



 Planet Tracker
**The Financial
Benefits of Seafood
Traceability**
4 November

THE FINANCE HUB

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

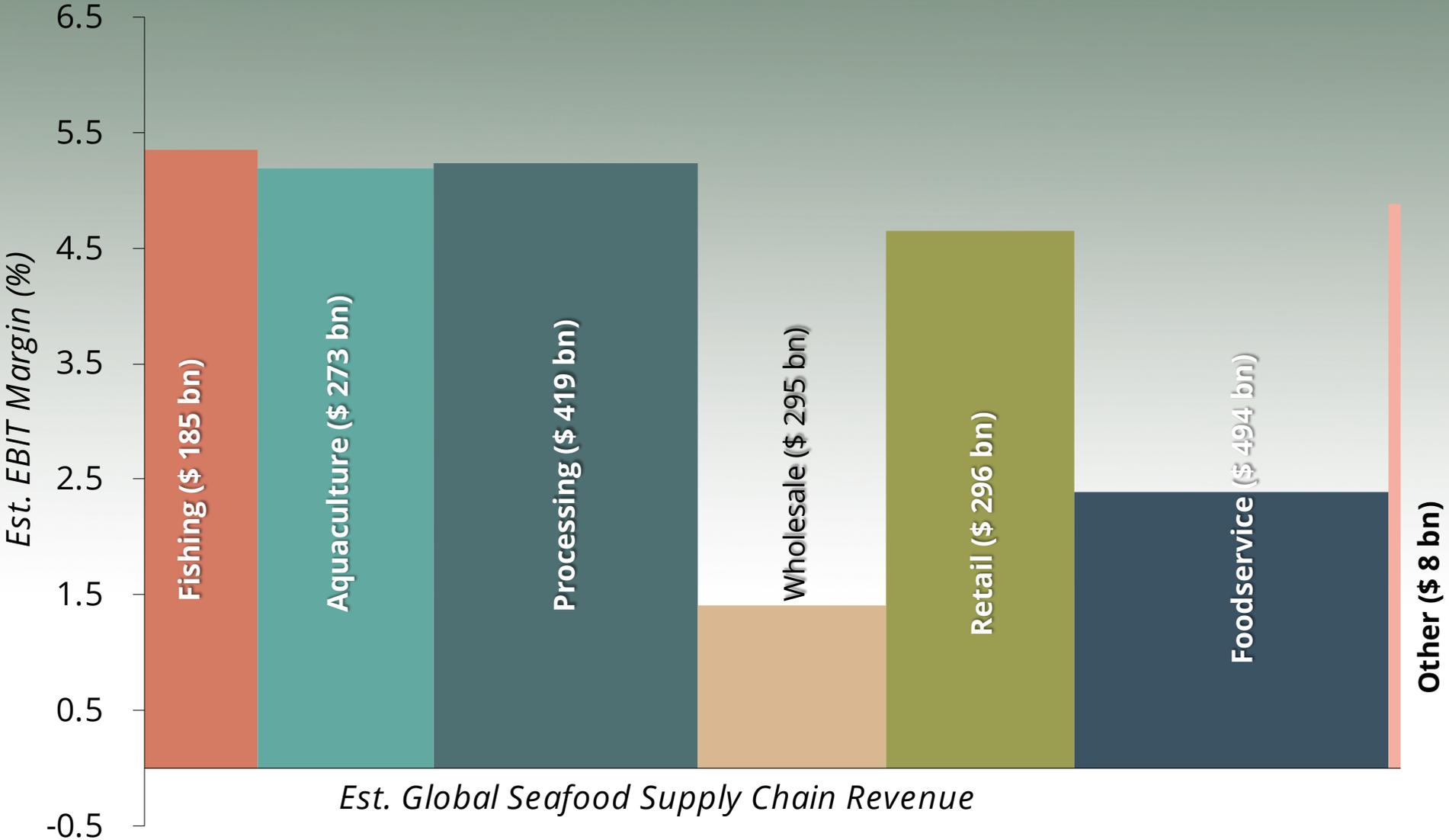
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Tracker Group Limited





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

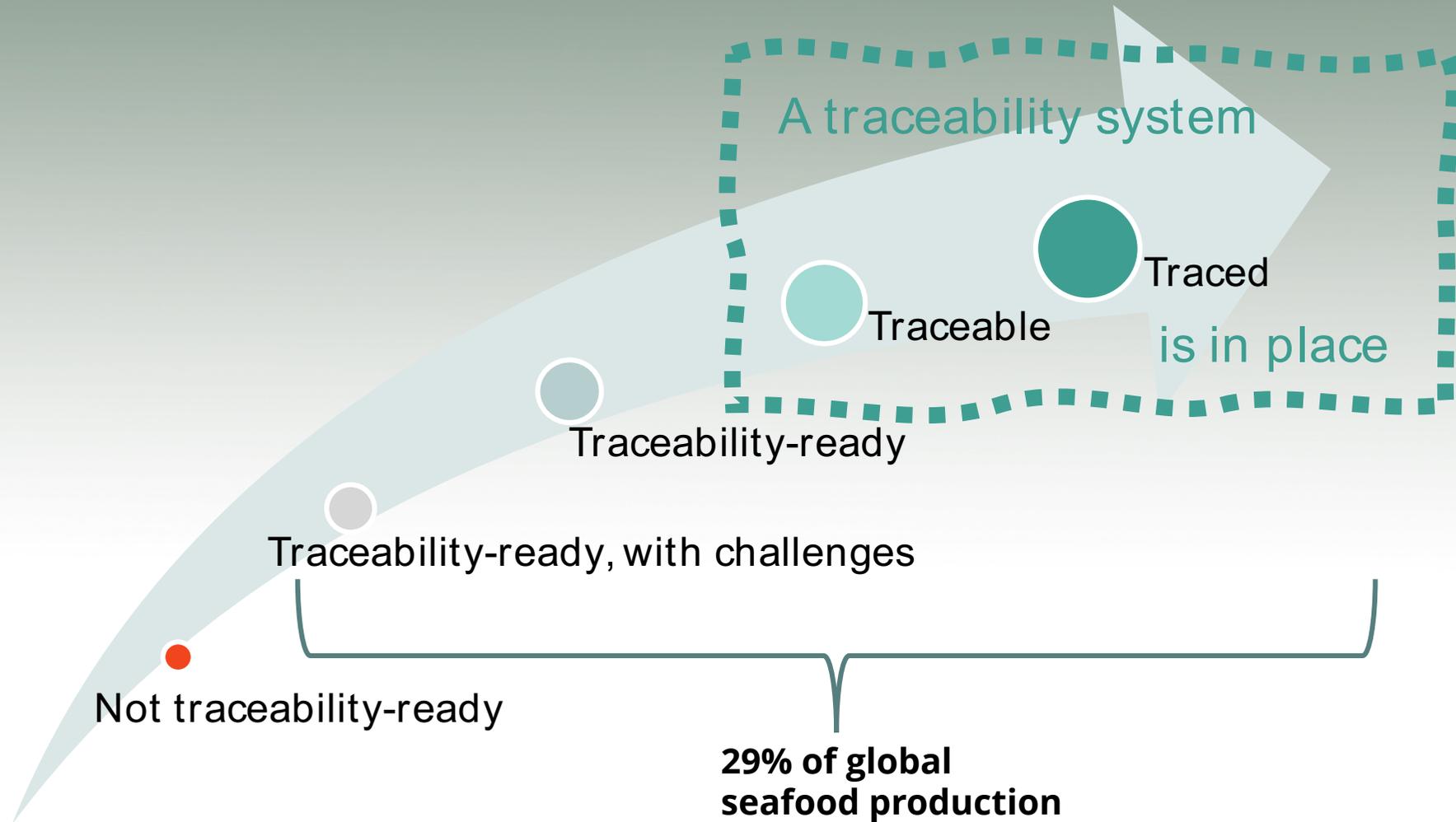


Split of the Global Average Retail Value ex VAT of 1 Kg of Wild-Caught Seafood (Source: Planet Tracker)

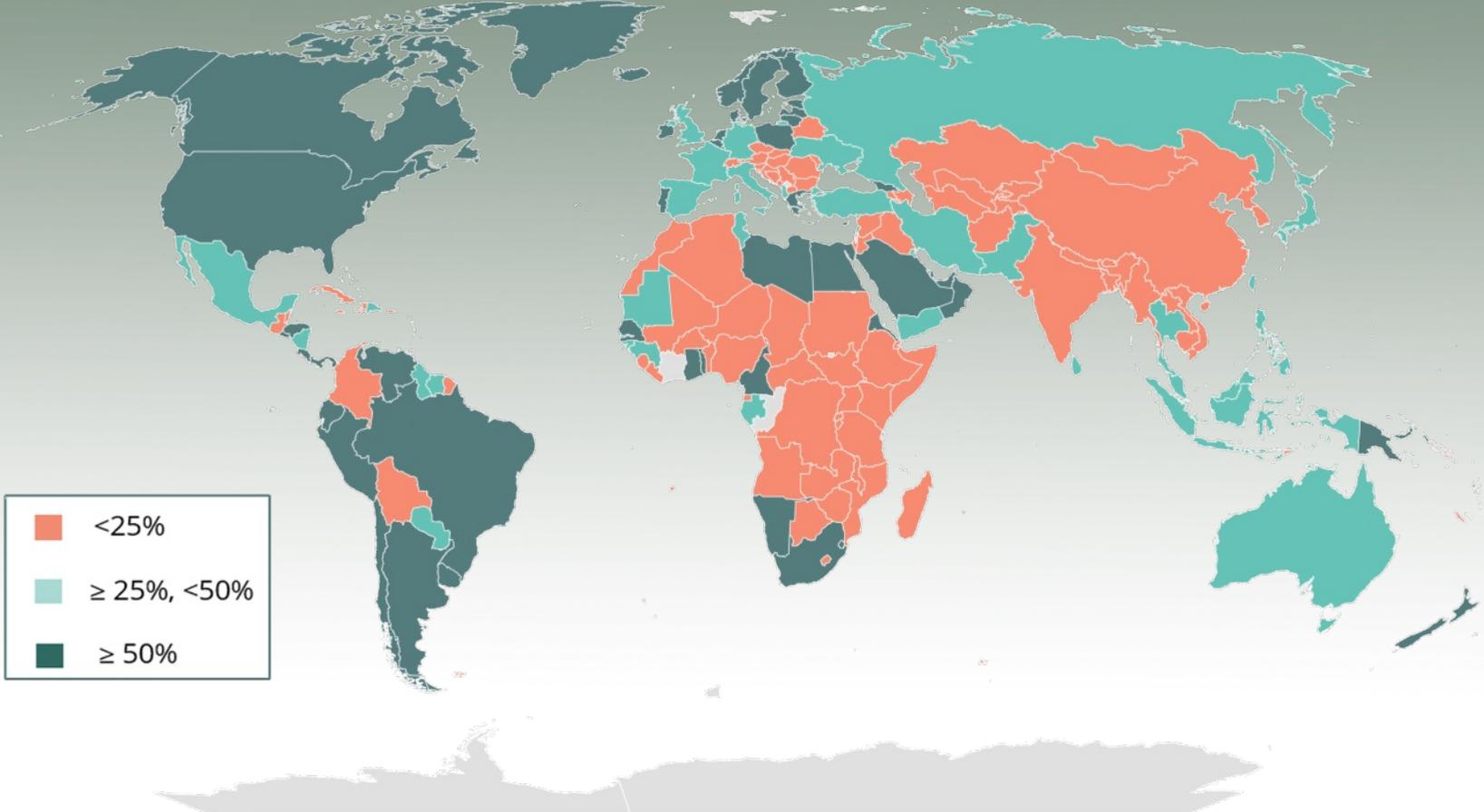


2. Fully Traceable Seafood Supply Chains?

Introducing traceability readiness



Traceability readiness by country

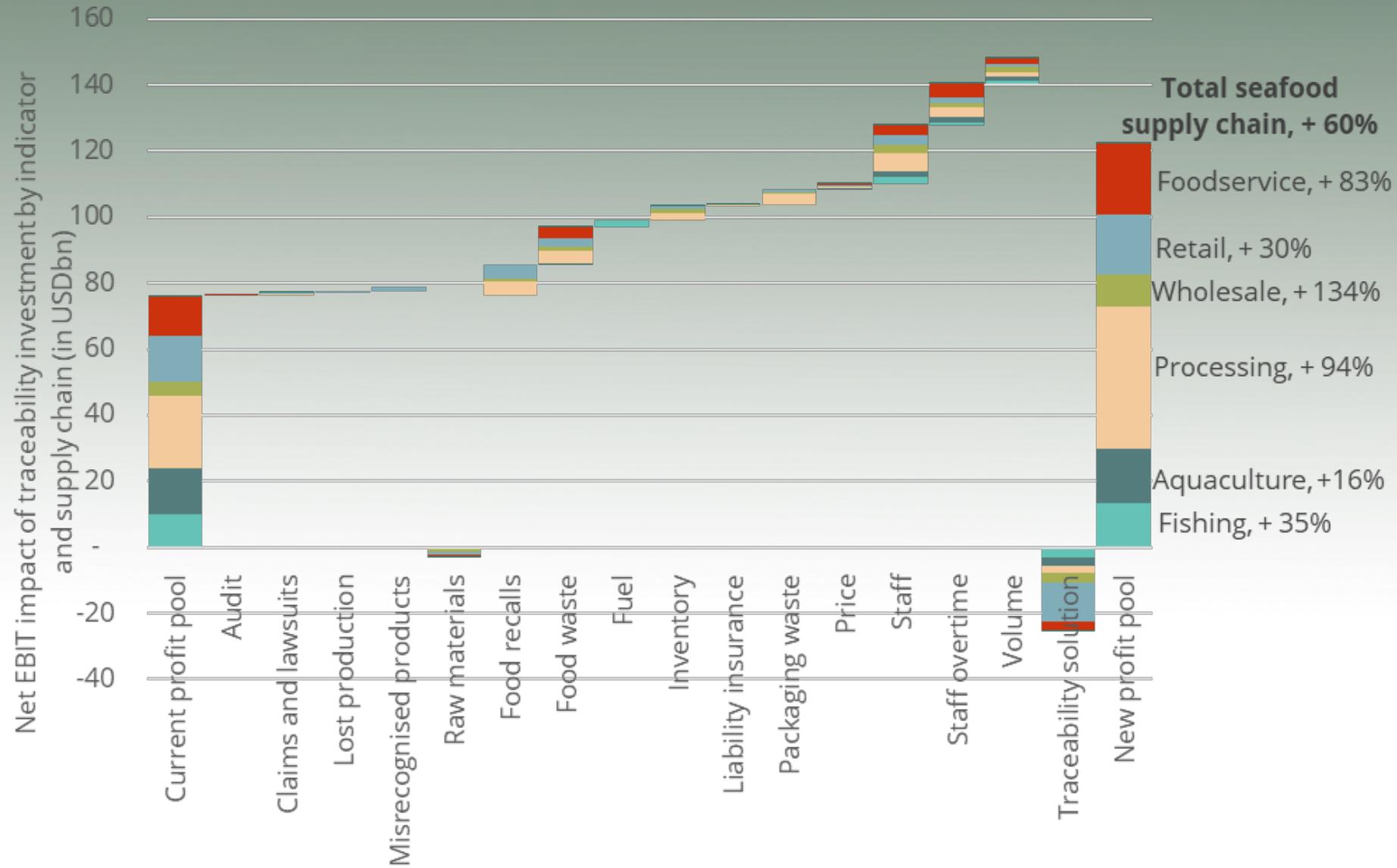


Proportion of National Seafood Production that is Traceability-Ready (Source: Planet Tracker)

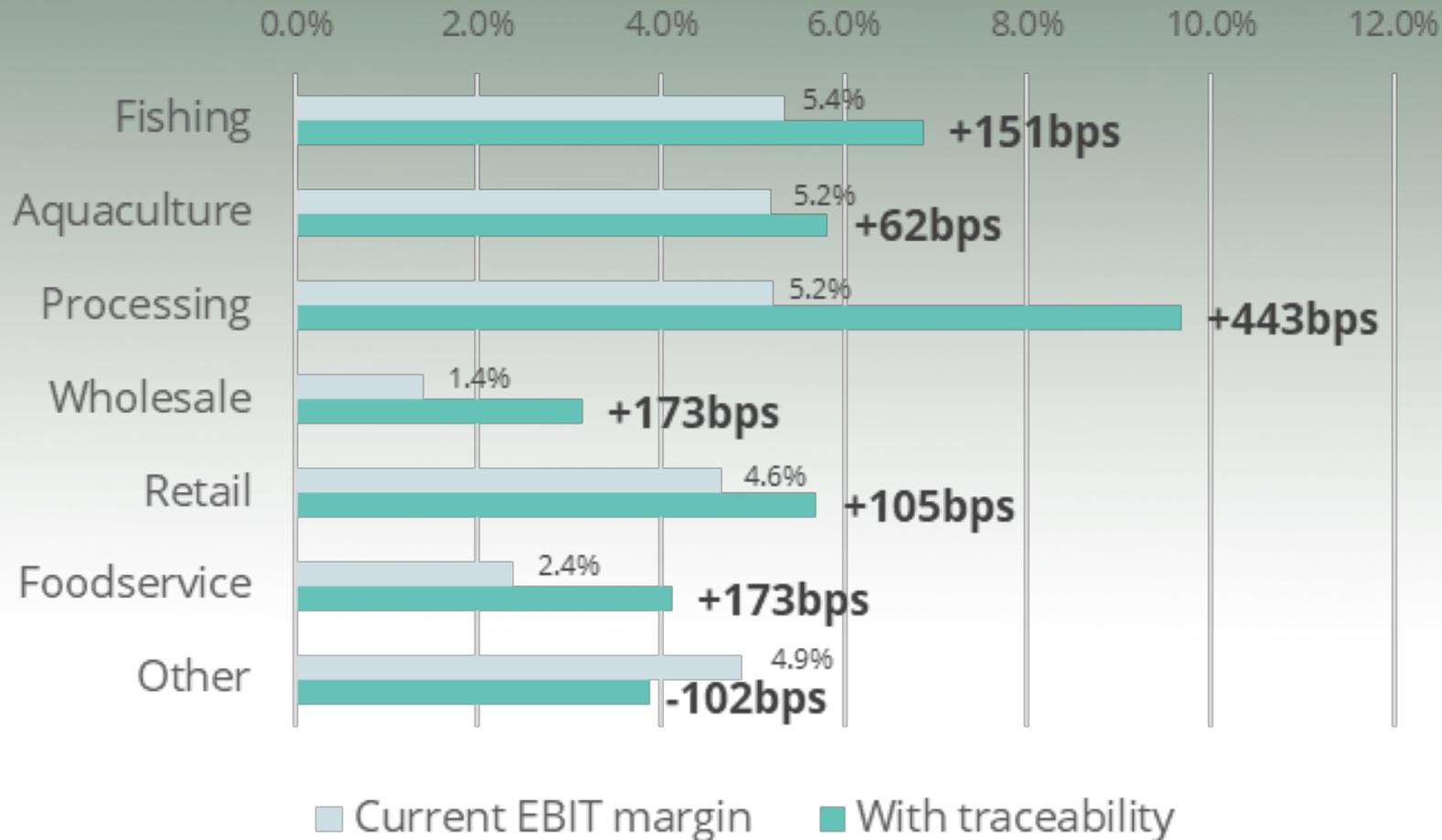
The background of the slide is a photograph of a vast, deep blue ocean with white-capped waves. In the upper left corner, there is a graphic element consisting of several overlapping, semi-transparent green circular bands that curve across the top of the image. The sky is a pale, hazy blue with soft, white clouds.

3. Financial Benefits of Traceability

Modelling the benefits of traceability



Impact of traceability on profit pool

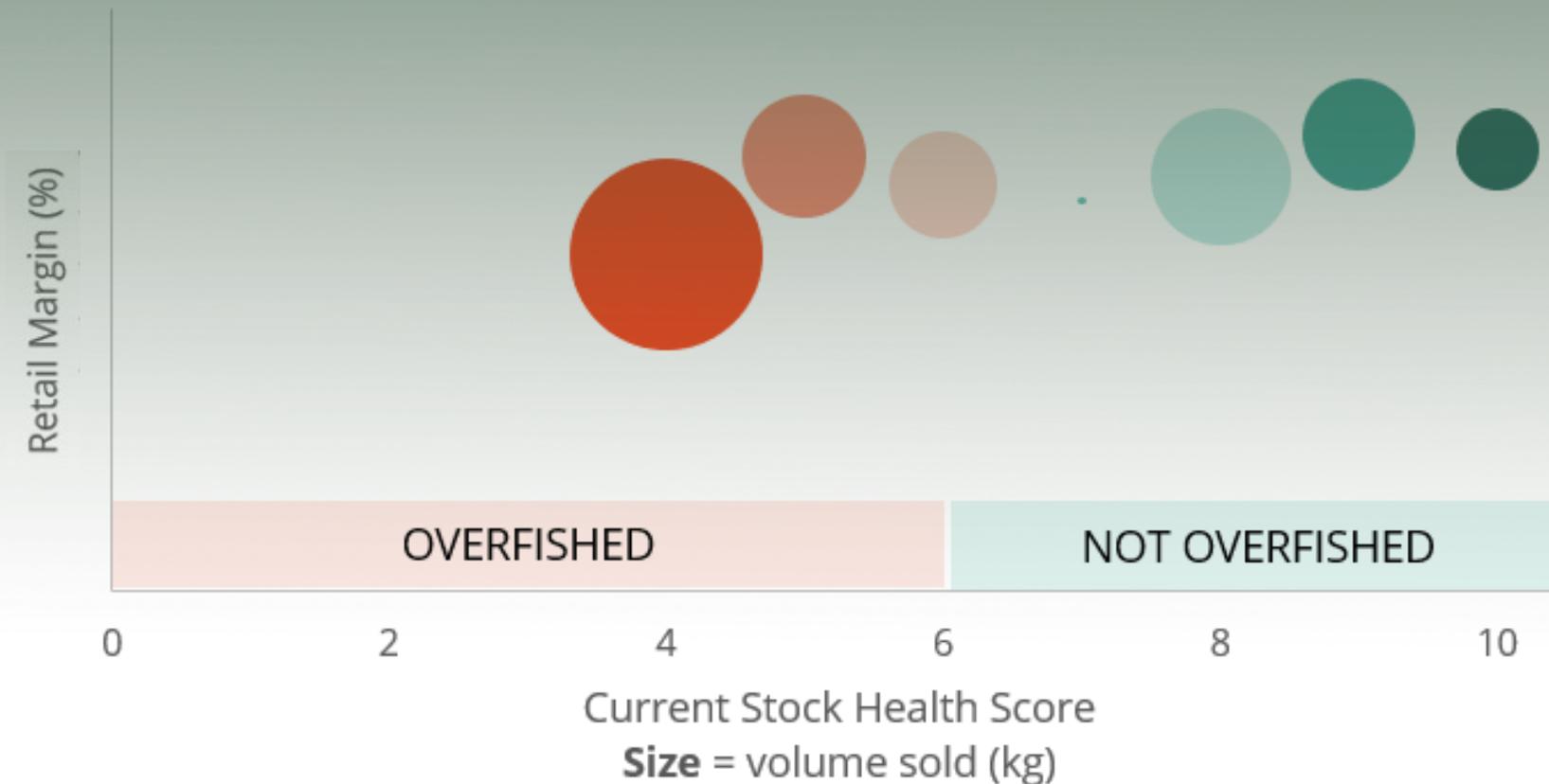


Impact of Seafood Traceability on the Global Seafood Supply Chain EBIT Margin by Sector (Source: Planet Tracker)



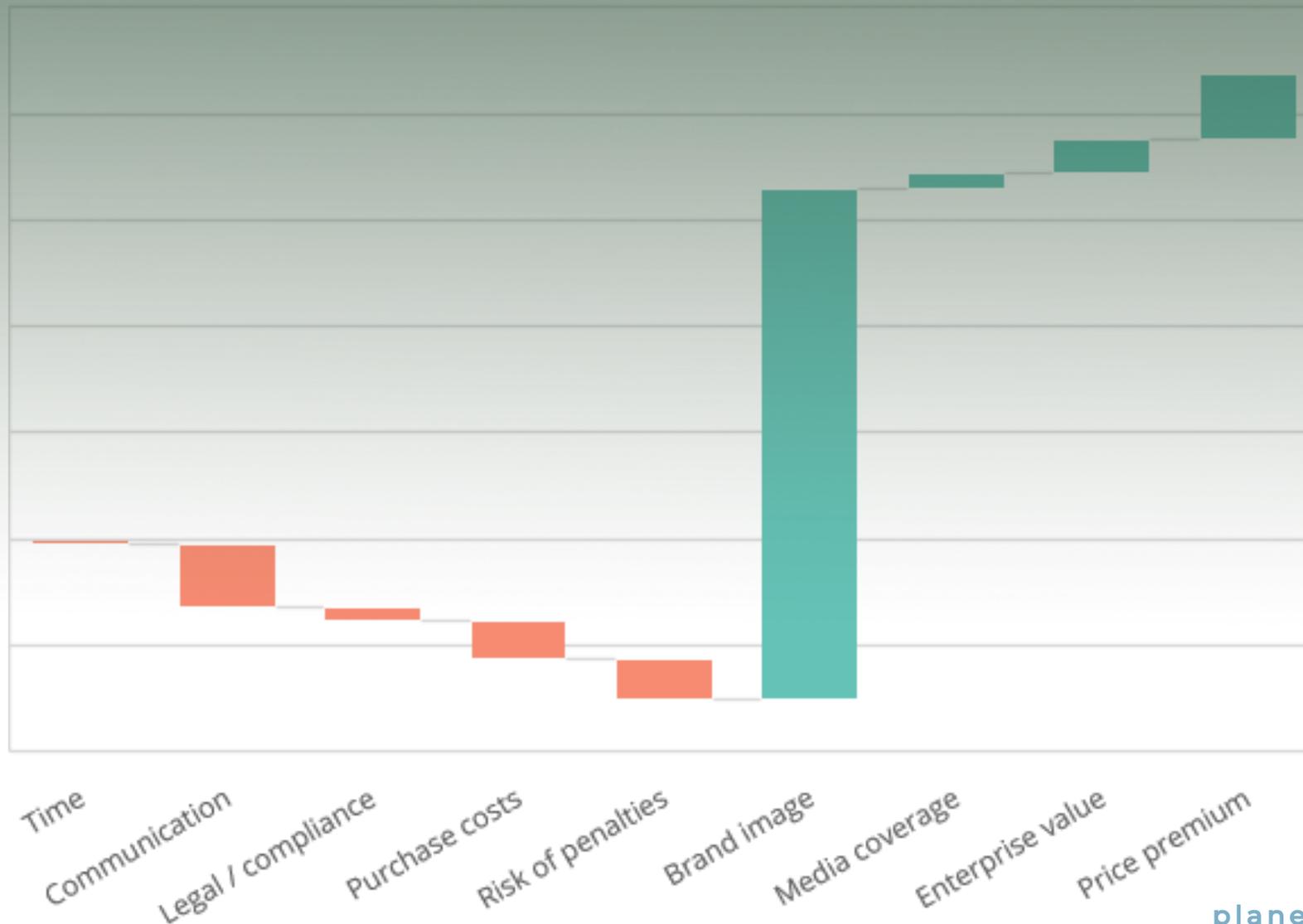
4. No Transparency without Traceability

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



The background of the slide features a deep blue ocean with white-capped waves. In the upper left corner, there are several overlapping, semi-transparent circular shapes in shades of light blue and teal, creating a modern, abstract design. The sky above the horizon is a pale, hazy blue with soft, white clouds.

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%
Europe	318	6,372	5%
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

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