



 Planet Tracker

# **The Financial Benefits of Seafood Traceability**

**4 November**



GORDON AND BETTY  
**MOORE**  
FOUNDATION



# Who **we** are

PLANET TRACKER IS A NON-PROFIT  
SUSTAINABLE FINANCE THINK TANK

Created to investigate the  
financial risks and opportunities  
related to environmental limits

- producing thought-provoking analytics
- providing interactive toolkits
- publicising findings
- engaging with financial markets and influencers
- effecting change

PLANET TRACKER IS PART OF:  
Tracker Group Limited

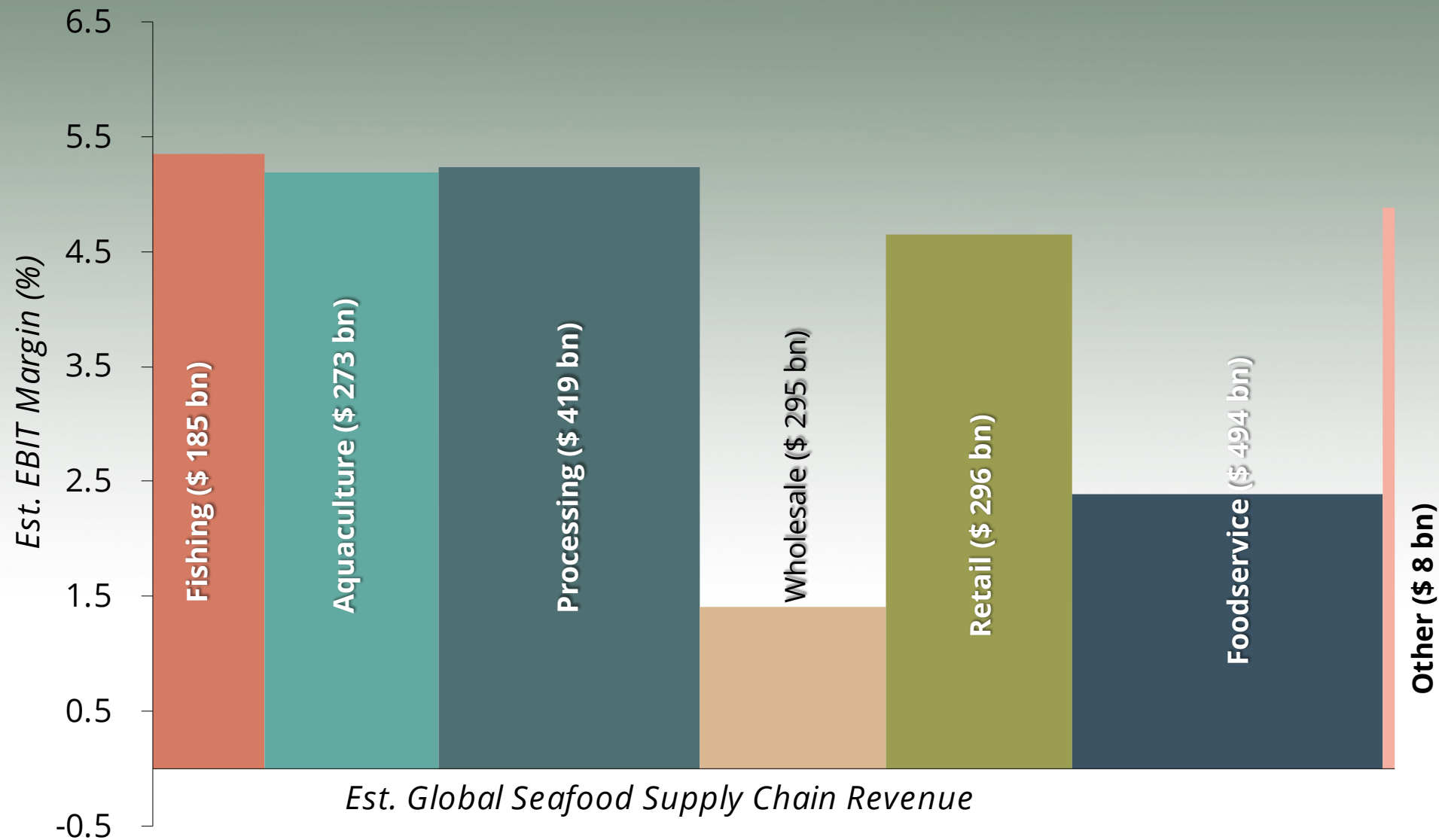






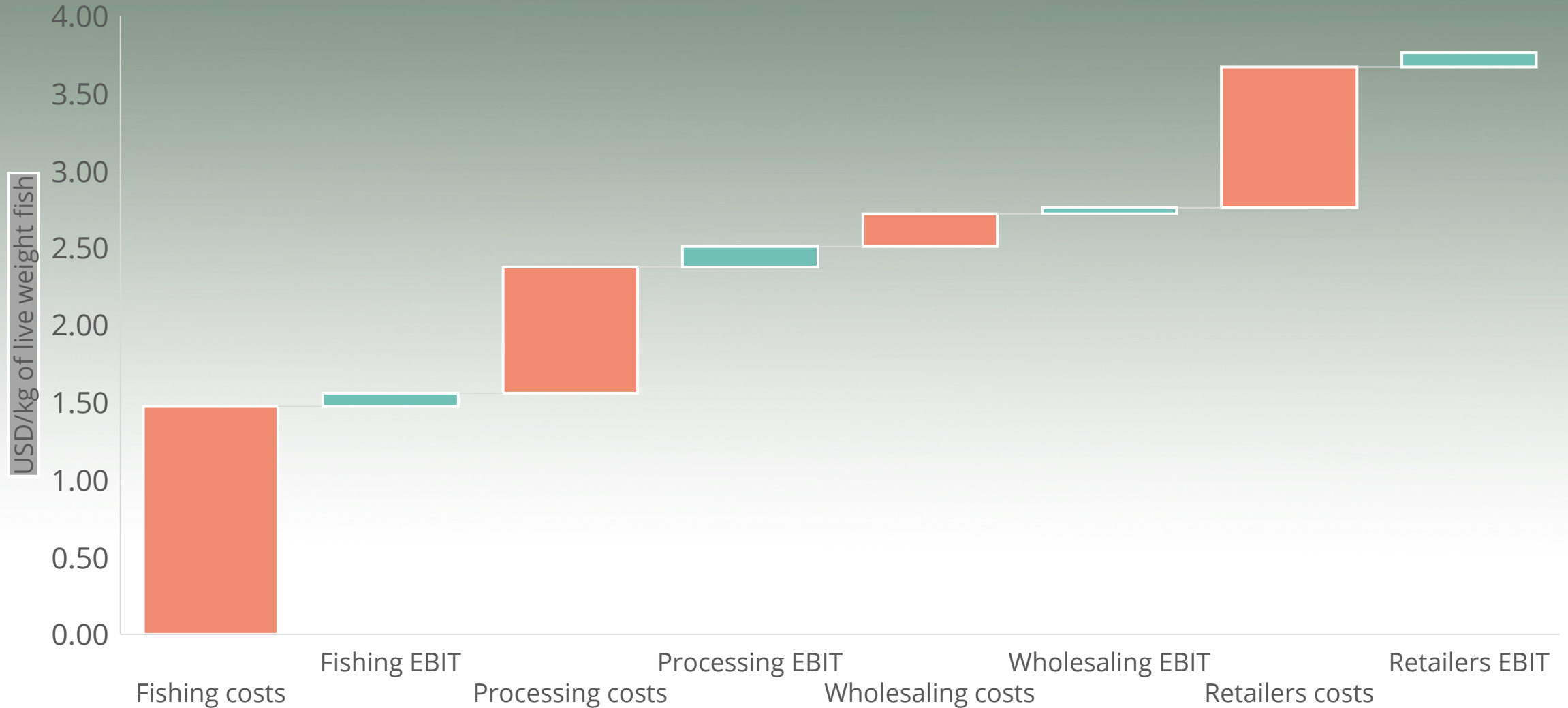
# **1. Seafood Profit Pools**

# A \$1.8tn supply chain, with low profits



The Global Seafood Profit Pool (2020), including IUU fish

# Production costs are the key driver of end prices



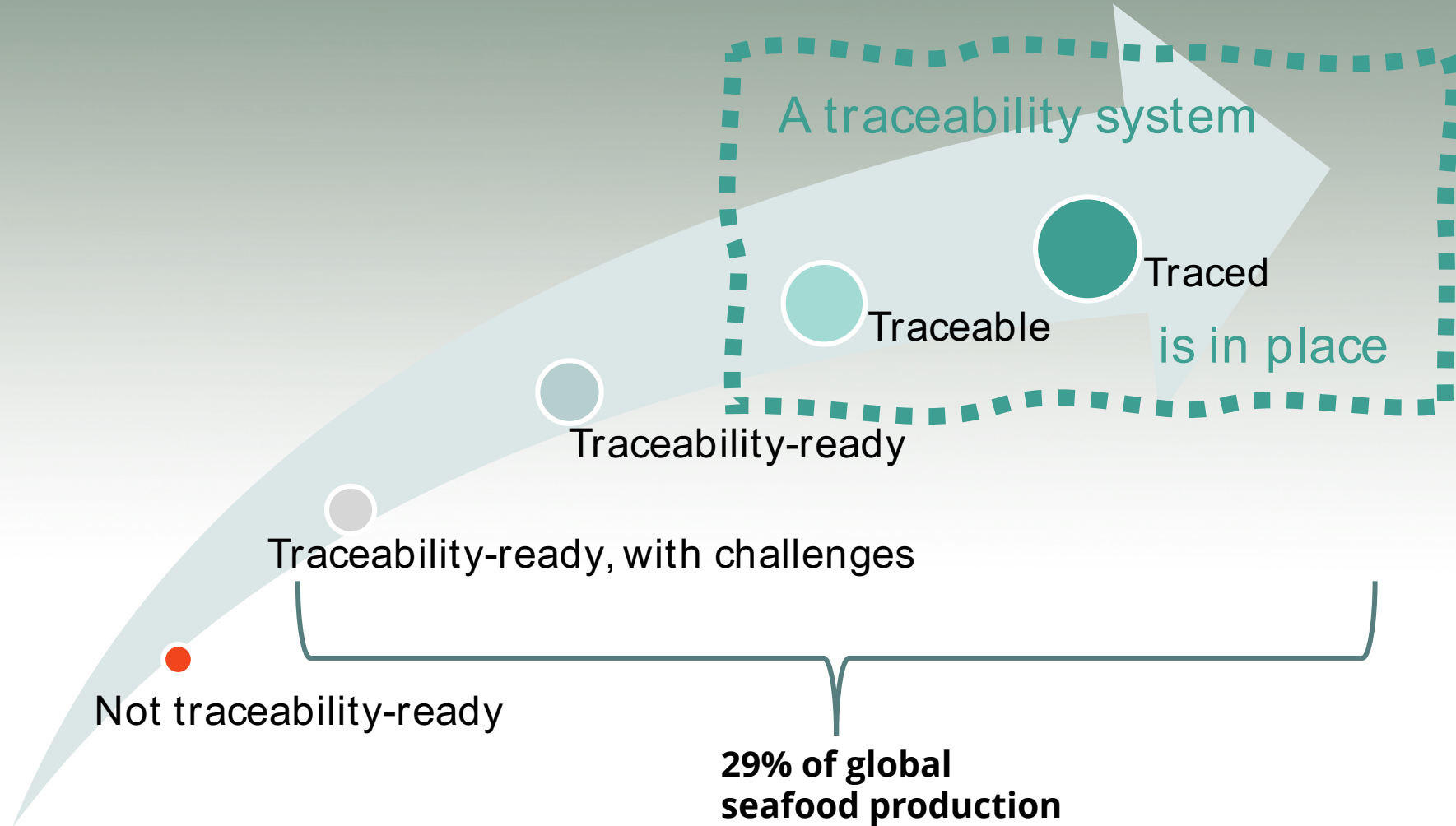
Split of the Global Average Retail Value ex VAT of 1 Kg of Wild-Caught Seafood (Source: Planet Tracker)



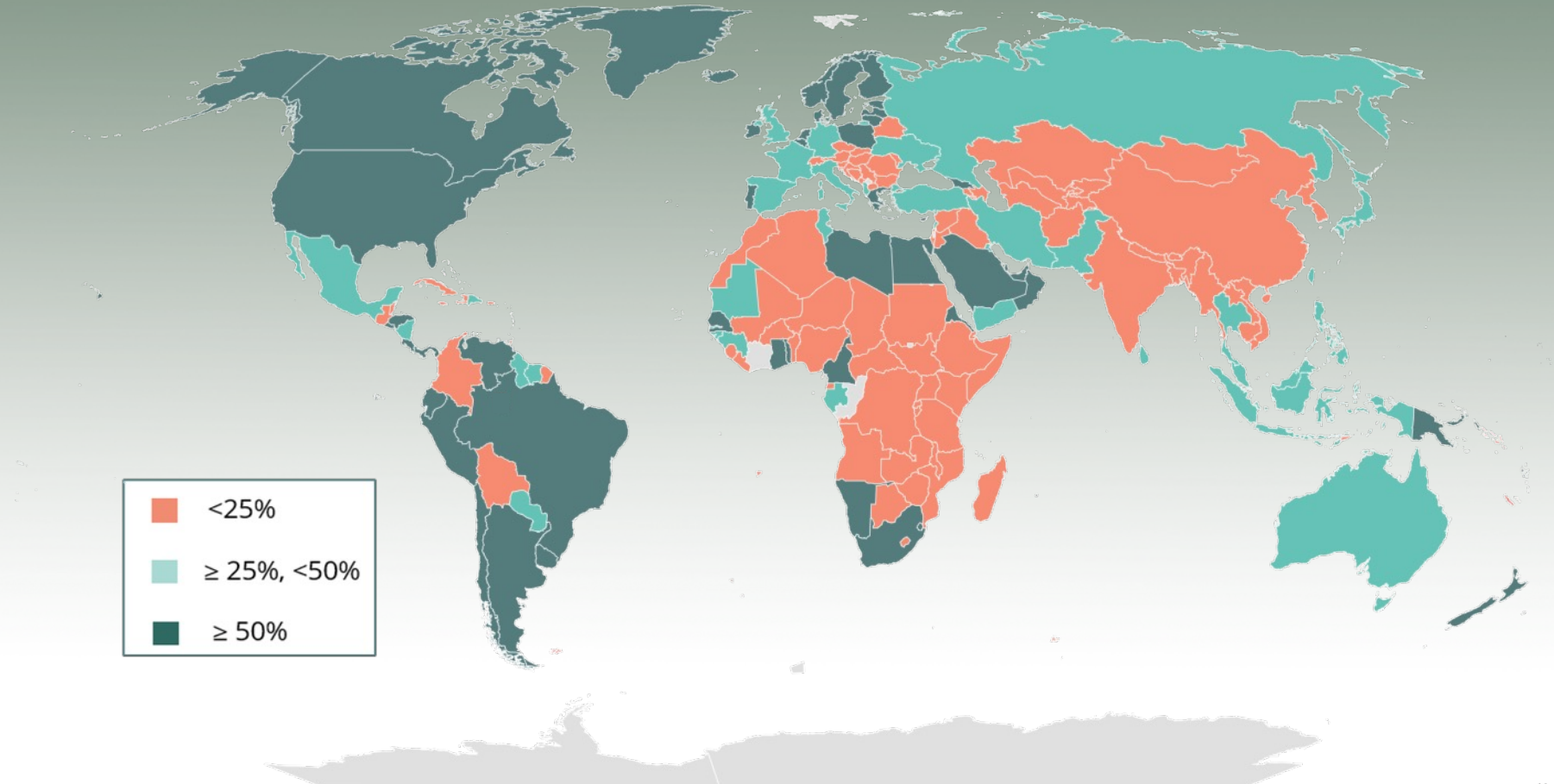


## 2. Fully Traceable Seafood Supply Chains?

# Introducing traceability readiness



# Traceability readiness by country



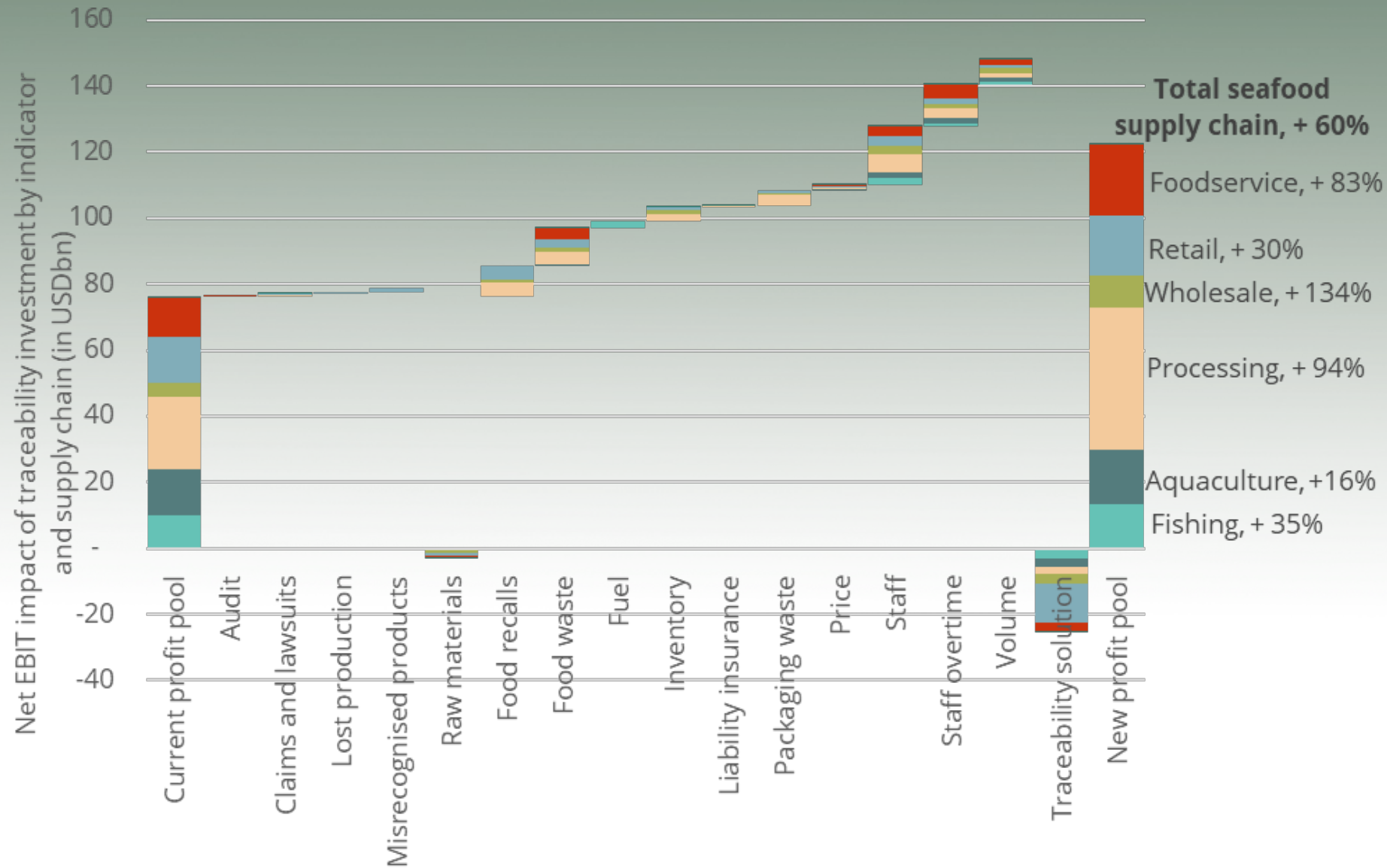
Proportion of National Seafood Production that is Traceability-Ready (Source: Planet Tracker)





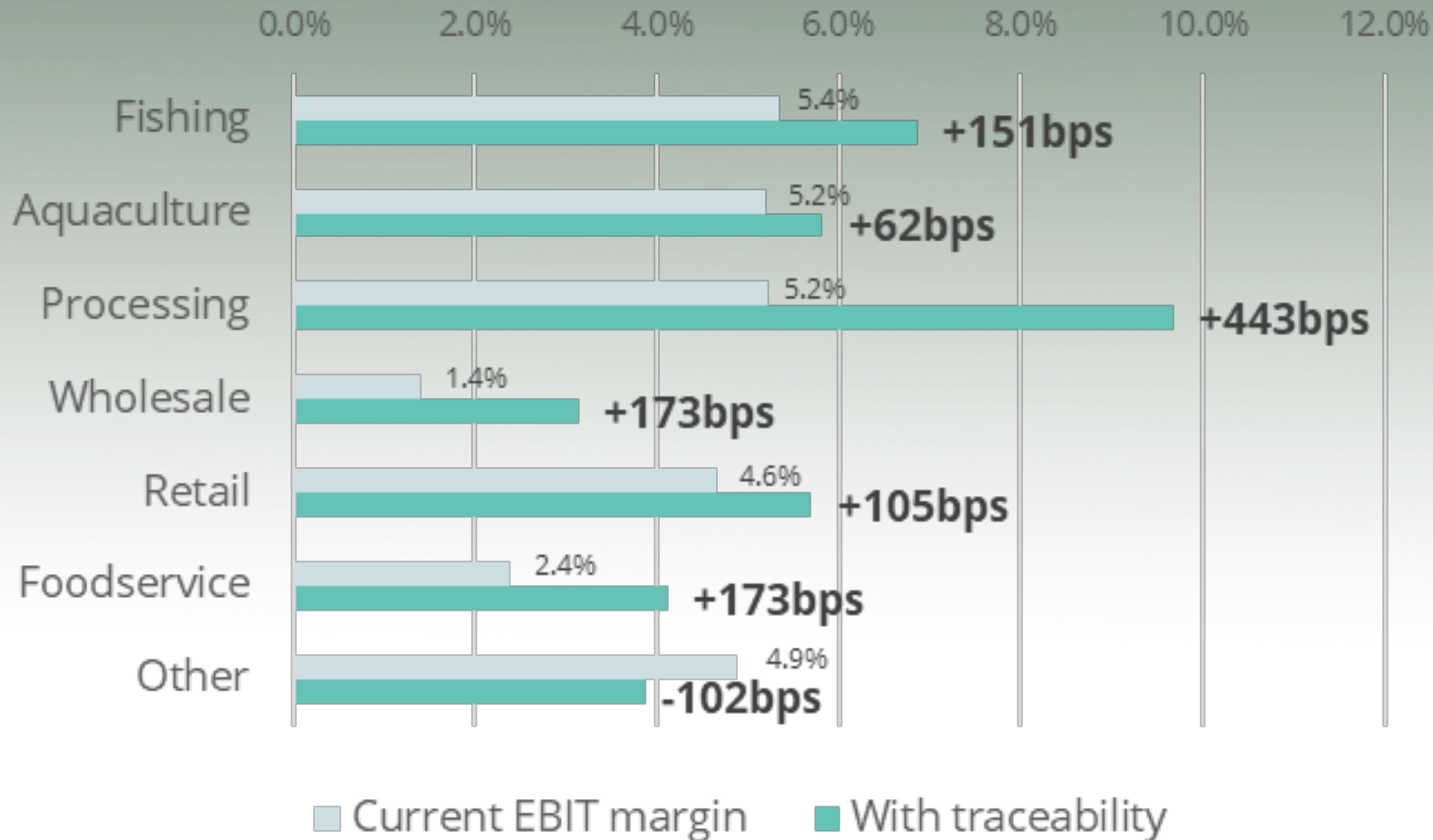
## 3. Financial Benefits of Traceability

# Modelling the benefits of traceability





# Impact of traceability on profit pool



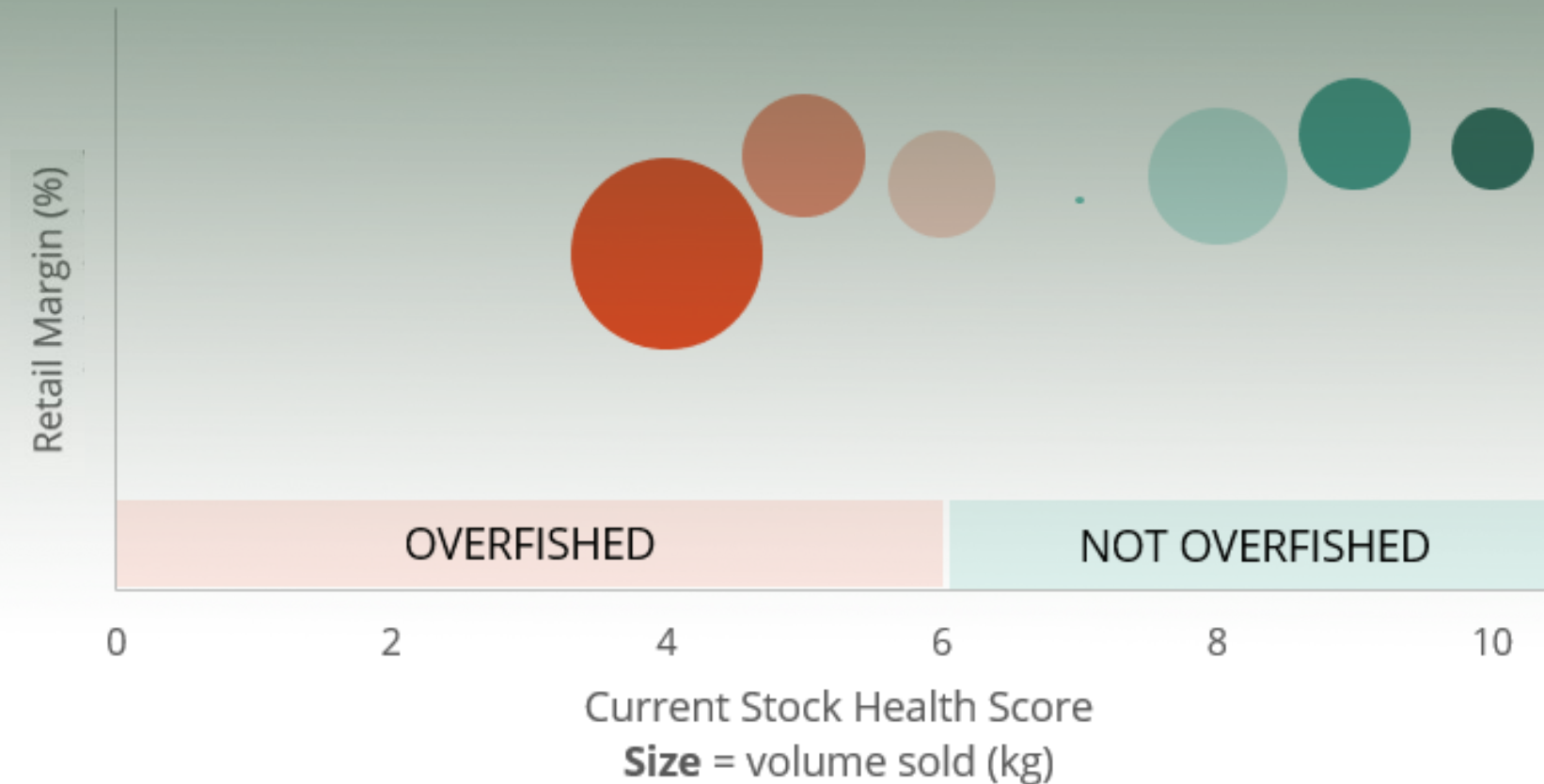
Impact of Seafood Traceability on the Global Seafood Supply Chain EBIT Margin by Sector (Source: Planet Tracker)



## 4. No Transparency without Traceability

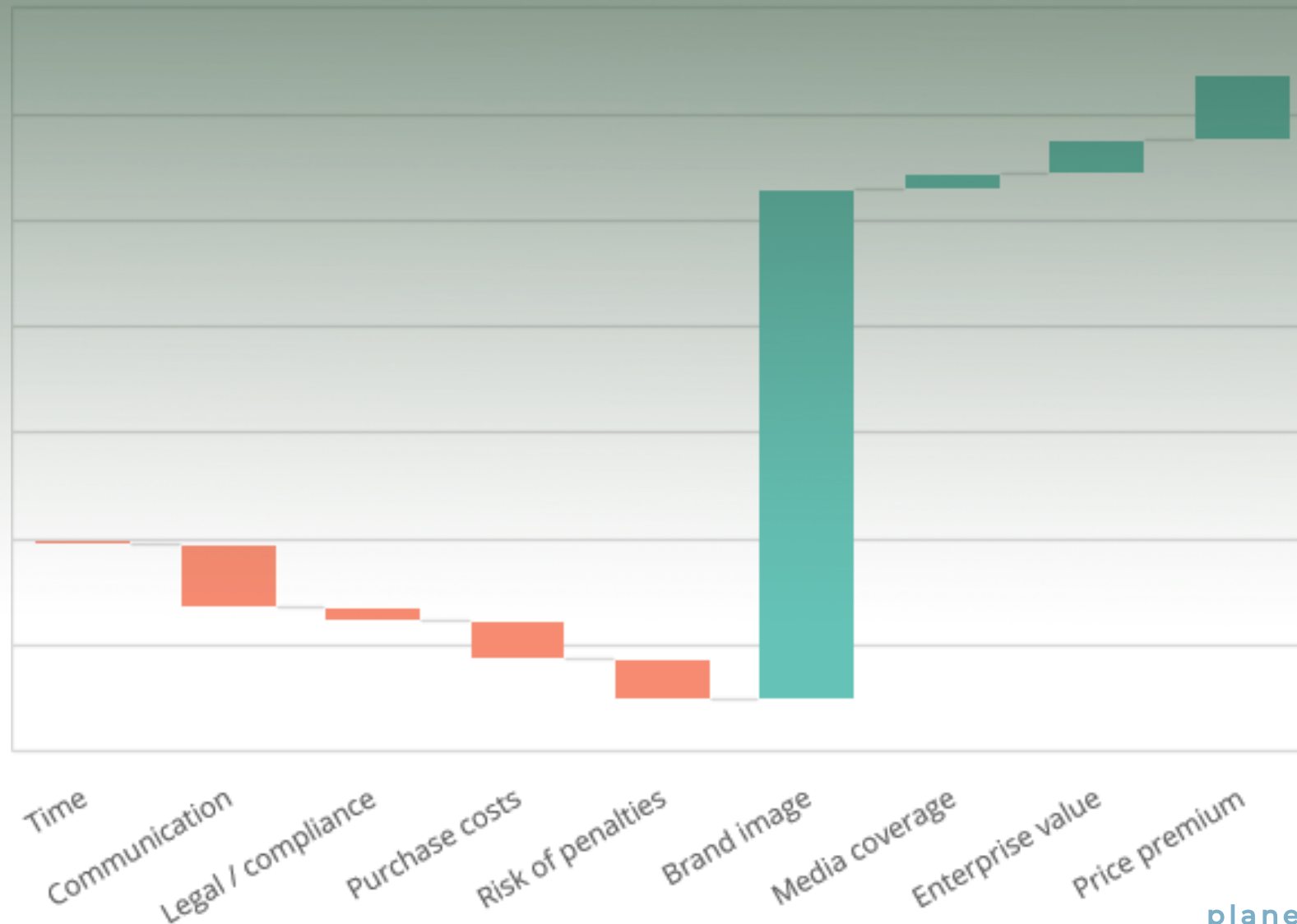


# Traceability enables better management



*Est. 2021 Retail Margin at Carrefour France vs. Current stock Health of Wild-Caught Species as per FishSource (where 10 is the Healthiest)*

# Transparency: a profitable investment







# **5. Unlocking Traceability Opportunities**

# Policymakers can help too

<i>(in USDmn)</i>	Traceability Investment – Fishing Sector only	Fishery Subsidies	Investment as a % of Fishery Subsidies
Asia	952	19,515	5%
<b>Europe</b>	<b>318</b>	<b>6,372</b>	<b>5%</b>
Africa	131	2,099	6%
Oceania	103	807	13%
North America	338	4,866	7%
South America	136	1,688	8%
World	1,978	35,347	6%

Global Fishing Sector - Traceability Investment Needed Compared to Fishery Subsidies  
(Source: Planet Tracker, in USD million)





Planet Tracker

Thank You

[francois@planet-tracker.org](mailto:francois@planet-tracker.org)

This presentation is funded in part by the Gordon and Betty Moore Foundation through the Finance Hub, which was created to advance sustainable finance.



GORDON AND BETTY  
**MOORE**  
FOUNDATION