



Oceana Request for Proposals: Economic valuation of the global market for blue shark products and interdependent policy analysis for sustainable management and trade

A [Nature analysis](#) published in 2021 revealed that three-quarters of oceanic sharks and rays are threatened with extinction. However, functioning global management of shark catch (targeted or as bycatch) is conspicuously absent. In international waters, RFMOs have broadly failed to heed scientific advice to develop shark catch and bycatch limits, with the exception of [ICCAT, which set catch limits for blue sharks](#) in 2019. Within EEZs, particularly in developing coastal states hosting distant-water fishing (DWF) fleets, governments (with few exceptions) have been unable to adequately monitor and manage shark catch. Meanwhile, a high-value global industry in shark products continues unabated. The global shark fin trade is valued at [USD \\$400 million per year](#) despite declining trade volume since the early 2000s. At the same time, the value of the shark meat trade has dramatically increased, with a recent [WWF report](#) (July 2021) stating that the value of shark and ray meat between 2012 – 2019 (USD \$2.6 billion) exceeded the value of shark fins (USD \$1.5 billion).

Amongst commercially exploited species, blue sharks are one of the most fecund and globally abundant sharks. However, the population trend is decreasing, and the IUCN now categorizes the global population of blue sharks as “Near Threatened,” and the Mediterranean population as “Critically Endangered”. They are also the most frequently captured shark in pelagic fisheries, with an estimated [20 million killed annually](#), and are the world’s most traded shark, comprising [up to 64%](#) of the fin trade (current meat trade value is unknown). Yet, a full economic valuation of this commercially exploited shark species has never been done.

The purpose of this study is threefold: a) obtain a first-ever economic valuation of blue shark to recognize its importance within the global shark products trade; b) identify the gaps in governance and regulatory frameworks managing blue shark catch and trade; and c) detail the conservation implications on the global shark fin, shark meat, and shark by-products trade arising from the current state of blue shark catch management (or lack thereof).

The consultant will deliver a report that addresses these three issues, including:

- ✓ an estimate of the global commercial value of all blue shark products;
- ✓ an analysis of existing policies, implementation of those policies, and gaps in existing policies for achieving sustainable production;
- ✓ a landscape analysis that documents key actors and identifies potential leverage points in the realms of economics-influenced politics, fisheries management, and trade;
- ✓ and recommendations for pragmatic conservation and trade policies/measures that can ensure blue shark populations are abundant and sustainably managed.

Please find a proposed set of research questions below:

Research Agenda 1: Valuation of global blue shark trade

- What is the volume of blue shark landings by origins (ocean basin and key catch locations), by management entity (RFMOs or country jurisdiction), and fishing flag? How does this data compare to other highly-traded shark species?
- What is the global breadth of blue shark trade (mapping the volume and value of shark products through import, export, and re-export locations)?
- What is the estimated value (for key products – meat, fins, and other) of blue sharks globally and by country/region?
 - What are the dock/first sale ex-vessel values of blue sharks?
 - What are the consumed end values of the product types?
- How have the different product sectors of the market changed over time in volume, value, origin and destination, and what have been the main drivers of those changes?
- Where do gaps in data, identified by comparing trade and catch data, point to potential suspicious activity, including corruption, fraud, and laundering of IUU product?

Research Agenda 2: Impact of fishing sector on blue shark abundance

- What are the characteristics of the blue shark fishing sector (i.e., industrial vs small scale fisheries, domestic vs distant-water fishing (DWF), key companies, and key vessel flags involved)?
 - What is the percentage of large-scale to small-scale fishing in the blue shark industry?
 - What is the percentage of DWF in the blue shark industry?
 - How would you characterize each of these sector's role and contribution to the shark meat and shark fin commodity chains within the blue shark trade network?
 - What are the gear types used in the various sectors?
 - What are the target species for the gear types?
- Where does the fishing occur, and under whose jurisdiction?
 - What percent of catch is coming from the high seas and distant water fishing vs. domestic waters?
- Who are the biggest fleets catching blue sharks?
 - What are the most prominent vessel flags catching blue sharks?
 - What are the key companies catching blue sharks?
- How has the share of blue shark catch relative to other target species, e.g., swordfish and tuna, changed over time for the main fleets?

Research Agenda 3: Review of policy and associated catch and bycatch measures for blue sharks

- Survey past and existing conservation measures for blue shark catch management (whether targeted or as bycatch), product trade, and habitat protection.
 - Identify relevant treaties, e.g., CMS, CMS Sharks MoU, CITES, PSMA, and regional agreements such as USMCA and CPTPP, and any others.

- Identify the blue shark-relevant fisheries management, species/seafood trade, and habitat protection measures at the national, regional, and international level including but not limited to:
 - Shark finning bans/regulations
 - Catch management measures (input or output controls)
 - Bycatch measures
 - Import/export measures, such as prescribed by CITES, EU's IUU Fishing Regulations, and US Seafood Import Monitoring Program
 - Shark sanctuaries and protected areas management
- Review scientific recommendations from blue catch stock assessments and bycatch working groups to the relevant RFMOs, whether they were adopted and how long it took for implementation to occur.
- Are there contradicting measures that may increase vulnerability for sharks (e.g., food consumption measures that promote blue shark catch)?

Research Agenda 4: Analysis and recommendations

- Using the findings and results of Research Agendas 1, 2, and 3, provide an analysis of existing policies, their implementation, and their completion for achieving sustainable production (defined as MSY or best available metric for the purpose of this analysis).
- How do the fin trade and growing shark meat trade networks play into/affect the management of blue shark catch?
- Does the trade of any other blue shark product (i.e., liver oil, cartilage...) play into the demand for blue shark catch and in turn affect its management?
- Provide a landscape analysis to document key actors (including companies along key supply chains, management bodies, trade bodies, and fishing flag states) and identify potential leverage points in the realm of economics, politics, fisheries management, and trade.
- Provide recommendations for policies and pragmatic measures that ensure blue shark populations are biologically abundant and are sustainably managed. Recommendations should be broken into the following categories: data collection/science, management and conservation, control and enforcement, and trade, and with specific regard to actors, such as international organizations, national administrations, industry, or NGOs.

Contract Details

The study will take place from January 2022 – September 2022. We anticipate the need for an interdisciplinary team with expertise in seafood trade, marine conservation, fisheries management, fisheries economics, seafood supply chains, and political science. We welcome a proposal that breaks the work into phases with anticipated dates for delivery of associated drafts. The final deliverable will be a report submitted electronically to Oceana. This report is due to Oceana by September 5, 2022. Oceana expects that the consultant will communicate on an ongoing basis with Oceana about the progress of the analysis and answer our related questions on these topics during the study process.

Your Oceana point of contact during the process will be Jillian Acker, Research Associate – Science and Strategy, at jacker@oceana.org. A schedule of regular updates will be

discussed with finalists. **Proposals should be sent to Jillian Acker by December 20, 2021.** Proposals will be reviewed on a rolling basis, as received. Please feel free to contact Ms. Acker to discuss your proposal prior to submission.

Timeline and Planning

Timeframe for Project

Proposal Process:

- December 20, 2021 (on or before) – Proposals due from potential consultants
- January 7, 2022 – Consultant selected by Oceana
- January 21, 2022 – Contract awarded, and consultancy begins

Approximate Consultancy Timeline:

- Week of January 17, 2022 – Project kick-off call/meeting
- Monthly progress report phone calls/meetings
- August 15, 2022 – First draft of report due
- Week of August 22, 2022 – Phone call/meeting to discuss draft
- Revisions and refinement of report
- September 5, 2022 – Final report due
- Week of September 12, 2022 – Final wrap up call/meeting

Contract amount

Negotiable – Please include your estimated fee for the project in your proposal. If you are proposing a phased approach, include the fees for each portion of the work separately.

Proposal Content

Please include a 1.) a statement of your qualifications for this research; 2.) a description of your research approach and 3.) an outline of the scope of work.