



SOUTH AFRICA

FRAGILE WATERS RESILIENT FUTURES

WWF-SASSI RETAILER/SUPPLIER PARTICIPATION
SCHEME REPORT 2024

About this report

This tenth edition of the WWF-SASSI Retailer/Supplier Participation Scheme report celebrates WWF-SASSI's 20th anniversary by showcasing the leading seafood sellers in South Africa who are committed to a sustainable supply chain. It highlights the urgency of adopting an ecosystems approach to fisheries management and is a call to action for retailers to join forces for sustainable and responsible sourcing of seafood products.

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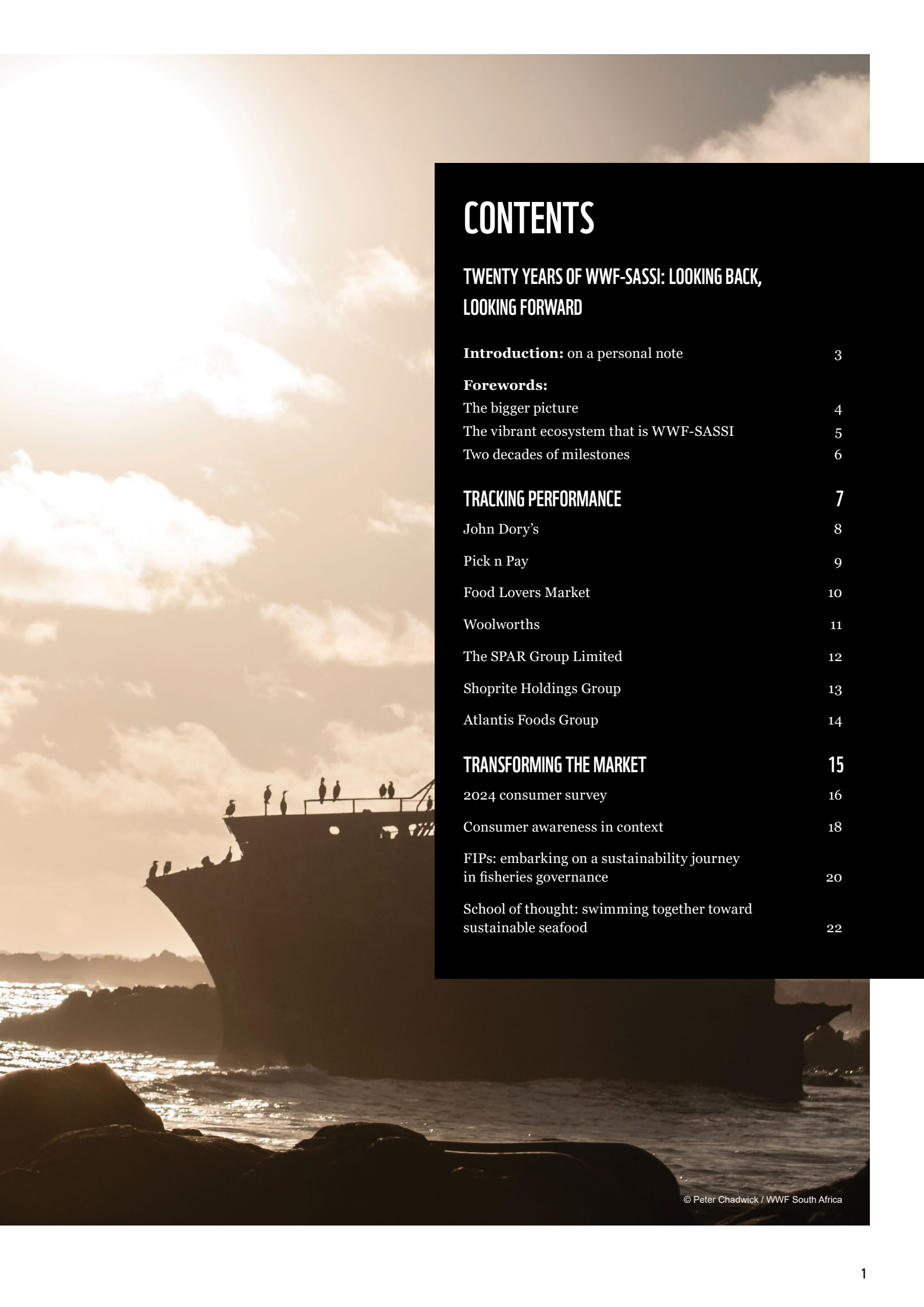
This report is available online at:

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WWF is one of the world's largest and most respected independent conservation organisations, with over 6 million supporters and a global network active in more than 100 countries. WWF's mission is to stop the degradation of the Earth's natural environment and to build a future in which humans live in harmony with nature. It aims to do this by conserving the world's biological diversity, ensuring that the use of renewable natural resources is sustainable, and promoting the reduction of pollution and wasteful consumption. WWF South Africa is a national office in the global WWF network. Started in South Africa in 1968, we are a local NGO with a vision of building a sustainable and equitable future in which humans and nature thrive. We work to champion the Earth's capacity to provide a source of inspiration, sustainable food, fresh water and clean energy for all. For Nature. For You.

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SETTING THE STANDARD

Working together as a collective can shift the industry to make sustainably and responsibly sourced seafood the norm and standard - and it is needed now more than ever. WWF-SASSI Participants are amongst those who can transform their supply chains and influence positive change in the seafood sector.



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ON A PERSONAL NOTE

After 10 years of working and living abroad, I returned to WWF in April 2024, and it is wonderful to reflect on the 20th anniversary of WWF's Southern African Sustainable Seafood Initiative (WWF-SASSI), where my journey with the organisation first began. After being hired by WWF as its first Marine Programme manager in 2003, WWF-SASSI was the first project that I helped develop for funding support.

I remember first hearing about the mythical and mystical Dr Kerry Sink. She had started a consumer awareness initiative called the Sustainable Seafood Initiative. Immediately I realised that this was exactly what was needed to complement the thinly stretched compliance efforts across South Africa's 3 000 km coastline.

Intrigued by the courage and audacity of someone starting a project of this ambition with virtually no financial or human resources, I was excited to hear the thoughts of the audacious Kerry Sink. Our first call, I remember now with amusement, was somewhat perplexing. All Kerry wanted to talk about were Coelacanths, which related to her new day-job at the time. After patiently listening to the plight of these deep-sea "living fossils", I finally built up the courage to tell Kerry that I had actually called about her other and more part-time project: The Sustainable Seafood Initiative. In retrospect, Kerry's presumption that someone calling from WWF would only want to speak about rare and endangered species, was not that crazy.

But as it turns out, this phone call was the start of one of the most productive and fun collaborations and friendships of my professional career. Soon we raised funds, hired capacity and started mobilising consumers, along with retailers and the fishing industry, to leverage change across the seafood supply chain. This was the start of an exciting new direction for WWF of working more systemically on the drivers of impacts. And today I am immensely proud of what WWF-SASSI has achieved in these 20 years.

Over the last two decades, it has assessed over 2 800 species, trained over 5 000 chefs and restaurant staff, partnered with South Africa's top five major retailers, developed tools such as the WWF-SASSI app equipped with the FishID, and empowered South Africans to make informed, sustainable seafood choices to support healthier marine ecosystems.

What about the next 20 years?

WWF-SASSI has proved its power and effectiveness in what it does, but our marine resources are far from secure, and we need much stronger complementary management measures. We need to keep our eye on the prize. In particular, the ecosystem approach towards fisheries. If we are to have any chance of securing the amazing diversity of our coastline, including our highly endangered African penguins, we will need to come back to this approach.

Over the last 20 years, it has been proven what is possible when working as a collective across a supply chain alongside WWF-SASSI, but right now we are just scratching the surface. We should see WWF-SASSI as a stepping stone towards an even grander vision of working more broadly with the retail sector. We should aim for halving the footprint of the average shopping basket. Let the next 20 years be a testament to what we can do together as a collective.

I would like to pay tribute to all of you who have made WWF-SASSI the success it is. This is truly a team effort, I thank you and here is to many more years charting the waves of change!

Deon Nel

Head of Environmental Programme,
WWF South Africa

THE BIGGER PICTURE

‘A system in peril.’ This is how WWF’s 2024 Living Planet Report describes the state of our planet. Biodiversity sustains human life and is the backbone of our survival. However, global indicators show that the state of nature on a global scale needs urgent intervention.

In 2015, nations worldwide set ambitious goals: halt and reverse biodiversity loss, keep global temperature rise below two degrees and reduce poverty by meeting people’s needs via sustainable practices and fair benefit distribution by 2030. Yet, as 2030 approaches, we are falling short. Many targets based on the 2015 baseline have stalled or even worsened.

SEAFOOD CONSUMPTION ON THE RISE

Seafood, which provides 17% animal protein globally, is a dietary staple in many countries. Each year, approximately 90 million tonnes of seafood are harvested from wild fisheries, and a further 100 million tonnes are produced through aquaculture. Over 3 billion people are highly to moderately dependent on seafood for nutrition and in 2024, the global seafood market was valued at around R37tn (\$110bn).

Driven by tourism, hospitality, increasing dietary aspirations and growing nutritional awareness, demand for seafood is rising. In South Africa, the seafood market reached R57.7bn (\$3.13bn) in 2024 and is expected to grow. South Africa accounted for 1.7% of the global fresh fish market and is projected to lead Africa in seafood revenue by 2030. National seafood consumption increased from 13.9 million in 2022 to 16.7 million in 2025, with South Africans eating seafood on average more than four times per month.

Traditional dishes like dried bakkoms, Easter pickled fish, fish breyani, salted seafood, traditional fish and chips and grilled snoek reflect seafood’s cultural significance in South Africa. Since Covid-19, the local fish market has grown, with renewed interest in cooking and in premium seafood among lower-income groups.

THE CHALLENGES

Sadly, we are nearing a tipping point in marine ecosystems, with mass coral die-offs and most fisheries (>89%) being overexploited or close to collapse. The crisis is complex as we face challenges such as overfishing, illegal, unregulated and unreported catches, declining fish stocks, pollution, infrastructure limitations and economic volatility amidst social crises like food insecurity, poverty and livelihood instability.

HOPE FOR SUSTAINABLE SEAFOOD

Despite this, prospects for sustainable seafood production remain strong. Retailers shape market trends and drive consumer choices. For 17 years, WWF-SASSI has partnered with major South African suppliers and retailers through the Retailer/Supplier Participation Scheme (RSPS), aiming for responsibly sourced seafood. Efficient traceability systems can foster accountability and drive sustainable and responsible practices by all actors in the seafood supply chain. Collective action coupled with bold leadership is now essential. WWF-SASSI and its partners remain committed to sustainability, believing that working together is our best hope to shift the tide before 2030.

Justin Smith

(Former) Head of Business Development
WWF South Africa

A heartfelt thank you to Justin Smith, WWF’s former Head of Business Development for eight years. Your leadership and support meant the world to us. Wishing you all the best on your next chapter. You will be deeply missed.

**BETWEEN
1970 AND
2020, MARINE
WILDLIFE
POPULATIONS
SHRANK BY**

56%

**THE GLOBAL
LIVING PLANET
INDEX 2024
REPORTS
MARINE
BIODIVERSITY
DECLINING BY**

**1.6%
ANNUALLY.**

THE VIBRANT ECOSYSTEM THAT IS WWF-SASSI

WWF-SASSI launched 20 years ago with a bold ambition: to raise consumer awareness about seafood sustainability when few retailers or suppliers were stepping up.

In 2011, the RSPS took shape when one of South Africa's largest retailers became the first on the continent to publicly commit to transforming its seafood supply chain by signing the Seafood Charter. By 2016, six more participants had fulfilled their RSPS commitments, laying a solid foundation for sustainable seafood sourcing in South Africa.

Since then, our RSPS participants' journey has gone from strength to strength, showing demonstrable increases in traceability, transparency and seafood labelling. There has been an emphasis on procuring responsibly sourced seafood products, seafood species that are certified, and sourcing from Fisheries Under Improvement Projects (FIPs). Our participants have not only invested in building resilience in their seafood supply chains but have also supported FIPs that promote responsible fishing practices. These include improved bycatch management and efforts to reduce ecosystem impacts, so that market availability is enhanced.

In 2017, the WWF-SASSI RSPS outlined a strategic plan to develop a collective approach by 2025. This approach recognises that systemic change requires coordinated action across the industry. With all hands on deck, this approach began to gather momentum and then, in 2020, the global pandemic both challenged and escalated those efforts. It shone a light on the importance of sustainability, but also disrupted supply chains, reduced seafood volumes and put a halt to international trade. These proved to be major challenges, but the industry demonstrated resilience. Many retailers maintained or increased their commitment to sustainable sourcing with a renewed understanding and effort in supporting and strengthening local supply chains and fisheries. Between 2020 and 2021, over 65% of the seafood sold by participating retailers was responsibly sourced, despite market volatility and economic instability.

South Africa's seafood consumption has continued to grow, with figures rising from approximately 325 000 tonnes in 2022 to an estimated 350 000 tonnes in 2024. This increase reflects a rising awareness and demand for seafood, with many consumers now engaging in regular consumption,

more than four times per month on average. The demand for seafood (wild caught in particular) remains popular due to perceptions of superior quality, lower carbon footprints, health benefits and natural sourcing, often associated with richer flavours and authenticity. These perceptions are influencing market demand.

But where do consumers sit in this value chain? The 2024 WWF-SASSI consumer survey showed that consumer awareness of seafood sustainability is still evolving but growing. We have seen an increase in awareness from 47% in 2021/2 to 52% in 2024, of which 80% of the 52% claim that they make informed seafood purchases. However, many consumers believe retailers and suppliers should lead on responsible sourcing and shifting the market to be more sustainable, underscoring the need for greater consumer-retailer engagement.

While current efforts of retailers and suppliers to facilitate behavioural change are recognised and appreciated, the goal now is to escalate these efforts further to train staff, improve on-pack labelling, ensure traceable systems are in place, and provide consumers with better information to support informed decision making.

Where to from here? Looking ahead, several key trends are expected to shape the future of seafood sustainability. These include the potential impacts of climate change on fish stock availability, evolving trade policies affecting import-export dynamics, increasing consumer appetites for seafood, and technological advancements in sustainable aquaculture. Addressing these challenges requires a collaborative effort across the entire value chain including all stakeholders, from fisheries and scientists to retailers and consumers, forming a "resilient ecosystem" dedicated to marine conservation.

The vibrant and complex ecosystem that is the WWF-SASSI programme underscores the collective responsibility of everyone involved in the seafood supply chain. By working together, we can conserve our oceans to safeguard the sustainability of marine resources for future generations.

Pavitray Pillay

Corporate Engagement and Behaviour Change Lead &
Head of Business Development
WWF South Africa

TWO DECADES OF MILESTONES

2002-2005

Dr Kerry Sink's research exposed concerning seafood trade trends. WWF South Africa initiated WWF-SASSI with government support and WWF Nedbank Green Trust funding. A national coordinator and species list were established. By 2005, public education through a consumer outreach programme began.

2011-2014

Retailers like I&J and Food Lover's Market joined and made public sustainable seafood commitments. The first WWF-SASSI Sustainable Seafood Symposium was held. National standards for seafood names were proposed. By 2014, major retailers published commitments and progress reports. The "Boat to Plate" and "10 Years of WWF-SASSI" reports were released.

2018-2020

WWF-SASSI contributes to SANS1647 (seafood labelling standard). Mixed sustainability trends noted with species moving between categories. WWF took legal action for West Coast rock lobster. By 2020, over 20 companies and 1000 individuals had completed WWF-SASSI training.

2023

WWF-SASSI published work on human dimensions in fisheries assessments and launched the Green Philosophy Plate Award with JHP Gourmet Guide™.

2007-2010

WWF-SASSI merged with the Responsible Fisheries Programme, forming WWF's Sustainable Fisheries Programme. WWF-SASSI RSPS launched in 2008, with Pick n Pay and Woolworths joining. John Dory's, SPAR and Ocean Basket followed in 2010. Pick n Pay began funding a Fisheries Improvement Project (FIP).

2015-2017

Retailer efforts contributed to the Marine Stewardship Council (MSC) certification of Namibian Hake. Species like Cape Bream and Kingklip improved in sustainability ratings. WWF-SASSI launched its app and volunteer programme. Awareness grew, with 80% of the market aware of WWF-SASSI by 2017. Shoprite joined as the fifth national retailer.

2021-2022

WWF-SASSI launched the Fish ID app and explored expansion into Seychelles. Awareness of WWF-SASSI rose to 47%. WWF-SASSI was included in the Marine Science curriculum and published a UN-recognised case study. Over 5000 people in culinary/hospitality sectors were trained.

2024

Celebrating 20 years of WWF-SASSI

A fisherman wearing a green t-shirt and yellow shorts is holding a large, silvery fish with a yellow stripe along its side. He is standing in shallow water, and his reflection is visible. In the background, there are several red and white fishing boats and a hillside with houses.

TRACKING PERFORMANCE

PROGRESS TOWARDS SUSTAINABILITY COMMITMENTS

Each member's progress towards their seafood sustainability commitments is displayed in the pages that follow. The graphs show the species and volume they purchased in 2024, the noteworthy accomplishments from their biannual organisational assessments, and the development made by each individual since they joined the WWF-SASSI Retailer/Supplier Participation Scheme. The need to highlight the differences in sustainability performance between their private label seafood products and those of proprietary brands has been identified. From 2025 onwards, tracking WWF-SASSI's RSPS participants progress will be that of proprietary brands vs private brands.

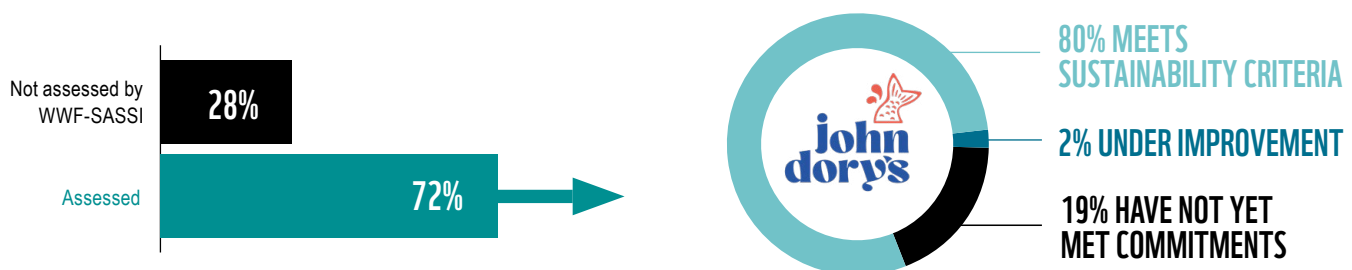
© WWF South Africa

JOHN DORY'S

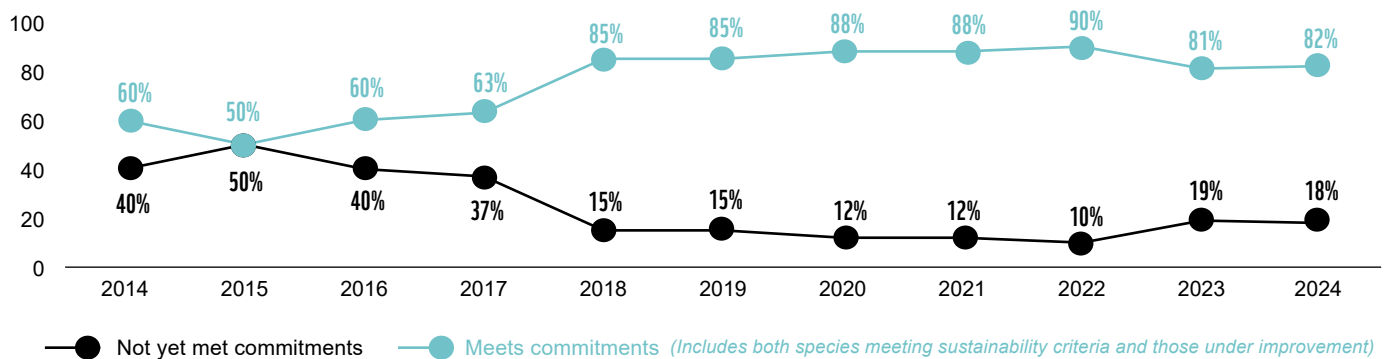
PROGRESS BY SPECIES



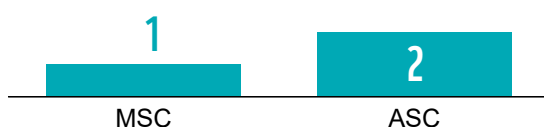
PROGRESS BY VOLUME



JOHN DORY'S PROGRESS THROUGH THE YEARS (SPECIES)



NUMBER OF CERTIFIED SPECIES SOLD



“At John Dory’s, we champion seafood sustainability to protect ocean ecosystems and ensure long-term industry viability. Through collaboration with responsible partners, we meet customer expectations while safeguarding marine resources for future generations.”
- Robin Charles, SPUR Corp (John Dory’s)

Noteable achievement: Achieved a 1% increase in meeting sustainability commitments by species.

John Dorys Fish, Grill, Sushi

@johndoryssa

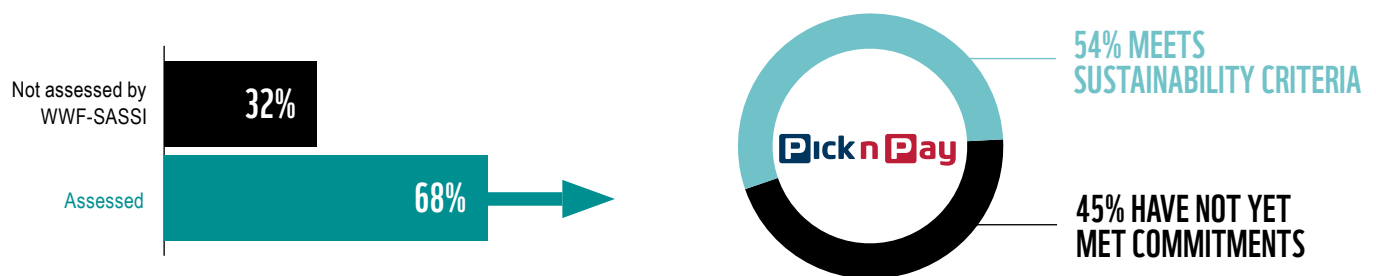
myJohnDorysSA

PICK N PAY

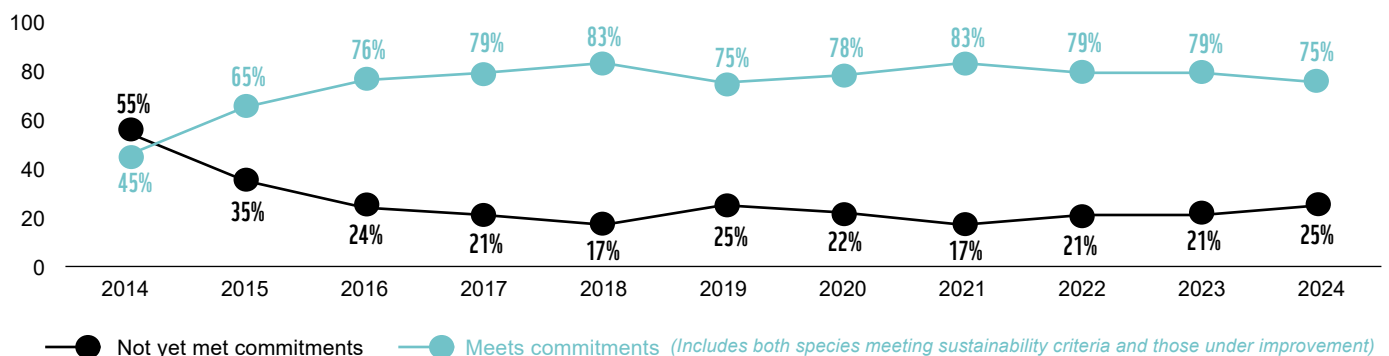
PROGRESS BY SPECIES



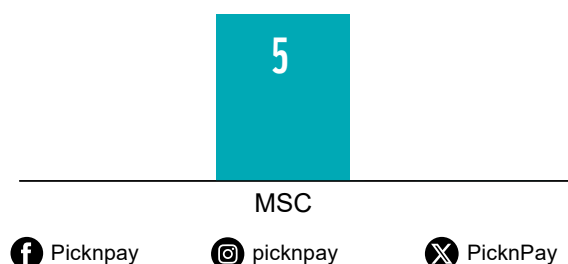
PROGRESS BY VOLUME



PICK N PAY'S PROGRESS THROUGH THE YEARS (SPECIES)



NUMBER OF CERTIFIED SPECIES SOLD



"Partnering with WWF-SASSI has transformed how Pick n Pay approaches seafood sourcing, driving stronger policies and supplier practices. By 2030, our goal is to source 100% sustainable seafood."
- Clayton Baron, Pick n Pay

Notable achievement: Achieved a 5% increase in meeting sustainability commitments by volume.

FOOD LOVER'S MARKET

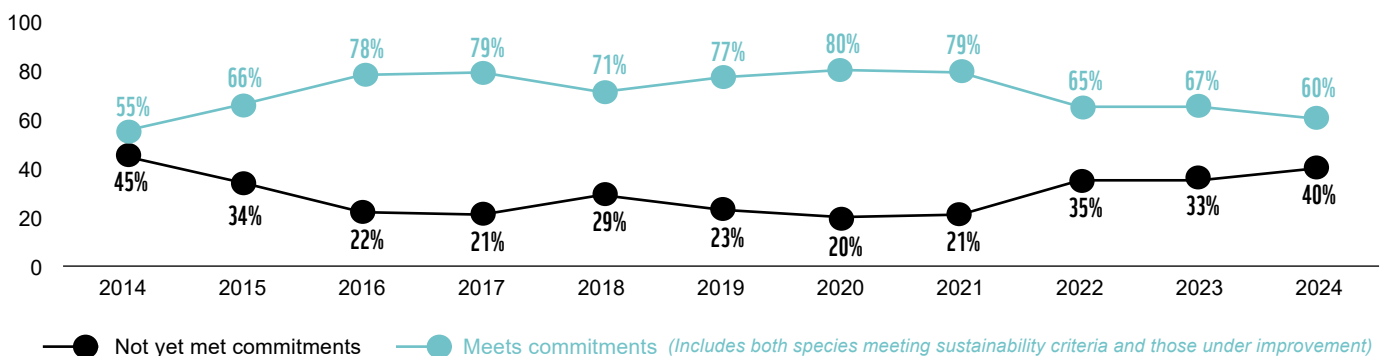
PROGRESS BY SPECIES



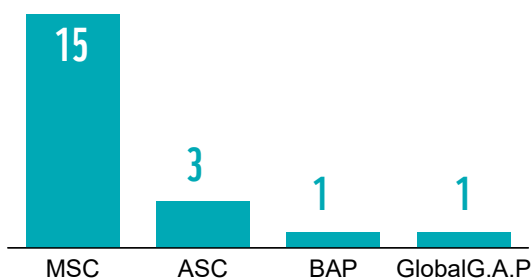
PROGRESS BY VOLUME



FOOD LOVER'S PROGRESS THROUGH THE YEARS (SPECIES)



NUMBER OF CERTIFIED SPECIES SOLD



"Our vision is to be part of a thriving seafood system where every choice supports healthy oceans, responsible fisheries and resilient coastal communities."
- Roberto Gastaldi, Food Lover's Market

Notable achievement: Achieved a 9% increase in meeting sustainability commitments by volume.

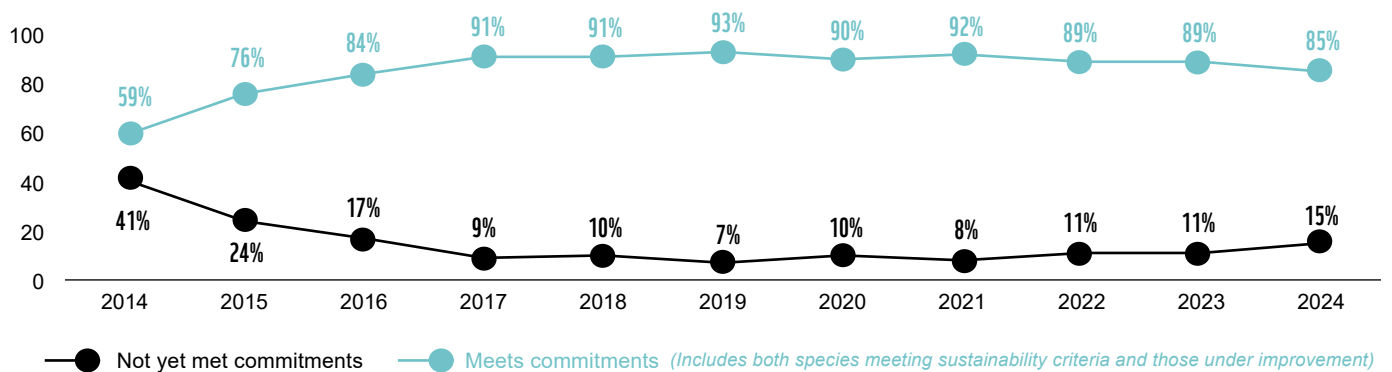
PROGRESS BY SPECIES



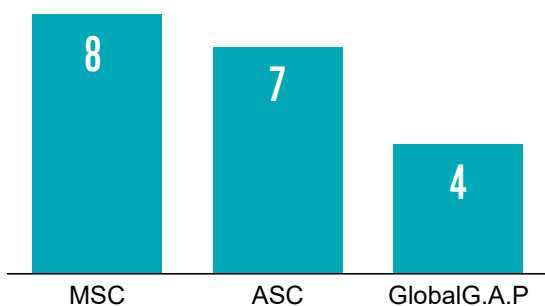
PROGRESS BY VOLUME



WOOLWORTHS' PROGRESS THROUGH THE YEARS (SPECIES)



NUMBER OF CERTIFIED SPECIES SOLD

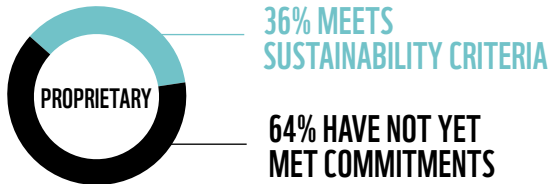
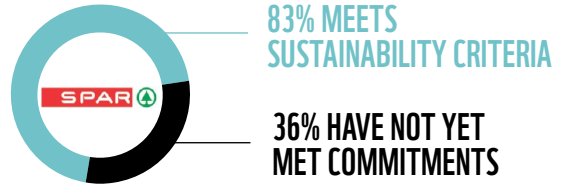


"Seafood sustainability is a dynamic journey of improvement and innovation towards an inclusive, regenerative and resilient blue economy that merges biodiversity and ecosystem conservation with sustainable development."
- Gert le Roux, Woolworths

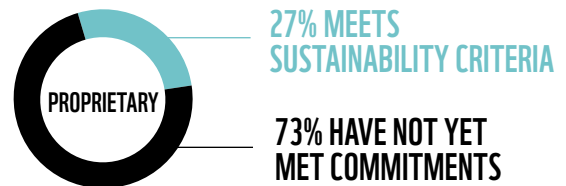
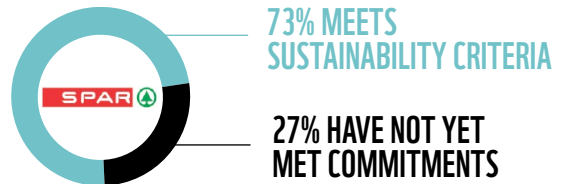
Notable achievement: Added five more species that are under improvement to the procurement list.

THE SPAR GROUP LIMITED

PROGRESS BY SPECIES

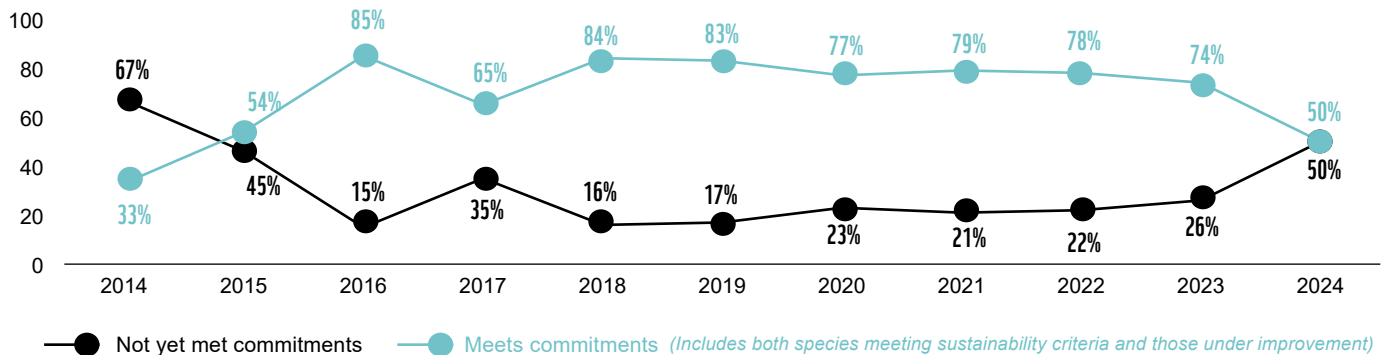


PROGRESS BY VOLUME



SPAR'S PROGRESS THROUGH THE YEARS (SPECIES)

*SPAR Private label and proprietary branded products combined.



NUMBER OF CERTIFIED SPECIES SOLD

3

MSC

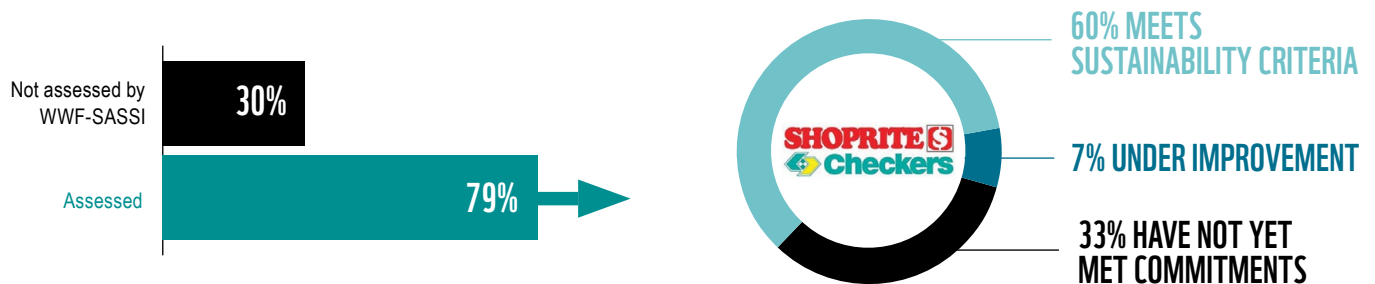
SPAR assessed the sustainability of its seafood range, comparing private label and proprietary brands.

Notable achievement: Results showed 83% of private label products meet sustainability commitments, with two seafood products being from MSC-certified fisheries.

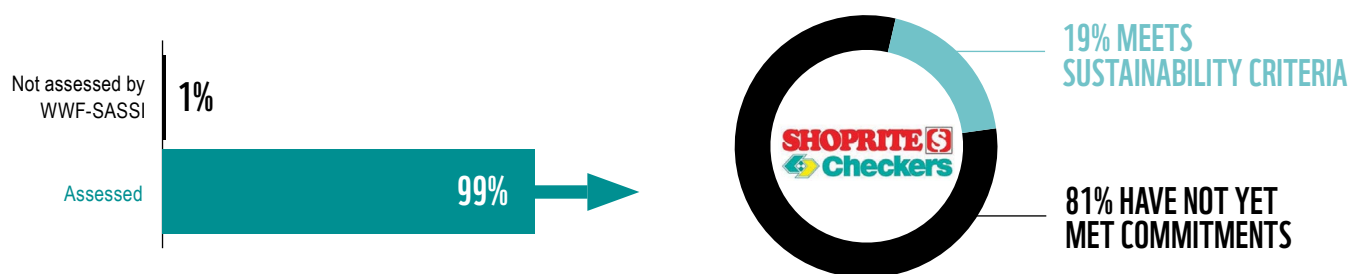
“Our vision is to meet our sustainability commitments by continuously improving our procurement practices and making a positive impact on the environment and our communities through responsible seafood sourcing.”
- Lonwabo Manqana, SPAR

SHOPRITE HOLDINGS GROUP

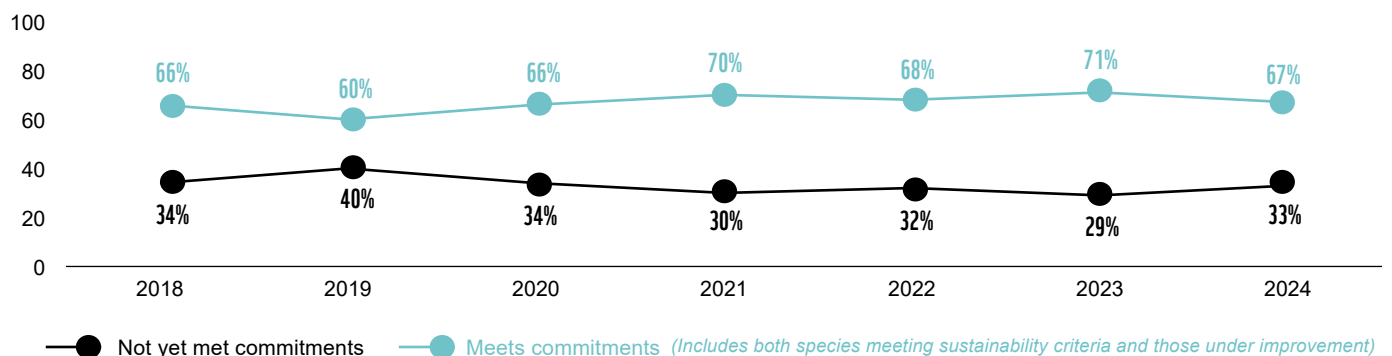
PROGRESS BY SPECIES



PROGRESS BY VOLUME



SHOPRITE HOLDINGS GROUP'S PROGRESS THROUGH THE YEARS (SPECIES)



NUMBER OF CERTIFIED SPECIES SOLD



"We are committed to strengthening procurement and proactively managing seafood supply chain risks. We aim to ensure all premium private label seafood is responsibly sourced, fully traceable and aligned with globally recognised sustainability standards."
- Sanjeev Raghubir, Shoprite / Checkers

Notable achievements: Added 10 more green listed species to the procurement list, while 99% of volume was assessed, increasing by 1%.

ATLANTIS FOODS

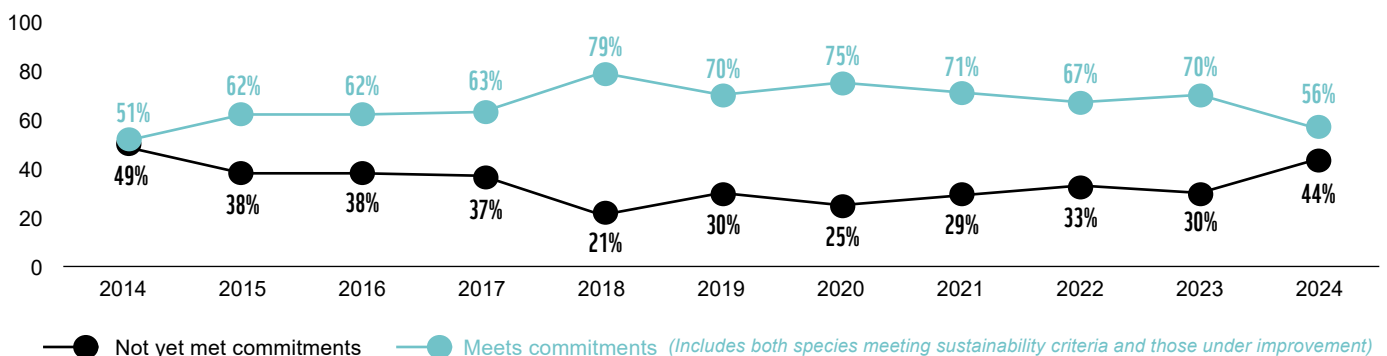
PROGRESS BY SPECIES



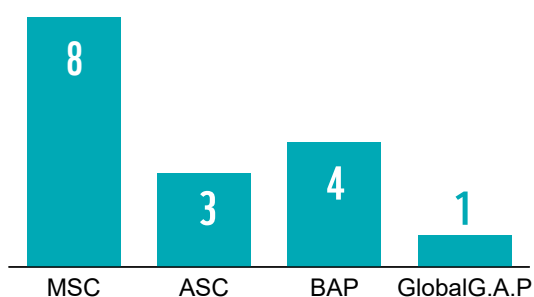
PROGRESS BY VOLUME



ATLANTIS FOODS GROUP'S PROGRESS THROUGH THE YEARS (SPECIES)



NUMBER OF CERTIFIED SPECIES SOLD



"We are proud to partner with WWF-SASSI and our industry to safeguard sustainable seafood supply chains, and we hope that by 2030 sustainable seafood is the standard for the entire South African market."

- Andre Cloete, Atlantis Foods Group

Notable achievement: Increased number of certified species by four.



TRANSFORMING THE MARKET

IT ONLY TAKES ONE MOMENT OF ACTIVISM TO SHIFT THE DIRECTION OF CHANGE.

According to an old WWF-SASSI folktale, a woman in then-Port Elizabeth (Gqeberha) made a single call to a local radio station as she wanted to know why a red-listed species was on the shelf of a local supermarket. This moment changed the course of seafood retail and made businesses take sustainability seriously. As the intermediary between shops and customers, the WWF-SASSI RSPS is now more important than ever.

FIVE KEY TAKEAWAYS FROM OUR CONSUMER SURVEY

The sustainability of South Africa's marine ecosystems depends heavily on consumer choices and behaviour. The latest WWF-SASSI survey reveals encouraging trends and critical areas for improvement in sustainable seafood consumption. Here are the most important findings and insights from the 2025 survey:

1. SEAFOOD CONSUMPTION CONTINUES TO RAPIDLY GROW

The number of South Africans who eat seafood has significantly increased, rising from 13.9 million in 2022 to 16.7 million in 2025. Alongside this growth, an increasing number of consumers are incorporating seafood into their diets more frequently, with a notable rise in those eating seafood more than once a week. This suggests seafood is becoming a staple in many households. Additionally, prepared seafood products are gaining popularity, reflecting evolving lifestyles where convenience plays a larger role in food choices.

2. SUSTAINABILITY IS BECOMING A KEY FACTOR IN SEAFOOD CHOICES

While taste and price continue to be the dominant factors influencing seafood purchases, sustainability has now emerged as one of the top 10 drivers of consumer choice. In 2025, 65% of consumers actively seek out sustainable seafood options, marking an increase from 59% in 2022. This shift demonstrates growing environmental awareness among South African seafood lovers. However, there remains a significant portion (about 30%) who are uncertain about the sustainability of their seafood choices, underscoring the need for enhanced education and clearer labelling to help consumers make confident, ocean-friendly decisions.

3. KNOWLEDGEABLE RETAIL STAFF AND CLEAR LABELLING DRIVE SUSTAINABLE CHOICES

The survey highlights the powerful role that retail and restaurant environments play in shaping consumer behaviour. Nearly half of respondents (49%) identified 'knowledgeable retail staff' as the most influential factor in their decision to buy sustainable seafood. Clear labelling on seafood products also ranked highly, with 38% of consumers citing it as a key driver. These findings emphasise that well-informed retail staff and transparent product information are essential levers for encouraging sustainable seafood consumption.

4. CONSUMERS RELY ON RETAILERS TO LEAD THE WAY

A striking 83% of consumers believe that retailers should bear the responsibility for ensuring that the seafood they sell is ocean friendly. This level of trust places significant pressure on retailers to provide clear, accessible information and to visibly promote sustainable seafood options. Retailers are expected not only to stock sustainable products but also to communicate their sustainability commitments effectively. The survey underscores the importance of retailer accountability and the need for staff training to empower employees to guide customers toward better choices.

5. STRATEGIC ACTIONS NEEDED TO BOOST SUSTAINABLE SEAFOOD CHOICES

To accelerate sustainable seafood consumption, WWF-SASSI recommends several targeted interventions:

- Enhanced information at points-of-purchase to make sustainability easy to understand.
- Clear communication about supply chain accountability.
- Improved visibility of sustainable seafood options in stores.
- Prioritised retail staff training to empower knowledgeable customer interactions.
- Better on-pack labelling and retailer-led sustainability messaging to build consumer confidence.
- Increased retailer accountability narratives to foster trust and transparency.

These findings from the 2025 WWF-SASSI National Consumer Survey reveal a promising upward trend in sustainable seafood awareness and consumption in South Africa, while highlighting clear opportunities for retailers and stakeholders to deepen engagement and protect the country's precious marine ecosystems.

Kirtanya Maharaj

WWF-SASSI Outreach & Awareness Manager

FIGURE 2. ATTITUDES TOWARD SEAFOOD SUSTAINABILITY

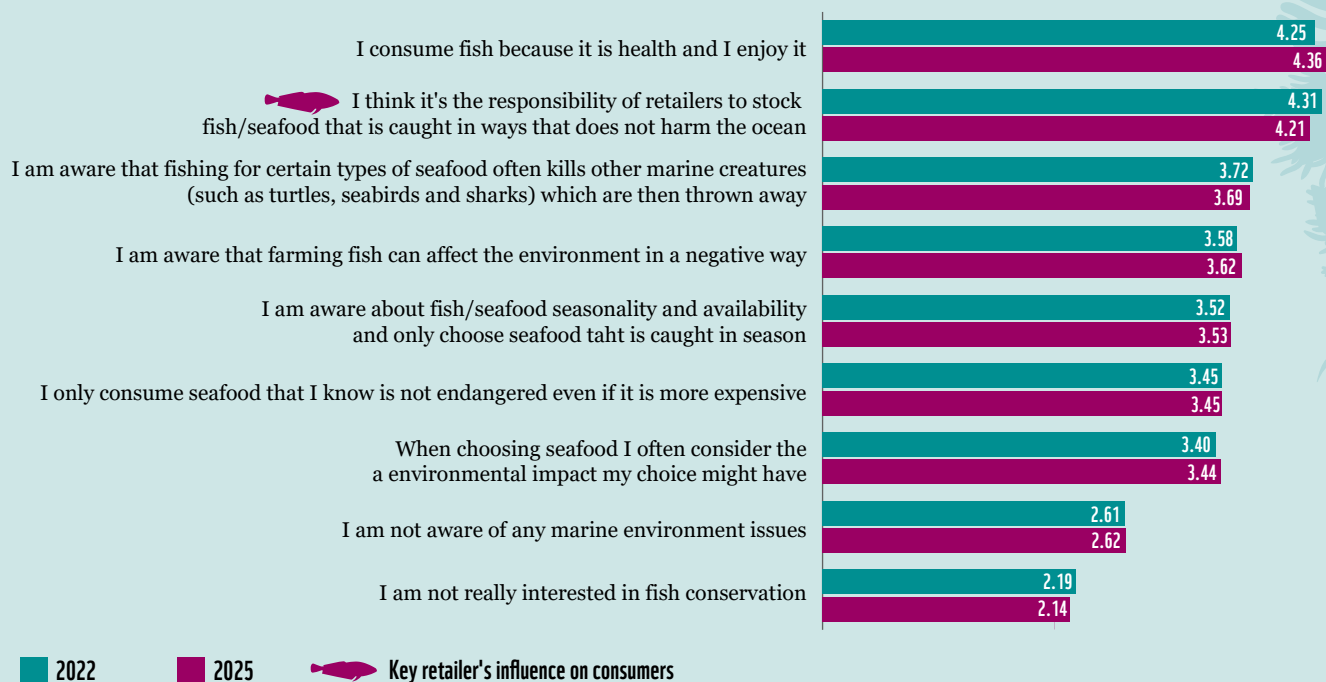


FIGURE 3. CURRENT SUSTAINABLE SEAFOOD CONSUMPTION

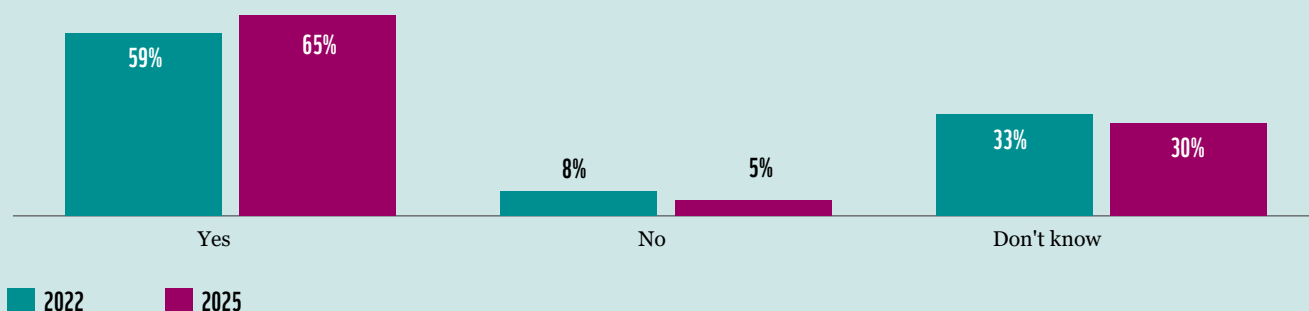
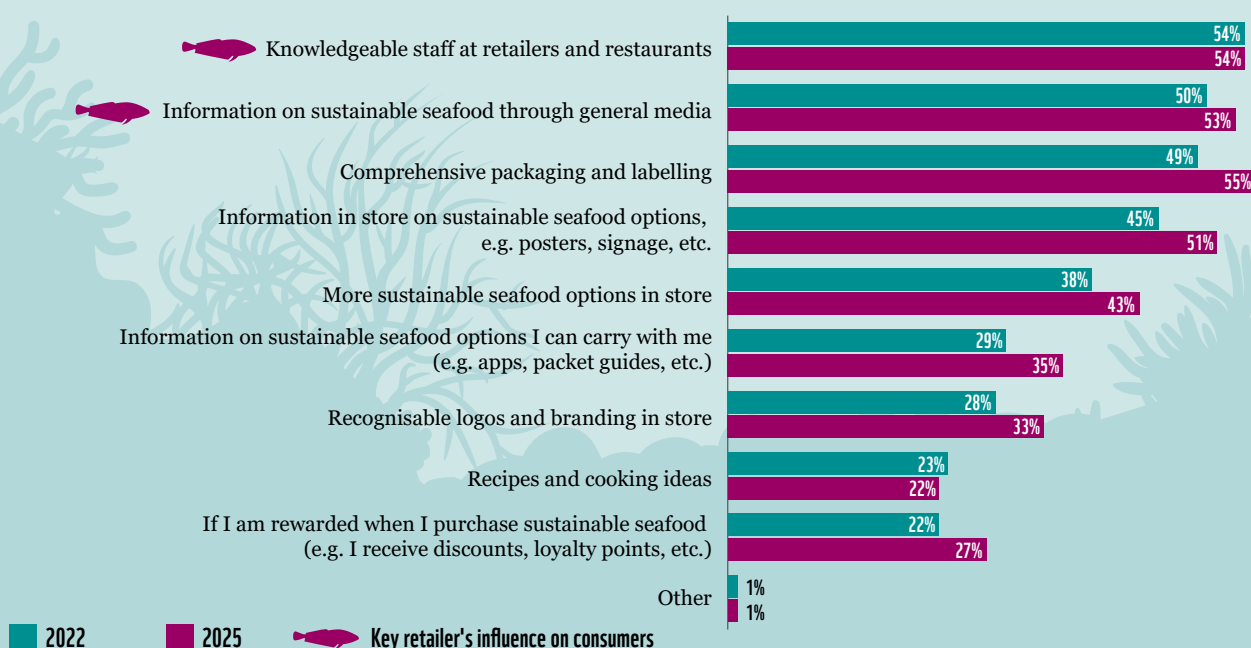


FIGURE 4. DRIVERS OF SUSTAINABLE SEAFOOD CONSUMPTION



CONSUMER AWARENESS IN CONTEXT

Achieving seafood sustainability depends on the intricate relationship between consumer campaigns, market dynamics, regulations and ecological health. Progress requires sustained advocacy and robust regulatory enforcement. It is an ongoing journey, not a quick fix.

Consumer awareness is just the first step in safeguarding our oceans. WWF-SASSI has been around for two decades, beginning with the goal to raise consumer awareness about seafood sustainability. It shares space with other campaigns like Seafood Watch in the US and Ocean Wise in Canada.

WWF-SASSI and others have raised awareness of overfishing and harmful practices, promoting sustainable seafood as a key solution.

However, the effectiveness of campaigns varies based on target audience, reach, message clarity and simplicity of decision-making tools. Awareness is crucial but doesn't always lead to action or structural change.

This is known in behavioural science as the awareness-action gap, depending on attitudes, behaviours and willingness to change. Overcoming this is a major challenge in transforming the seafood system.

These campaigns also compete for attention alongside other environmental demands like reducing plastic use, conserving water and eating less red meat, while people also juggle the daily tasks of their lives.

Thus, sustainable seafood campaigns must do more than raise awareness; they must influence beliefs and values, and challenge habits.

WWF-SASSI's 20 years of consumer research show that price, taste, type and accessibility are key factors in seafood purchases. Long-standing dietary habits make switching difficult. Many consumers resist paying higher prices, limiting impact.

It is clear awareness campaigns must aim for systemic change that improves fish stocks and marine ecosystems. They work best when integrated with broader fisheries frameworks and marine protected area strategies, including certification schemes like the Marine Stewardship Council, FIPs, retailer and supplier commitments, and marine spatial planning.

Awareness campaigns cannot stand alone to shift purchasing patterns. A key strategy has been partnering with retailers, suppliers and restaurants to embed sustainable seafood procurement and promotion into business operations.

Five years after its inception, WWF-SASSI launched the Retailer/Supplier Participation Scheme (RSPS), with major retailers, two seafood chains and a supplier committed to sourcing green-listed, certified or improved seafood. The RSPS complements the consumer programme, reflecting a comprehensive market-based approach.

RSPS members say consumers aren't as selective as hoped, but WWF-SASSI research shows sustainability matters to many. The RSPS has highlighted supply chain, and reputational and market risks from unsustainable sourcing, leading to operational improvements: better data management, improved communication, less greenwashing, enhanced supplier systems and, sometimes, improved labelling and traceability.

RSPS members agree WWF-SASSI has increased awareness of overfishing's impact, and tools like the traffic light system (green = best buy, orange = think twice, red = don't buy) help consumers make better choices. Would these changes have occurred without WWF-SASSI? Evidence suggests WWF-SASSI was pivotal.

But despite these efforts, market-based approaches alone cannot enforce sustainable fishing practices industry-wide. Regulatory compliance remains the government's responsibility, requiring active involvement alongside non-regulatory approaches to manage oceans effectively.

Enforcement has declined and policy updates are limited, hindering systemic change. Therefore, WWF-SASSI will double its non-regulatory efforts to protect and sustainably use ocean resources, because inaction comes at a cost we cannot afford!

Pavitray Pillay

Corporate Engagement and Behaviour Change Lead &
Head of Business Development

WWF South Africa



CONSUMER SHIFTS AND SOCIAL DYNAMICS

- Sustainable seafood campaigns in South Africa face unique challenges and opportunities due to evolving consumer demographics.
- Post-Apartheid era saw increased seafood demand, especially among younger, black South Africans with disposable income.
- There is a rising popularity of aspirational seafood like sushi and poke, now widely available in major retailers nationwide.
- WWF-SASSI adapted messaging and behavioural nudges to engage this new audience while maintaining existing supporters.
- Small-scale fishers feel marginalised as many of their target species are red-listed by WWF-SASSI, limiting market access.
- WWF-SASSI's rating system is primarily ecological; only recently has the human dimension (livelihoods) been considered.
- Transitioning to sustainable species is perceived as a threat to small-scale fishers' income.
- Opportunity exists to incorporate indigenous knowledge and human factors into species assessments, though engagement is challenging.



GLOBAL GEOPOLITICS AND MARKET PRESSURES

- Seafood is highly globalised; 50% of South Africa's catch is exported due to better returns and quality in international markets.
- Cheaper, unsustainable seafood imports fill local demand, complicating sustainability efforts.
- The Russia-Ukraine conflict and EU sanctions on Russian seafood have flooded the South African market with unrated Russian species (pollock, sardine).
- These imports help stabilise supply but come with poor infrastructure, lack of traceability, and unrated status.
- Such factors hinder sustainable seafood campaigns and long-term transformation of supply chains.



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FIPS: A SUSTAINABILITY JOURNEY IN FISHERIES GOVERNANCE

Fisheries Improvement Projects (FIPs) emerged in the early 2000s as a collaborative way to protect seafood stocks amid rising concern over ocean resource depletion. Bringing together diverse stakeholders, FIPs aim to transform fisheries into more sustainable operations while safeguarding the health and resilience of marine ecosystems.

Typical stakeholders would include government, environmental NGOs, fishing industry members, researchers and, more recently, retailers and suppliers. When these key stakeholders are united by a shared vision of sustainability, fishery practices and management are significantly improved to enhance the health of marine ecosystems and improve seafood security. A sustainable fishery is one in which exploitation of the target stock is not at the detriment of the population, impact of the interaction with marine ecosystems is minimised, and overall management of the fishery significantly improves.

By leveraging the influence of the private sector, the FIPs pathway provides stakeholders with environmental and socioeconomic incentives for fisheries to adopt more sustainable practices. This market-driven momentum not only encourages immediate improvements, but also lays the groundwork for long-term changes towards sustainable fishing practices

Ultimately, FIPs serve as a roadmap for embarking on a sustainability journey in fisheries management. They chart clear pathways for fisheries to transition from harmful or inefficient practices to models that are environmentally sound, economically viable and socially responsible.

QUICK GUIDE FOR RETAILERS: WHICH TYPE OF FIP COULD SUIT YOUR SUSTAINABLE SEAFOOD JOURNEY BEST?

BASIC VS COMPREHENSIVE FIPS	
Basic FIP	Comprehensive FIP
Addresses specific challenges	Addresses full range of challenges
MSC pre-assessment not required	Defined by a MSC pre-assessment
WWF-SASSI can be used as a baseline	MSC Fishery Standard used as a baseline
Ideal for fisheries where MSC certification is not the end goal	Goal is MSC certification with no or minimal conditions
Focus on the local market	International market focus

Fishery Improvement Projects must have the following characteristics:

- Draw upon market forces (suppliers, retailers, traders, food service, fishing industry, seafood consumers or other relevant forces) to motivate ongoing fishery improvements.
- A work plan with measurable indicators and milestones along a defined timeline and an associated budget.
- Explicit willingness from participants to make practical improvements in the water.
- Commitment and willingness from participants to make investments required to achieve improvements as outlined in the work plan, including clear roles and responsibilities of key stakeholders.
- An independent system for tracking progress.
- A pre-defined maximum timespan (allowing for exceptions due to special external circumstances as long as significant progress is made).
- Annual review of progress and transparency of the review-results (publicly accessible).
- Where practicable, agree to participate in performance benchmarking undertaken by an approved independent body to report on progress against MSC Standards, once a benchmarking tool is adopted.
- A formal process for terminating participation in or support for the programme.
- Clearly defined guidelines and agreements on scope and depth of communications.

FIP PATHWAY BY WWF

Multi-stakeholder collaborative approach



Stage 0: FIP Identification

A target fishery is identified, and a supply chain analysis is conducted to understand who else is involved in the fishery and what market leverage exists to help improve the fishery.



Stage 1: FIP Development

The fishery's performance is evaluated against the MSC Standard, and stakeholders are recruited to participate in the project.



Stage 2: FIP Launch

The project participants and work plan are finalized and made public, and an associated budget is adopted by participants.



Stage 3: FIP Implementation

The fishery starts addressing its sustainability weak points and begins tracking its progress to increase transparency.



Stage 4: Improvements in Fishing Practices or Fishery Management

The fishery shows that it has improved fisheries policy or management, or that it has modified fishing practices.



Stage 5: Improvements on the Water

The fishery demonstrates improvements on the water such as reduced fishing mortality, habitat impacts and bycatch.

FACT BOX: ADDED BENEFITS OF A FIP

- Access to global marketplace
- Boosts fishing-related livelihoods
- Improving consumer confidence in the sustainability of the supply chain
- Enhances fisheries' reputations
- Improves seafood security

FROM VISION TO ACTION: WWF-SASSI RSPS PARTICIPANTS AND FIP PARTNERS

FIPs typically run for 3-5 years and over the past two decades, WWF has been instrumental in conceiving, co-designing and implementing numerous FIPs across both small-scale and large-scale industrial fishing sectors. Two of our success stories on the sustainability journey include two MSC-certified fisheries: the South African hake trawl, and the tuna pole-and-line fishery, which achieved MSC certification in August 2024.

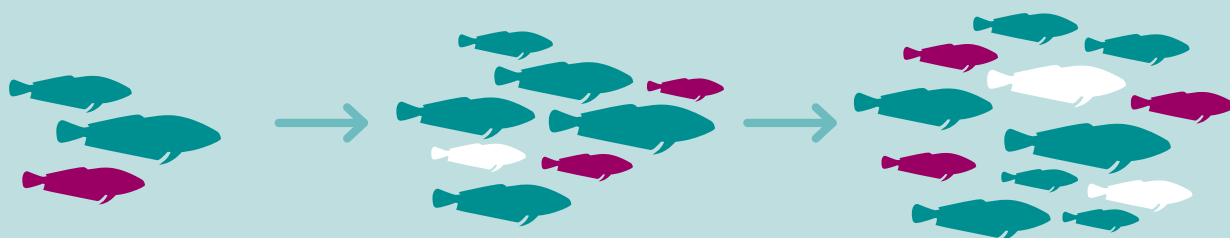
As part of their journey, a number of FIPs have been initiated, supported and funded by RSPS participants over the years who identified the need to improve local and international fisheries. To date, there are three FIPs (either active or in development stage) that are supported by WWF-SASSI RSPS participants: beach seine and gillnet FIP for Harders, Hake trawl FIP, and the large pelagic longline FIP.

WORKING TOWARDS A COLLECTIVE

SCHOOL OF THOUGHT: SWIMMING TOGETHER TOWARD SUSTAINABLE SEAFOOD

Every RSPS participant is on their own sustainable seafood journey, but they are all committed to transforming the seafood market. The aim is to make a sustainable seafood market the default, where the majority of seafood sold is sustainably and responsibly sourced.

In 2017, WWF-SASSI set out to transform the scheme comprised of a three-phase plan that would increase collaboration to make it a reality as sustainability challenges cannot be effectively met by an individual company's efforts. The phases included:



PHASE 1 (2017 TO 2025)

Ensure all commitments are comprehensively met by the target dates RSPS participants have set themselves.

PHASE 2 (2019-2022)

WWF facilitates collaborative efforts to address key challenges. Sustainability to be entrenched in the seafood market through the establishment of a formalised collective structure.

PHASE 3 (2020-2025)

Scheme participants establish a formalised structure within the South African seafood market where they co-invest in fisheries level improvements.

While the RSPS path has presented its share of challenges, progress continues steadily with participants remaining actively engaged and taking meaningful steps across each phase.

There's still room to grow, and the opportunity to unite as a collective is stronger than ever. Together, we can make responsibly and sustainably sourced seafood not just an aspiration, but the default choice for all.

And that is what we are doing next, with newly set goals and milestones, working towards transforming the seafood industry.



PHASE 1: RSPS PARTICIPANTS ELEVATING BRAND STANDARDS THROUGH RESPONSIBLE SOURCING

Private labels (store brands or home-brands or private label) are products specifically designed and sold under a specific retailer name. Proprietary labels are owned by a company (manufacturer, converter or distributor) that are available across multiple retailers, with retailers not having a say in the manufacturing process or the labelling and packaging of the products.

Some advantages of a private label are flexibility, innovation, traceability and control of product composition and development. Private labels foster brand loyalty and drive customer traffic to a particular retailer.

As of the 2025 WWF-SASSI RSPS annual report, the sustainability journey of all WWF-SASSI RSPS participants' private label seafood products will be reported. Our retailers and suppliers are committed to offering sustainably and responsibly sourced seafood, and many have introduced their own private label seafood ranges, allowing for full control over sourcing, labelling, packaging and distribution decisions.

This will not only highlight the progress retailers are making through their private label sustainability efforts but also help show how much proprietary brands are shaping the overall journey, sometimes pulling the numbers down and shining light where more work is needed. These private labels are starting to set the tone for broader industry practices and helping shape consumer expectations around sustainable seafood.

Thus, phase 1 will include the following focus areas:

- Private/ Retailer House labeled seafood products:
 - By 2030: majority of seafood products sold being that of sustainably and responsibly sourced
- Proprietary brands outside Private/House labeled seafood products:
 - By 2030: more than half of seafood products sold being that of sustainably and responsibly sourced



PHASE 2- TRACEABILITY AND TRANSPARENCY REGARDING SEAFOOD PRODUCTS FROM SUPPLIERS

Traceability is about knowing the start of where and when raw material used for a product is sourced. With a clear journey, one can track and trace throughout its supply chain up to the processing facility, followed by packaged or fresh product reaching its destination. The seafood sector is one of the most challenging sectors when it comes to traceability, so until traceability becomes a norm consumers' choice in choosing sustainable and responsibly sourced seafood products is hampered.

To help increase traceability in the seafood sector, phase 2

- A seafood procurement automated template to aid retailers in receiving the most accurate and transparent information from the suppliers
- SANS 1647 labelling on majority of private labelled products sold
- Retailers to develop a seafood database for tracking and traceability



PHASE 3 - DEVELOPMENT OF A COLLECTIVE

Sustainable seafood becomes the default in the retailer and supplier space through the work of a collective.

Focus areas:

- Encourage fisheries and farms to continuously improve practices that align with sustainable and responsible seafood production.
- Proactive engagement in sustainable seafood initiatives, with a primary focus on driving improvements at the fisheries level.
- Foster a collaborative collective that supports sustainable fisheries and responsible aquaculture, benefiting both communities and the businesses that rely on them.

Sustainably sourced refers to using resources in a way that maintains ecological balance and ensures long-term availability.

Responsibly sourced goes further to include ethical considerations like fair labour, community impact, and governance alongside environmental sustainability.

THANK YOU FOR BEING PART OF OUR JOURNEY



A special thanks from WWF-SASSI to all who have played a vital role over the past two decades:

- Dr Kerry Sink (Principal Scientist and Marine Programme Manager, SANBI)
- Emeritus Prof George Branch (University of Cape Town)
- Partnerships and Funders
- TRAFFIC (Trade Records Analysis of Flora and Fauna in Commerce)
- The Department of Forestry and Fisheries & Environment (DFFE)
- uShaka Sea World in Durban, Bayworld in Port Elizabeth, Two Oceans Aquarium in Cape Town and the Johannesburg Zoo promotes the WWF-SASSI initiative to the public through their exhibits and education programmes uShaka SAAMBR and Two Oceans Aquarium facilitate WWF-SASSI restaurant training in their education facilities.
- Supporting partners have included WWF-South Africa; Ezemvelo KwaZulu Natal Wildlife; Iziko The Green Trust; Endangered Wildlife Trust; Sharklife; the Southern African Foundation for the Conservation of Coastal Birds; the South African Institute for Aquatic Biodiversity; the South African National Biodiversity Institute (SANBI); and the Endangered Wildlife Trust.
- Current education partners are: South African Environmental Observation Network (SAEON); South African Institute Aquatic Biodiversity (SAIAB); Two Oceans Aquarium; uShaka Marine World; The Southern African Foundation for the Conservation of Coastal Birds (SANCCOB); Save Our Seas; Explore 4 Knowledge (E4K); City of Cape Town; Birdlife South Africa; Johannesburg Zoo; Marine Stewardship Council (MSC).
- WWF-SASSI funders include the UN 10 YFP; Apple; Vodacom; BMZ- German Government; Nedbank Green Trust; RMB; Pick n Pay; Maas Maasen; Charles van der Merwe Trust; Vodacom; AVI Ltd; Vodafone/Vodacom.
- 2024 WWF-SASSI RSPS funders include Pick n Pay; Woolworths; Food Lovers Market; Shoprite Checkers; Spur Corp; Atlantis Foods Group; and Ocean Basket.
- The WWF-SASSI marine team (the science behind it all)
- To all the WWF-SASSI team members before us.

See WWF-SASSI: Through the year on YouTube @ WWF SASSI



Green Fish: Best choice – Sustainable choices from the healthiest and most well-managed fish populations and/or well-managed/sustainable farming methods.

Orange Fish: Think twice – Species that may be sold legally by registered commercial fishers and retailers. However, there are reasons of concern because:

- Overfishing
- Environmental damage and/or high bycatch
- Biology of species makes it vulnerable

Red Fish: Don't buy – Species either from unsustainable populations or those from unsustainable irresponsible practices or are specially protected species that are illegal to buy or sell according to the Marine Living Resources Act (MLRA).



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THE WWF-SASSI TOOLS



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OCEANS IS EVERYONE'S
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THIS VITAL, FRAGILE
ECOSYSTEM CONNECTS
US ALL — RETAILERS,
SUPPLIERS, AND
CONSUMERS ALIKE.
WHAT EACH OF US DOES
TRULY MATTERS.**



Lasting positive outcomes for people and nature in the places where we work and from priority environmental challenges we focus on.

FOR NATURE. FOR YOU.

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