



10th ANNIVERSARY!



Annual Report

2017 · 2018

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PROTECTING OUR OCEANS

10th ANNIVERSARY!





The Ocean Industry Next Ten Years' Challenge: Sustainability and Proactive Conservation.

Twenty-six years ago, when I started working for the Earth Island Institute's Dolphin-Safe program and visiting tuna companies to have them join the project, some of the representatives I met looked at me as if I was coming from another world. For the first time someone was pushing them to consider their environmental impact and the impact of their supplying fleets.

In the Nineties and until the beginning of the new Millennium, no data was available about the state of the stocks and only few experts knew that fisheries captures had grown five-fold to reach a maximum. It was only with Internet and the development of certifications like Friend of the Sea that the fish industry and consumers became aware of the problem and the need to choose sustainable sourcing.

Ten years after, the seafood and omega3 industries have revolutionized their perception of aquatic resources. An impressive amount of companies has engaged to sustainable sourcing, while entire countries and international entities have introduced laws and regulation to have their fishing and aquaculture industries sustainable. Unfortunately, not all promises have been kept and green washing is still widespread. As a consequence, the marine habitat is still being overexploited in oceans, rivers and lakes; some tuna fishing fleets still kill dolphins; crews are still forced to stay years at sea, against International labour conventions and human rights. While some tangible conservation results have been achieved, some stocks recovering and some countries breaking down on slavery, our mission is still far from being accomplished.

*Paolo Bray, Founder and Chief Executive
Director of Friend of the Sea.*

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Sustainable Use of the Oceans: a Goal for the Future

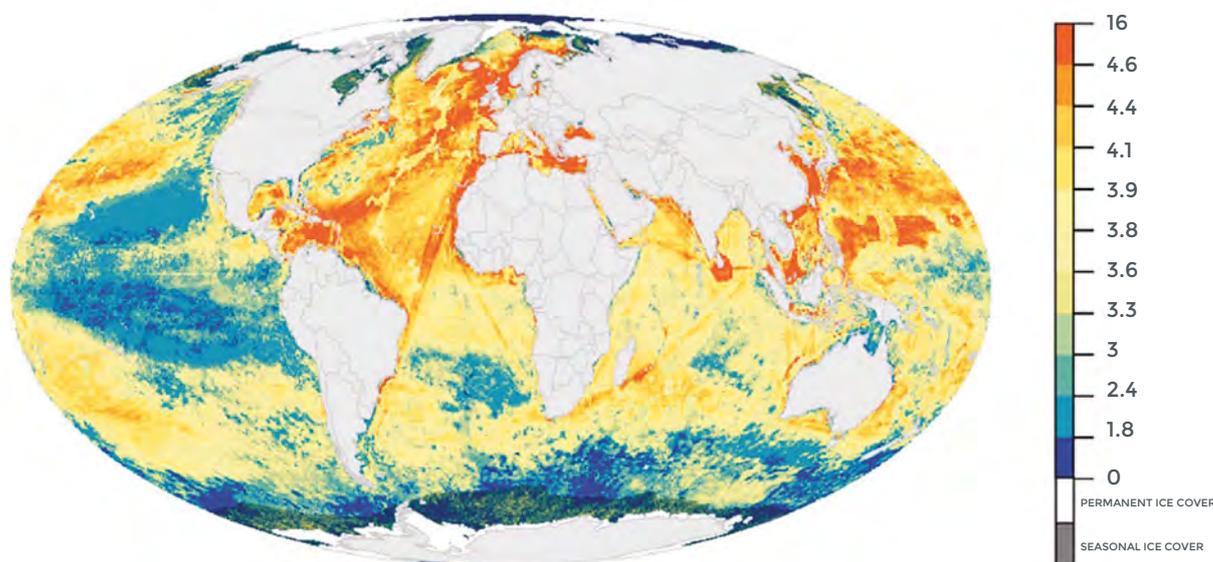
Every part of the global ocean presents a human influence and almost the entire ocean experiences multiple pressures.

Habitat destruction, over-fishing, pollution, maritime trade, ocean acidification: human pressures on the ocean have led to a serious decline in ocean health globally.

The population continues to grow and 60 percent lives in coastal areas. Increasing demand for seafood globally puts pressure on fish stocks, with an estimated 88 per cent of fish stocks being either fully exploited or overexploited. Aquaculture growth has compensated the demand for seafood but impacted habitats such as mangrove forests, wetlands and coastal waters.

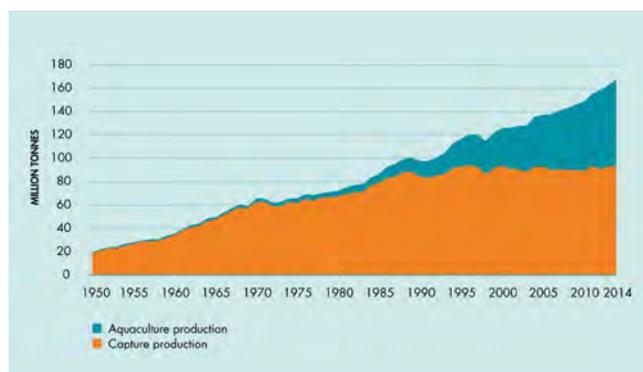
Around 80 per cent of the volume of international trade in goods is carried by sea, with impacts in terms of pollution and whales ship strikes. Oceans are polluted also by uncontrolled sewage from agricultural and urban origin.

Since 2008, Friend of the Sea works globally with states, the seafood and shipping industry, scientists, NGOs and the public to promote the sustainable use of the oceans and the conservation of the aquatic habitat, playing a fundamental role in the global sustainable movement.



A paper published in *Nature Communications* by Ocean Health Index's calculated and mapped changes in 20 marine ecosystem types globally over five years caused by 19 anthropogenic stressors. Nearly 66 percent of the ocean and 77 percent of national jurisdictions show increased human impact. Cumulative Impact scores for 2013 are shown above.

World Capture Fisheries and Aquaculture Production



Friend of the Sea's mission, in line with the United Nations 2020 Sustainable Development Goals, is to protect the ocean by means of promoting sustainable fisheries, aquaculture and shipping.



SUSTAINABLE DEVELOPMENT GOAL 14

Conserve and sustainably use the oceans, seas and marine resources for sustainable development

Sources

Halpern, Benjamin et al. (2015) "Spatial and temporal changes in cumulative human impacts on the world's ocean" *Nature Communications*

FAO. *The State of World Fisheries and Aquaculture 2016*

Pioneers of Independent Sustainability Certification

95% of the tuna industry participates in the Dolphin-Safe project which has saved millions of dolphins since 1991.



Friend of the Sea was started by Paolo Bray, the European Director of the Earth Island Institute Dolphin-Safe tuna project - the precursor of the sustainable seafood movement. Founded and managed by environmentalists, FOS is rightly perceived by the industry and NGOs as a truly independent program.



FOS is a Member Associate of FAO/INFOFISH and its criteria follow the UN FAO - Guidelines for the Eco-labelling of Fish and Fishery Products from Marine Capture Fisheries. In particular, only products from stocks which are not overexploited can be certified.



Affordable = Accessible

By reducing costs and making requirements simpler but still strict and verifiable, FOS is relatively more affordable and accessible. Up to 50% of the companies certified are small-scale producers. This is in line with the FAO's priority to ensure all players, big or small can apply for certification, particularly those from developing countries which constitute the bulk of seafood supply.

The Friend of the Sea logo and standard provide consumers with a guarantee for both wild-caught and farmed products.



Friend of the Sea hero stories

FOS is the only sustainable fisheries certification program recognized by an EU National Accreditation Body.



- A high level of **social accountability** is required, including a ban on child labor or forced labor and standards for worker's health and safety.
- **FOS chain of custody standard** is designed to ensure that certified seafood can be traced back to a sustainable and well managed source. DNA tests are carried out on a sample basis on certified products to monitor traceability.
- FOS certification requirements have been recognized as a **top performer** by several international benchmark studies. (Pew Charitable Trusts, Sea Ecology, Food & Water Watch, University of Tier/Froese and Proelss*).
- The **European Commission** lists Friend of the Sea among the main certification ecolabels for sustainable seafood in its "How do you choose your fish?" report.
- **FOS is the only seafood certification program** to be recognized by a member of the network of EU national accreditation bodies, Accredia.
- **Stakeholders** are an important part of the FOS project, ensuring diversity of opinion, perspective and approach.



Friend of the Sea Criteria

Sustainable products and their origins are audited onsite by independent certification bodies against FOS criteria.

Wild-caught Products

- TARGET STOCK NOT OVEREXPLOITED
- MAXIMUM 8% DISCARD OF BYCATCH
- NO BYCATCH OF ENDANGERED SPECIES
- NO IMPACT ON SEABED
- FUEL EFFICIENCY
- COMPLIANCE WITH REGULATION (TAC, NO IUU, ETC)
- SOCIAL ACCOUNTABILITY
- CHAIN OF CUSTODY
- SUSTAINABLE SHIPPING

Farmed Products

- FUEL EFFICIENCY
- NO IMPACT ON CRITICAL HABITAT (MANGROVES, WETLANDS, ETC)
- ESCAPES AND BYCATCH REDUCTION
- COMPLIANCE OF WATER QUALITY PARAMETERS
- NO GMO, NO GROWTH HORMONES
- SOCIAL ACCOUNTABILITY
- CHAIN OF CUSTODY
- SUSTAINABLE SHIPPING

Global Growth

770

COMPANIES NOW CERTIFIED UNDER FOS FROM FARMED AND WILD SOURCES

65

COUNTRIES

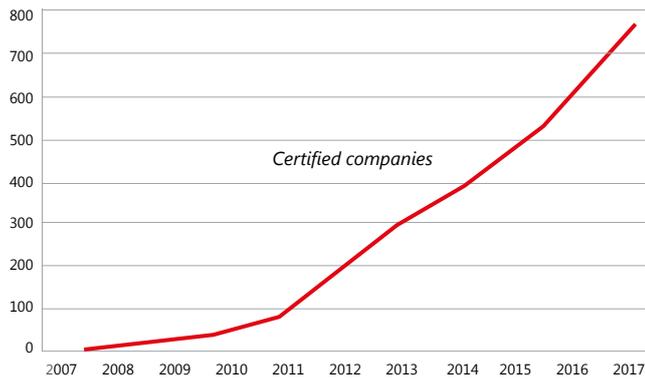


A WORLDWIDE PRESENCE

Consumers around the world have more choice than ever



FOS CERTIFIED COMPANIES GROWTH

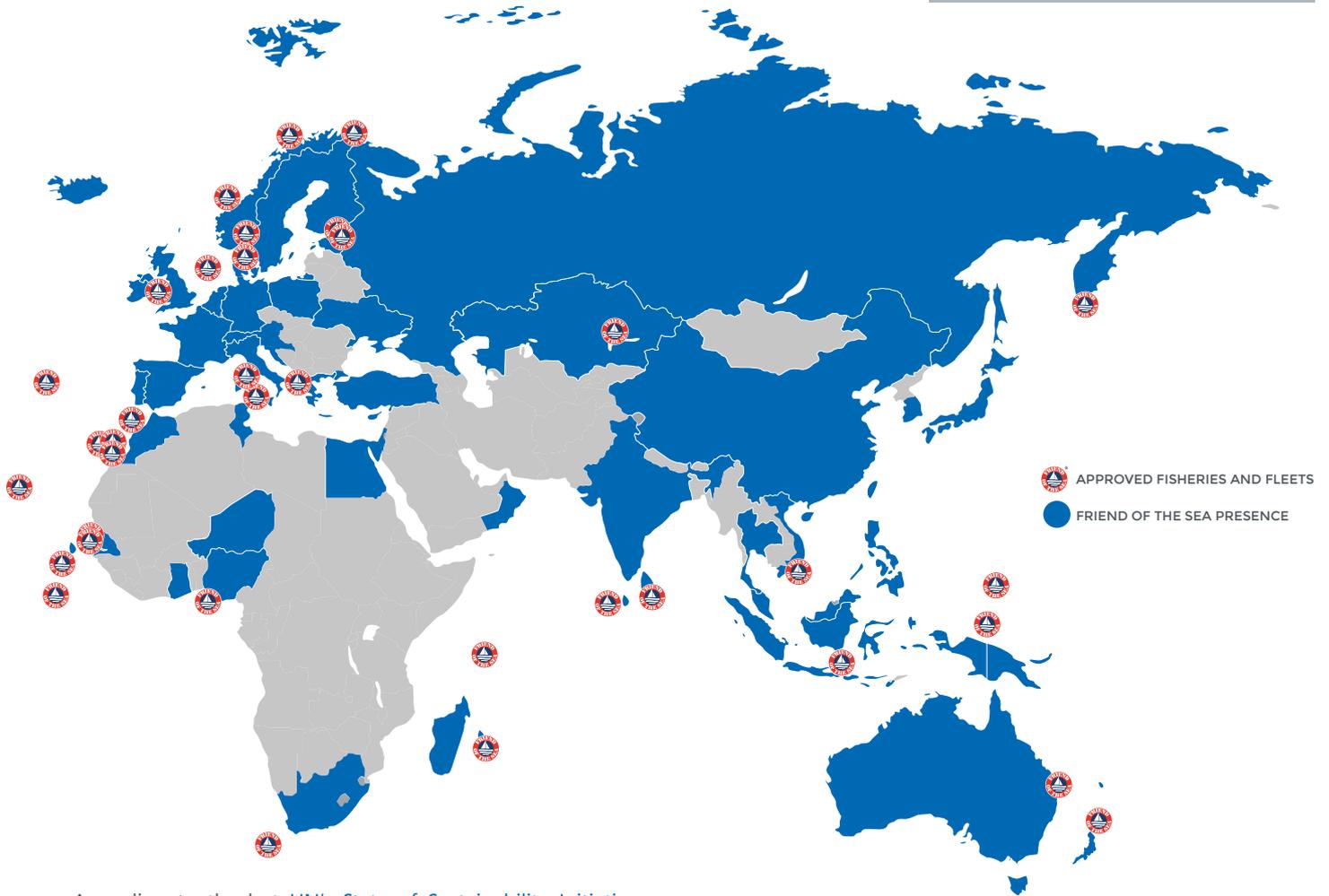


150
COMMERCIAL SPECIES

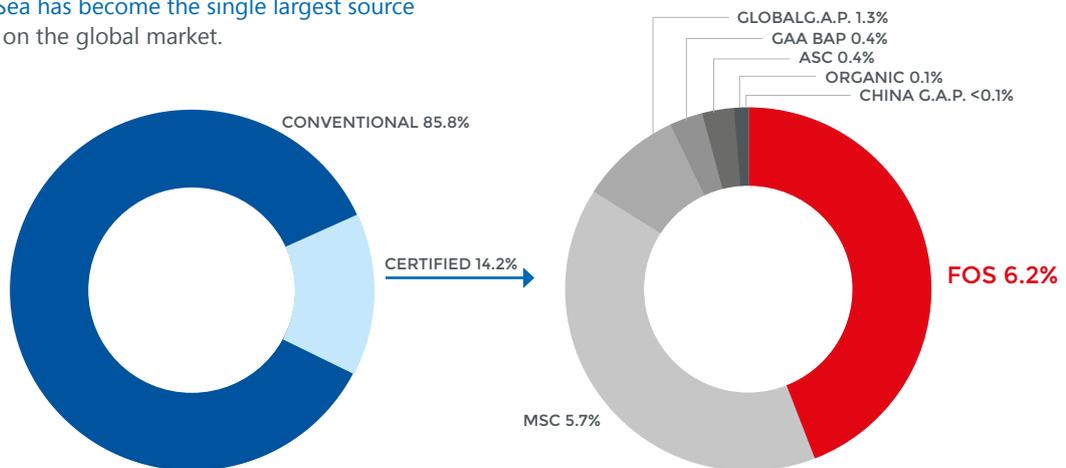
44
APPROVED FISHERIES AND FLEETS

3,000
PRODUCTS

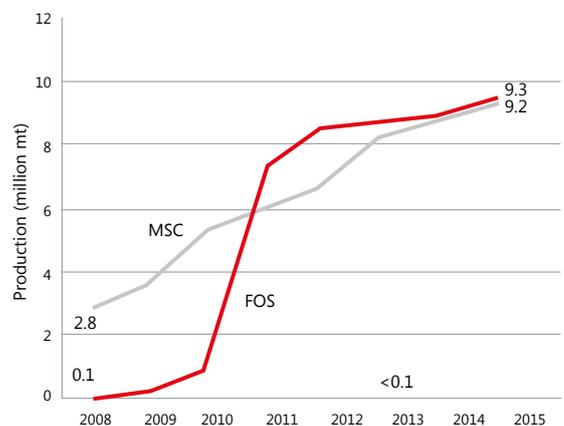




According to the last UN's State of Sustainability Initiatives Review, Friend of the Sea has become the single largest source of certified wild catch on the global market.



FOS production has grown at a rate of 91% per annum between 2008 and 2015, reaching 9.3 million metric tons of FOS-certified wild catch seafood in 2015 (5.7% of global, 10,1% of total wild catch) and making it the single largest source of certified wild catch on the global market.



Sources

State of Sustainability Initiatives Review: Standards and the Blue Economy, International Institute for Sustainable Development (IISD), 2016

Compound annual growth rates (2008–2015):
 FOS: 91 per cent; MSC: 18 per cent; Total: 1 per cent.
 Source: FAO Fishstat, 2015; FOS, MSC, personal communication, 2015.

Sustainable Omega-3

Friend of the Sea has become the leading international standard for producers of fish oil, fish meal and Omega-3 supplements.

421

COMPANIES HAVE RELIED ON FRIEND OF THE SEA'S ASSESSMENT TO VERIFY THE SUSTAINABLE ORIGIN OF THEIR PRODUCTS

32

COUNTRIES



Environmental sustainability is a relevant issue for the Omega-3 industry, faced with some consumers concerns. Friend of the Sea Omega3 producers verify their suppliers are listed as approved and thus implement sustainable fisheries practices. This way they can provide a third party assurance to consumers worldwide.

USA, Scandinavia, Central Europe and Australia are the markets with the highest presence of Friend of the Sea labelled Omega3 supplements. Antarctic krill, menhaden and the Peruvian anchovies' fisheries and fleets are approved according to Friend of the Sea sustainability requirements.



Some of Friend of the Sea certified Omega-3 products originate from selected seafood processing by-cuts or trimmings, thus optimizing use of marine resources and avoiding production of waste.



Aquaculture: Friend of the Sea Continuous Growth

The Friend of the Sea aquaculture requirements have been benchmarked as the strictest and best performing among international standards. Since the beginning they included also Social Accountability requirements, waste, water and energy management. All aspects of the production chain are included and have to be covered by an appropriate Chain of Custody: from broodstock to farming, harvesting and processing. Recently seaweeds standards and requirements for fishmeal from insects have also been introduced.

Covering 30 countries Friend of the Sea certified companies represent large and small scale producers and a wide range of species. FOS aquaculture standards cover a diversity of species, from Peruvian scallops to Adriatic sturgeon, both fresh and salt water.

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AQUACULTURE COMPANIES
CERTIFIED FRIEND OF THE SEA



Friend of the Sea Certified Aquaculture Species

<i>Acipenser baeri</i>	<i>Haliotis midae</i>	<i>Rachycentron canadum</i>
<i>Acipenser gueldenstaedtii</i>	<i>Huso huso</i>	<i>Salmo salar</i>
<i>Acipenser naccarii</i>	<i>Lates calcarifer</i>	<i>Salvelinus alpinus</i>
<i>Acipenser stellatus</i>	<i>Litopenaeus vannamei</i>	<i>Salvelinus fontinalis</i>
<i>Acipenser transmontanus</i>	<i>Meretrix meretrix</i>	<i>Scophthalmus maximus</i>
<i>Argopecten purpuratus</i>	<i>Mytilus chilensis</i>	<i>Seriola lalandi</i>
<i>Argyrosomus regius</i>	<i>Mytilus edulis</i>	<i>Solea senegalensis</i>
<i>Crassostrea gigas</i>	<i>Mytilus galloprovincialis</i>	<i>Sparus aurata</i>
<i>Dicentrarchus labrax</i>	<i>Oncorhynchus mykiss</i>	<i>Thunnus maccoyii</i>
<i>Diplodus puntazzo</i>	<i>Penaeus monodon</i>	

Fish Welfare: The New Challenge

Friend of the Sea and fair-fish international association have been awarded a grant from the Open Philanthropy Project to promote animal welfare principles among Friend of the Sea's aquaculture certified companies.

As part of the two-years project, the FishEthoBase-research team of fair-fish international will assess the welfare of fish on most of Friend of the Sea's aquaculture certified companies by direct observation of their current practices. Findings from these assessments will then be used to create farm-specific improvement recommendations and to develop animal welfare criteria for possible inclusion in Friend of the Sea's standards. Additionally, Friend of the Sea and fair-fish plan to share their research through formal presentations at academic and industry conferences.

New Friend of the Sea Fish welfare standards to be introduced, following results from the major international study carried out by FOS on Fish Welfare.

Aquaculture sector's contribution to the supply of seafood for human consumption overtook that of wild-caught fish

Friend of the Sea Widens the Scope of its Certifications

New standards on Shipping, Whale and Dolphin-Watching, Ornamental Fish, Seaweeds, Insects fishfeed and UV Creams increase Friend of the Sea conservation results and visibility.

In line with Friend of the Sea's mission to promote sustainable practices and reduce anthropic impact on the oceans, 6 new certification standards have been introduced - all a first of their kind.

Safe Sea Jellyfish Sting Protective Lotion is Friend of the Sea certified



Whale watching

Whale and Dolphin watching represents an important contribution to the economy of many countries in the developed and developing world. It consists of boat trips to see a range of marine life including cetaceans, seals, birds and sharks. The rapid growth of the number of whale watching operators is known to potentially change marine mammals' behaviour, migratory patterns and breathing cycles. Friend of the Sea standard supports operators to assess threats and to promote best practices.



Shipping

With 90% of the world's international trade travelling by sea, and the industry accounting for 3 to 4% of global CO₂ emissions, shipping has the potential to reduce its environmental impact. FOS has developed a new certification, with the aim to increase the responsible practices of the shipping industry. The criteria included in the certification scheme range from pollution prevention to fuel efficiency, from waste management to social accountability.



Ornamental Species

Ornamental fish are tropical marine species kept in home and public aquaria and include fish, corals, crustaceans, mollusks and live rock. Friend of the Sea sustainability certification of ornamental fish products makes consumers aware about conservation measures undertaken by suppliers to reduce their potential environmental impact.



Seaweeds

Seaweeds are an important component of the oceans and deserve attention and protection. More than 95 percent of global seaweed production is farmed. Several studies have highlighted how small scale seaweed farming can provide social and economic benefits to local communities and at the same time have a positive impact in terms of carbon footprint. Friend of the Sea requirements aim to promote those farms having a sustainable environmental and social impact.



Fishfeed from farmed insects

Some companies have developed new kinds of feed for aquaculture farms that could help the environment: they have developed fishfeed which are based on insects. In order to promote and monitor this new solution, Friend of the Sea has launched new sustainability requirements.

Stronger Awareness for Sustainable Seafood

From digital tools to educational activities and instore promotion, Friend of the Sea has been working with partners to raise the awareness of responsible consumers on oceans conservation and the beneficial effects of a sustainable choice.



Building Global Relations

Friend of the Sea promotes its certified products across the world by hosting events, attending conferences and building support through an ever growing range of networking platforms. One to One meetings have been held in Venice, Milan and Bangkok. Representatives of major retailers and catering chains have had the chance to meet Friend of the Sea certified international seafood suppliers from around the world.



Engaging Consumers in Store

Through their ability to influence consumers at point of sale, retailers play a vital role in promoting the Friend of the Sea ecolabel. Partnerships with retailers who share Friend of the Sea's mission and the presence of products in stores are an important incentive for fisheries and aquaculture producers to become FOS certified.



School Awareness Days Hong Kong - Switzerland - Italy

Since 2015 FOS organized a series of awareness days at different schools and grades around the world. Thousands of students have been introduced to the world of fishing and aquaculture through key topics of biodiversity, overfishing, sustainable fishing methods and aquaculture techniques, and the responsibility of consumers. Lessons included interactive videos, multiple choice and role-playing games.

At the end of the day, informative material and gadgets are distributed to the students so that they can spread the message among their friends and families.

Friend of the Sea Conservation Projects and Campaigns

As an NGO with a mission to conserve the marine environment, FOS has donated, over the years, a significant part of its revenue to selected conservation initiatives. More recently it has developed its own projects and campaigns to save endangered species.



Sturgeon Rescued from Extinction

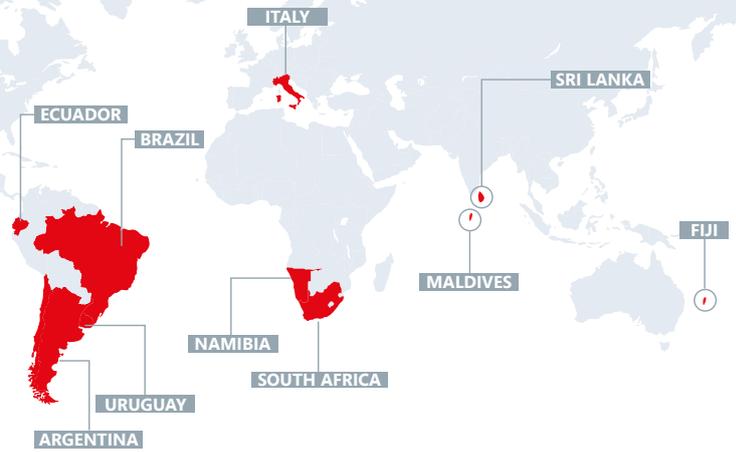
In recent decades, the anthropization of rivers, pollution and illegal fishing have threatened the existence of sturgeons worldwide. Most species are critically endangered or of extinction. Friend of the Sea supports and participates, in collaboration with the *Italian Sport Fishing Association (FIPSAS)*, in a project to recover the Adriatic Sturgeon from extinction. Over 15,000 micro-chipped sturgeons, from the Friend of the Sea certified caviar company *Storione Ticino*, have been introduced into the main rivers in Northern Italy. Reports of sighting of juveniles from reproduction in the wild confirm the success of the project. Friend of the Sea has produced a professional documentary available on FOS Youtube page.



Save the Whales from Ship-strikes Campaign

In 2015 Friend of the Sea launched a campaign focusing on the increasing numbers of whales being killed or affected by ship strikes.

Pigmy blue whales and other whales feed and breed in the area of the Indian Ocean just south of Sri Lanka. The same area is the location of some of the busiest cargo ship traffic in the world. Aside from the potential lethal strikes, the "wall of noise" ships create negatively impacts on whales feeding and breeding behaviour. Friend of the Sea has urged the World Shipping Council and the Sri Lankan Government to submit a proposal to the International Maritime Organisation to shift the shipping lanes 15 miles south, thus reducing the risk of strikes by 94%. Additionally Friend of the Sea has proposed the WSC a global project to assess similar risks and introduce impact reduction measures.



Friend of the Sea Supports and Donates to the Following Selected Conservation Projects

Whale Shark Conservation in the Maldives

The Maldives Whale Shark Research Program (MWSRP), a research based conservation charity dedicated to whale shark studies and fostering community-focused conservation initiatives in the Maldives and the greater Indian Ocean.



Reef Propagation in Fiji

The Aquaculture Development for the Environment Organisation (ADE), a non-profit organisation that develops coral reef conservation and research projects in Fiji, such as reef rehabilitation with the involvement of the local community.



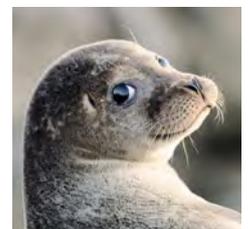
RSPB Save the Albatross

Save the Albatross, a global campaign of the Royal Society for the Protection of Birds achieves tangible results in the conservation of these endangered sea birds. The project educates fishermen and the industry stakeholders in seven seabird bycatch hotspots worldwide, including Argentina, Brazil, Chile, Ecuador, Namibia, South Africa, Uruguay.

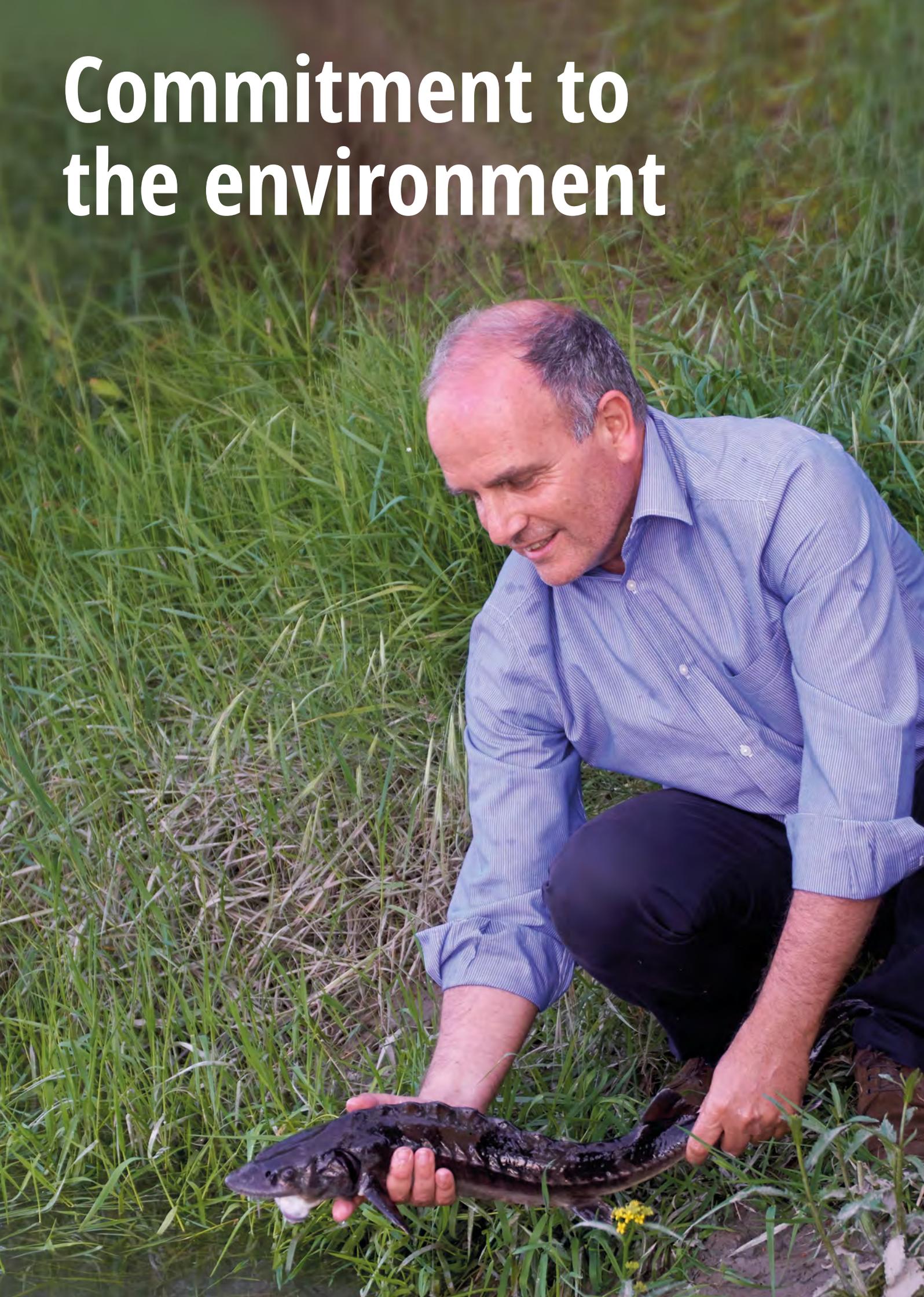


Monk Seal Project in Italy

LIPU (Italian major birds' conservation organization) has developed a project for the protection and conservation of habitats in the Venice lagoon hosting monk seal and marine birds.



Commitment to the environment



Friend of the Sea on the International Media



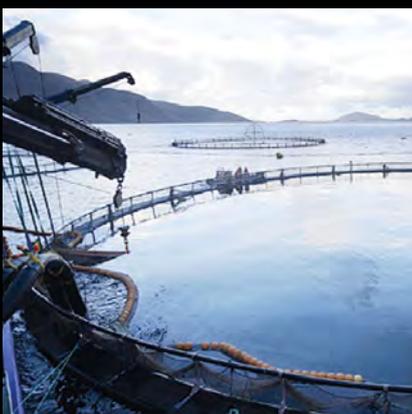


Why choose Friend of the Sea certification?

- . Experience – 30 years in the sustainable seafood certification arena
- . Independence from industry
- . One logo for aquaculture, fisheries, omega3 and now shipping and more
- . Recognized by National Accreditation Bodies
- . Third party audit by independent certification bodies
- . Strict but swift audit process
- . Accessible also to small scale companies
- . Includes Social Accountability
- . Supports conservation projects and awareness initiatives

What are the benefits of Friend of the Sea certification?

- . Confirm, highlight and promote your engagement to marine habitat conservation
- . Contribute to marine conservation by supporting Friend of the Sea
- . Have your certification promoted on the media
- . Attract responsible consumers
- . Access new markets
- . Participate to networking events
- . Joint marketing with FOS





A Healthy Growth

Our financial year results for 2017 reflect the growth of Friend of the Sea and Friend of the Earth. By means of a cautious and effective use of resources, Friend of the Sea's revenues of € 1.131.000 were more than adequate to meet costs of € 1.041.000.

Revenues originate mainly from royalties to use the registered Friend of the Sea (and Friend of the Earth) logo and partly by donations from foundations. Friend of the Sea marketing costs are mainly directed towards awareness programmes and conservation projects.



SUSTAINABLE
FISHING



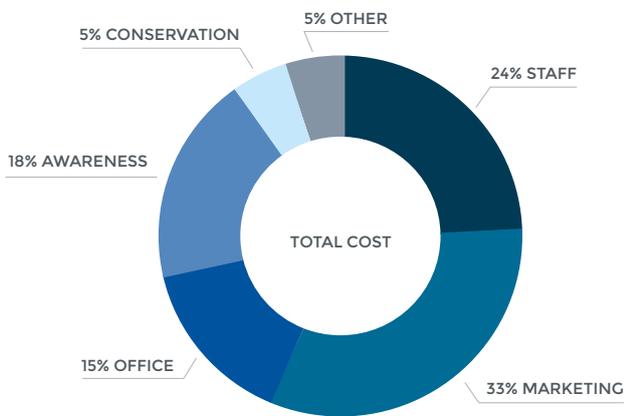
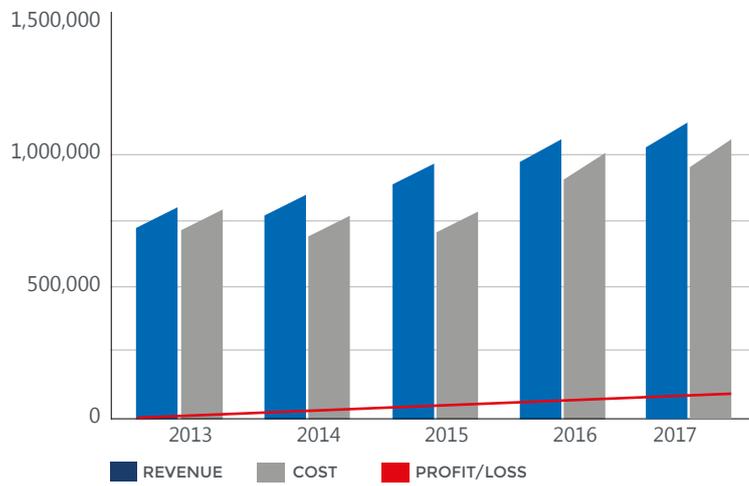
SUSTAINABLE
AGRICULTURE



SUSTAINABLE
AQUACULTURE



SUSTAINABLE
FARMING





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**PROTECTING
OUR PLANET**



Friend of the Earth: a Must for the Future

Friend of the Earth is an International Certification Program for products from sustainable agriculture and farming.

Its mission is to promote sustainable agricultural practices by means of certification and consumer awareness.

The exponential increase of the global population and growth in food demanding, can potentially cause significant environmental impacts if sustainable agricultural practices are not properly followed.



SOIL erosion, soil sealing, contamination by harmful substances, compaction, desertification.

WATER pollution by harmful substances, eutrophication and overexploitation. Agriculture accounts for 70% of the world's water usage.

BIODIVERSITY loss, ecosystem degradation, endangered species.

CLIMATE change, GHG emissions, in particular carbon dioxide and methane.

It is clear that sustainable practices of agriculture and farming have to take the lead to ensure meeting future demands on agricultural and farming production.

With clear standards and a rigorous third-party audit, Friend of the Earth certification is a credible and effective way for farmers and food companies to demonstrate their commitment to sustainable management practices.



The Friend of the Earth logo and standard provide consumers with a guarantee for both agricultural and farmed products.



Friend of the Earth heroine stories



Friend of the Earth Criteria

The certification standard has been developed based on the FAO's SAFA (Sustainability Assessment of Food and Agriculture Systems) guidelines. Its principles are based on:

Agricultural and Farming Products

- THE PRESERVATION AND PROTECTION OF THE ECOSYSTEM
- USE OF INTEGRATED PEST MANAGEMENT PRACTICES
- IMPROVED ENERGY EFFICIENCY
- RESOURCE OPTIMIZATION
- REGULATORY COMPLIANCE
- CORPORATE SOCIAL RESPONSIBILITY
- CHAIN OF CUSTODY

Companies Supplying Friend of the Earth Certified Products



CERTIFIED COMPANIES



FRIEND OF THE EARTH PRESENCE



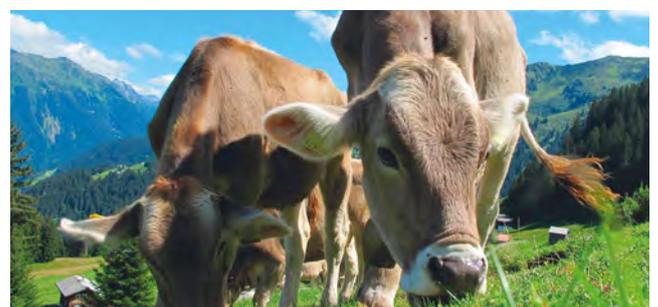
Roi Oil is Friend of the Earth certified



Friend of the Earth is growing rapidly, and it aims to become the main International Certification Program for sustainable agricultural production.

At the end of 2017, Friend of the Earth had more than 20 certified companies based in Italy, Costa Rica, France, Greece, Ecuador, Peru, South Africa, Sri Lanka, Turkey and USA.

Friend of the Earth promotes, throughout its certification standards, the “best practices” for sustainable farming.



Parmigiano Reggiano Antica Latteria Ducale is Friend of the Earth certified

Friend of the Earth Conservation Projects

In 2016 Friend of the Earth launched two important conservation projects in line with its mission to protect endangered species and habitats.



Save the Butterflies

Friend of the Earth in collaboration with *Polyxena Association*, started the "Save the Butterflies" project.

Italy is the European country with the highest number of different butterfly species (as reported by the international "Red List IUCN", Italy hosts 60% of all butterfly species in Europe), some of which (about 4%) are however endangered due to habitat destruction, intensive agriculture and climate change.

The project consists in protecting some of the most vulnerable butterfly species by *ex-situ* reproduction and consequent release in controlled and protected habitat. The *ex-situ* reproduction is carried out in *Polyxena's* butterfly house, inside the botanical garden "Lama degli Ulivi" in Monopoli (Bari – Italy), where the butterflies' entire life cycle is reproduced: from eggs laying on plants to the fluttering and releasing in nature.

Citizens are also involved into several "science activities" and can participate actively during the butterflies' releasing and the monitoring process.

Since the official opening in June, "Farfalia" house hosted several species, of which: *Zerynthia cassandra*, *Melanargia arge*, *Hipparchia sborodonii* and *Charaxes jasius*.

Friend of the Earth hopes this will be just an initial initiative of this kind to be duplicated in other areas and countries.



Snails Conservation Projects

In conjunction to the Butterflies Conservation Project, Friend of the Earth initiated another animal species protection project: the "Italian Snail Conservation Project" in Tuscany (Italy).

From the priority list of species and habitat that must be protected in the Tuscany region (reported by the international "Red List IUCN" and "Habitat"), the *Melanopsis etrusca* and *Xerosecta giustii* had been identified for protection.

As a matter of facts, the project consists of both administrative actions and conservation interventions, respectively directed to protect and preserve natural habitat species, reducing the risk of extinction of these little mollusks – which are very precious for the continuity of planet biodiversity.

The collaboration of the Museum of the natural History of Florence University, world experts and other National and International Museums, made possible carrying out the *ex-situ* breeding, a controlled releasing and the environmental awareness.

Friend of the Earth is committed to increase its conservation initiatives in the following years, as part of its efforts to protect the environment and make the public aware.



Friend of the Earth Media Coverage

