsibility.

## **Transparency**

Report annually on the percentage of seafood sold by volume/value of sales that meets the commitment, establish a time bound commitment to add all (or at least more) essential information to product labels and begin taking action on this commitment, and begin publicly disclosing key source information on some or all products sold.