

# TUNA WARS

Powers Around The Fish  
We Love To Conserve

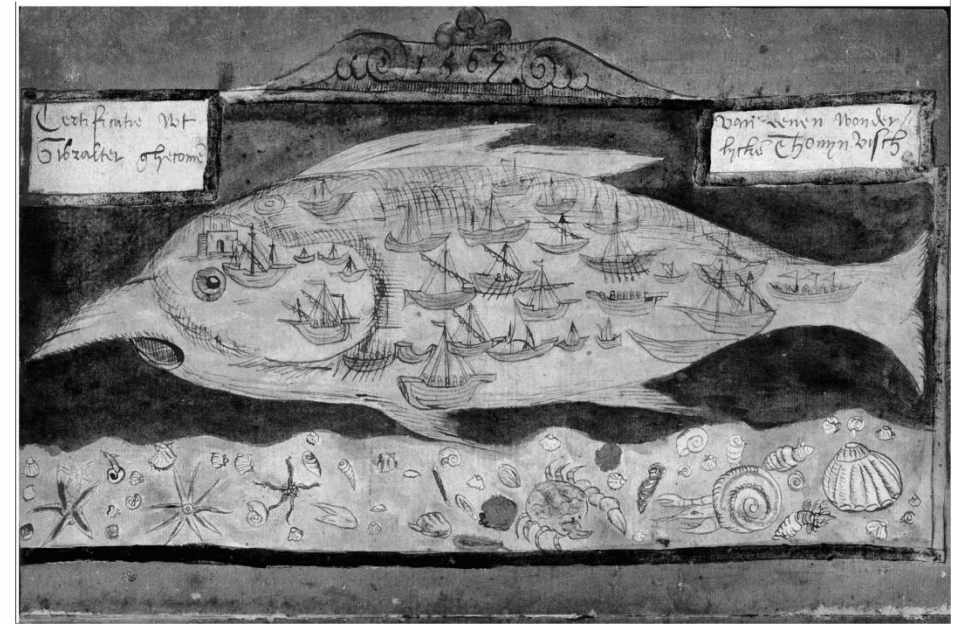
STEVEN ADOLF

## Modern Tuna Wars

Shifting Global Powers  
in the age of sustainability

Steven Adolf, Americas 2020 Tuna Conference

[tunawars.net](http://tunawars.net)



# Modern Tuna Wars, shifting global powers in the age of sustainability

How a wrong sustainability strategy of The Big Three resulted in a serious defeat



# Large scale fisheries started with Bluefin

- Global Large scale fisheries of tuna fisheries started all with tuna, in particular bluefin tuna
- We are talking of a history of thousand of years. The nowadays Almadraba is a vivid memory
- What is now a small niche market, used to be the center of the first boarder crossing world trade
- large scale meant power struggles,





# Classic Tuna Wars

- Punic Wars (264-146)
- Geostrategic supremacy
- Related with trading power
- Barcas Tuna Imperium





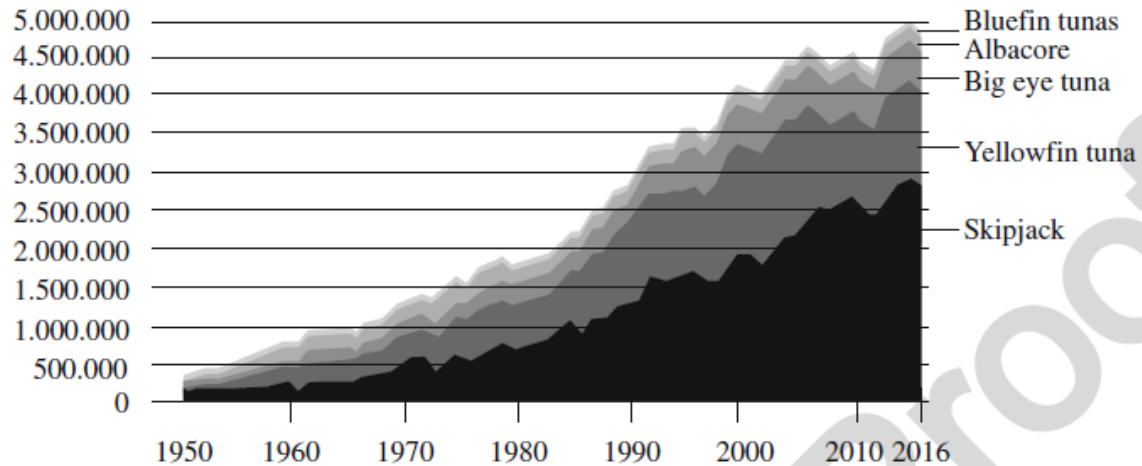
# Spanish Tuna Dynasty



- . Guzman el Bueno (1256-1309)
- . Dukes of Medina Sidonia:  
tuna multinational
- . The destruction of the Armada (1588) started a steady decline of the Almadraba
- . Medina Sidonia Powerhouse ended in 1816

## World tuna catches: Steadily increasing catches for tropical tunas

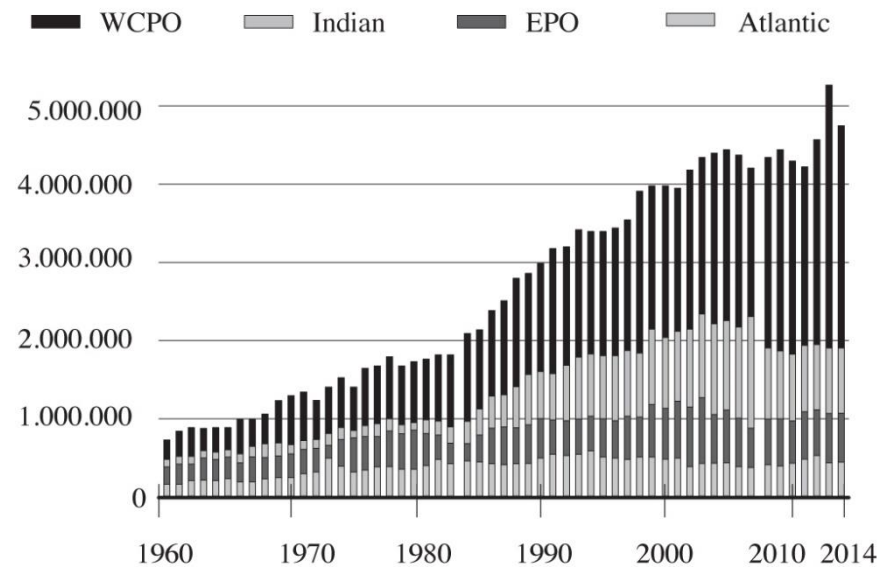
Yearly total tuna catches by species



Source: FAO

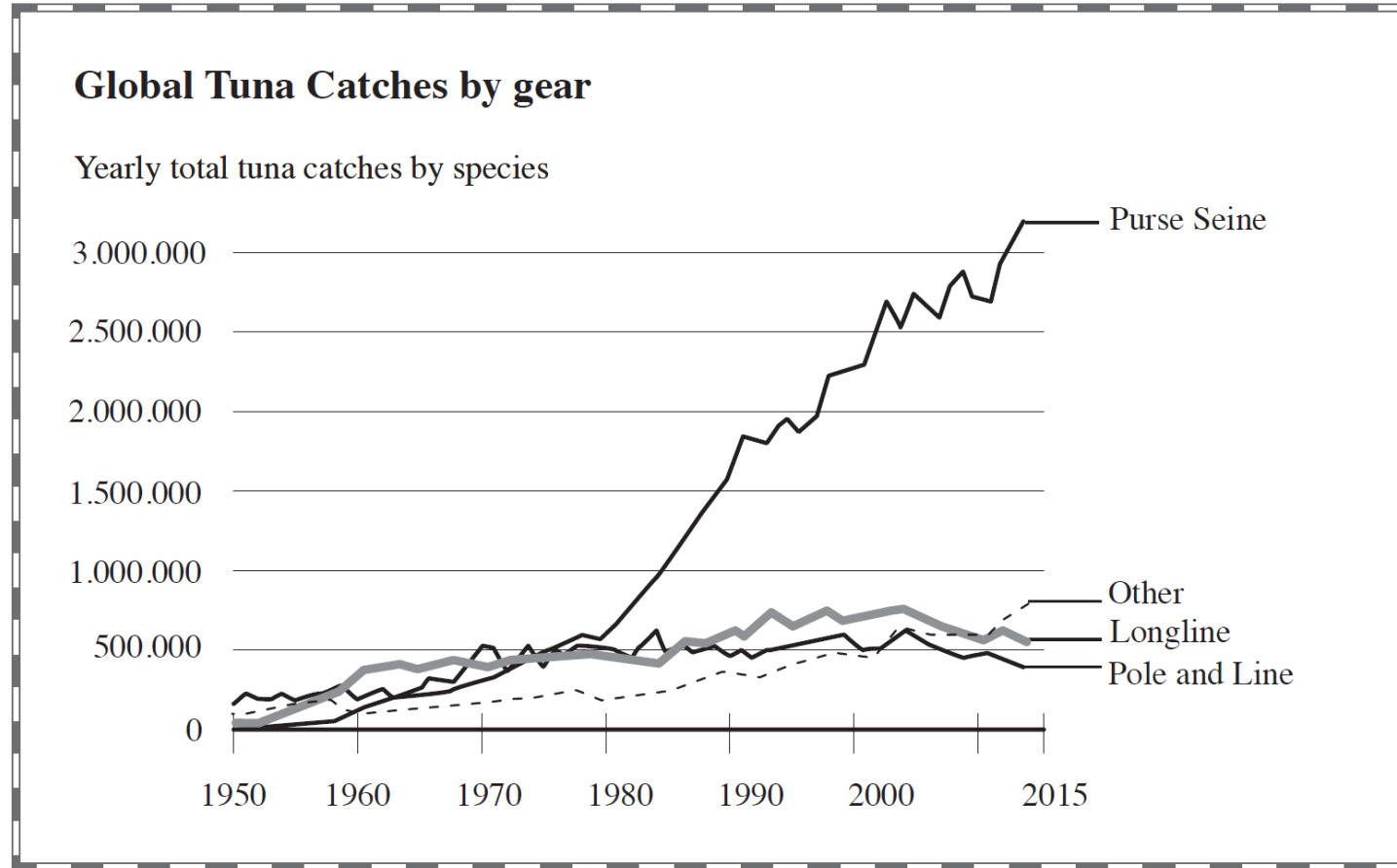
## Modern Tuna world, modern Tuna Wars

### Global Tuna Catches by Ocean



Source: RFMO's

# Explosive catch volumes changed of focus to sustainability

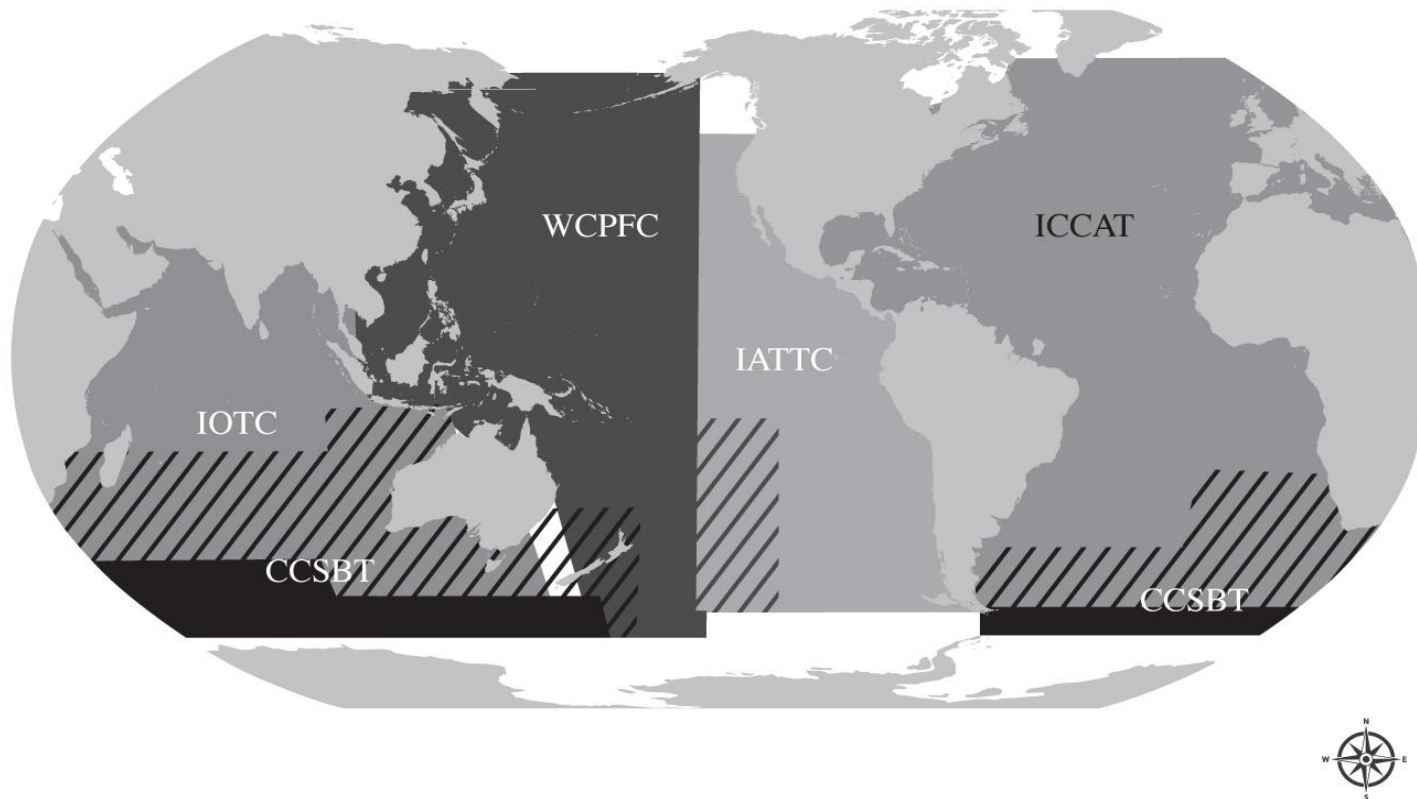


Source: FAO, Fonteneau

# Battle Field 1 : Managing Global tuna, public governance

## The Global management of tuna

Regional fisheries management organizations (RFMOs) in the Oceans





# Battle Field 2: private sustainability claims



# Industry Strategy to solve Wicked Tuna Problems: Become a Flipper Lover

How the Big Three got Dolphin Safe: Better get hold on the sustainability policy,  
before the sustainability policy gets hold on you

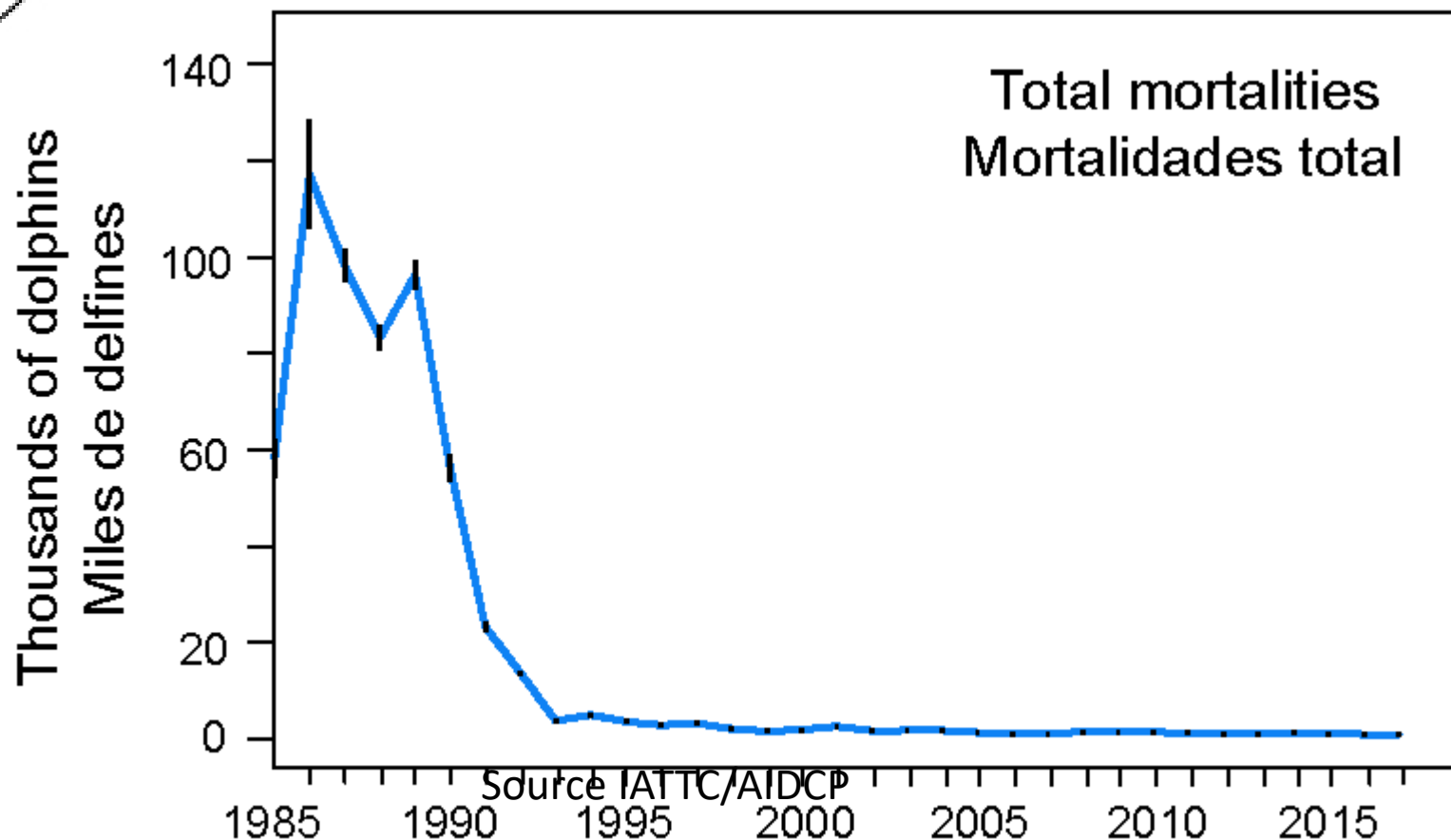


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# Wicked Dolphin Problem solved





# Lethal Weapon in Three Flipper Wars

## Use the Dolphin Safe Certificate

As a marketing tool and as barrier against competition

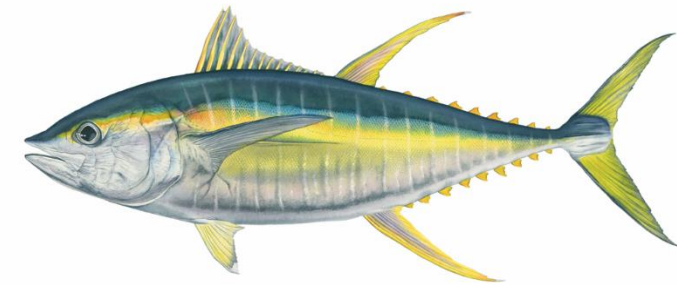
### Flipper War 1

The American fleet concurred the Pacific, obligation the use of Dolphin Safe certificate for all species not related with Dolphin sets. It could have been as well an Elephant Safe Certificate.



### Flipper War 2

Use Dolphin Safe to keeping the Mexican competition out of the US markets



### Flipper War 3

Obstruct the market entrance for more demanding certificates (MSC) and potential strong competition (PNA- Pacifical)



# Backfire: Large claims against conspiracy can bring companies down



## Class Action Law Suit Price fixing Conspiracy

\$2, 5 bln claims brought Bumble Bee on the edge of bankruptcy. Take-over by FCF. Severe damage to Starkist and CoS. Asian Power shift complete (Thai Union-CoS, Dongwon-StarKist)

## Class Action Law Suit Consumer Fraud-Unfair Competition

More claims?  
Severe damage companies and certification.

Warning: the strategy of not taking sustainability claims seriously can severely damage the health of your company

# Where end common sustainable strategies and start conspiracy and blocking fair competition?



Announced that members can do only business with other 'sustainable' ISSF members

New 'sustainability' claim on social responsibility to close EU-market



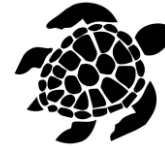


# Meanwhile: What is sustainable?

- Not overfishing the tuna population
- Not damaging the ocean environment
- Good stock management rules, harvest strategies
- Minimalize bycatch
- Management of FADs
- No Illegal, unregistered and unreported tuna (IUU, fraud)

## More To come

- Social Responsibility
- Minimal Carbon Footprint
- Tuna welfare



# Some Challenges in Sustainable Tuna Wars

## On Private sustainability claims

- Mitigating risks of lesser quality claims: Dolphin Safe, FAD-free, FIPs. (Benchmarking)
- Awareness of Conspiracy risk
- Improving transparency and traceability of the chain.

## On public RFMO policy level

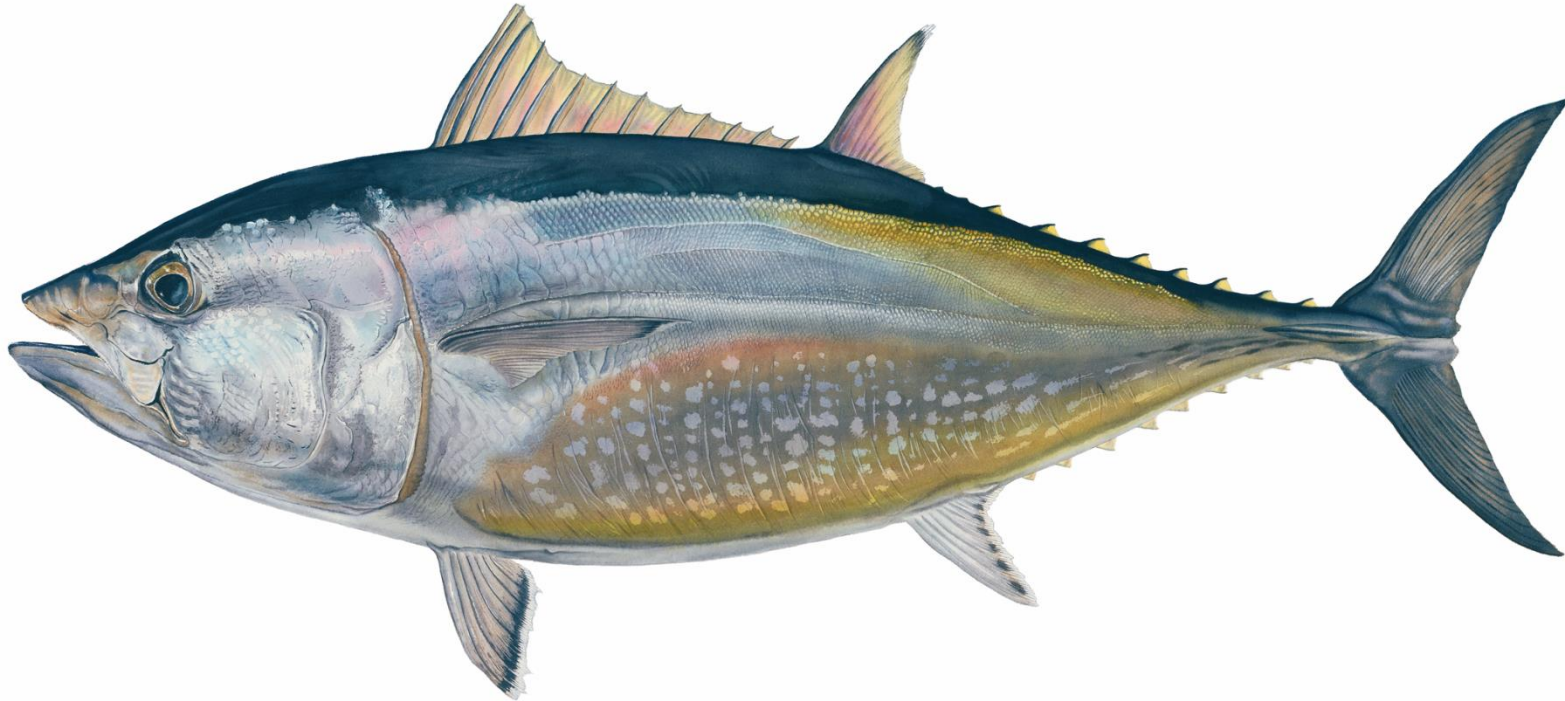
- enforce stronger IUU policies
- enforce FAD management
- create Harvest Strategies

## More:

- Coordination food safety standards, banning color treatments
- More emphasis on strategic responsibility retailers, traders
- better science with more data. Precautionary policies: so far, Science does not deliver certainties



**In Modern Tuna Wars sustainability matters:  
It has a risk and it has a price tag**



Book and Blog [www.tunawars.net](http://www.tunawars.net)