

ANNUAL REVIEW

2025



SADSTIA
South African Deep-Sea Trawling Industry Association

**UNLOCKING THE VALUE OF
THE CAPE HAKE RESOURCE**



www.sadstia.co.za

THIS **ANNUAL REVIEW** **DETAILS EVENTS** IN THE CALENDAR **YEAR 2025**

*Several photographs in this Annual Review
were taken by the skippers of fishing vessels.
Cover photo: Sean van Zyl, Skipper of Andromeda
This photo: Patrick Lakay, Skipper of Casablanca*



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ABBREVIATIONS

BSL	Bird scaring line
CAB	Conformity Assessment Body
DFFE	Department of Forestry, Fisheries and the Environment
ELO	Environmental Liaison Officer
ETP	Endangered, threatened and protected (species)
FoodBev SETA	Food and Beverage Sector Education and Training Authority
MPA	Marine protected area
MSC	Marine Stewardship Council
OSF	Ocean Stewardship Fund
SAEON	South African Environmental Observation Network
SAMTA	South African Midwater Trawling Association
SANBI	South African National Biodiversity Institute
SASSI	South African Sustainable Seafood Initiative
SMA s	Seabed management areas
SECIFA	South East Coast Inshore Fishing Association
TAC	Total allowable catch
VME	Vulnerable marine ecosystem
WTO	World Trade Organization

FOREWORD

Since long-term fishing rights were allocated to the deep-sea trawl fishery in 2022, six new vessels valued at approximately R600 million, have entered the fishery. This level of investment goes beyond fleet renewal. It reflects strong shareholder confidence in the future of a fishery that is tightly regulated, comprehensively audited by independent certification bodies and integrated into some of the world's most demanding seafood markets.



INNOCENT DWAYI
CHAIRMAN

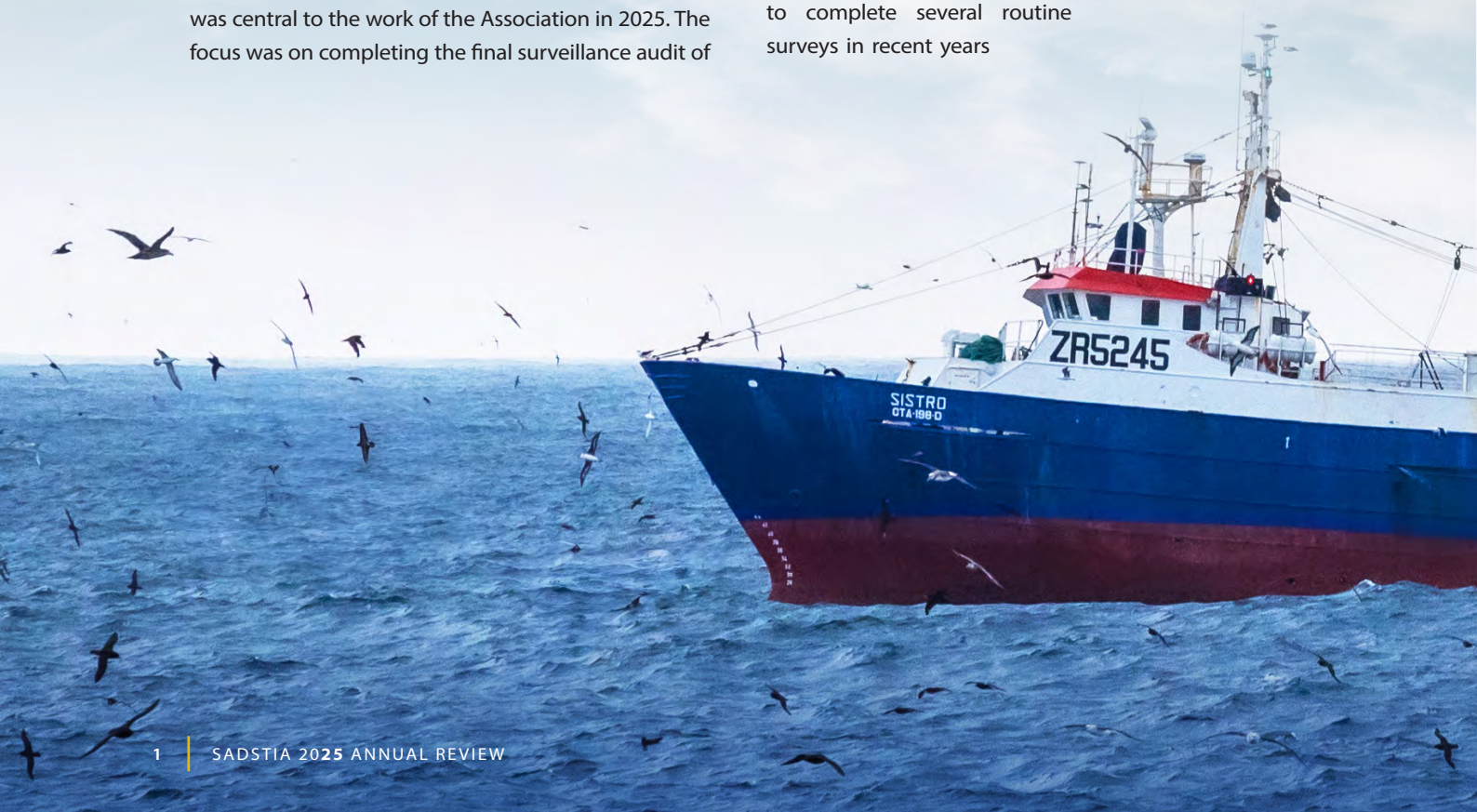
SADSTIA actively encourages investment in fleet modernisation because it enables right holders to operate more safely and efficiently, while strengthening the fishery's ability to meet its sustainability commitments and remain globally competitive.

It was encouraging to see an upturn in commercial catch rates in 2025. Evidence of a stronger resource is significant because it reflects the sustained investment SADSTIA makes in scientific research and sustainability initiatives, including the self-monitoring programme that was successfully launched during the year.

Certification by the Marine Stewardship Council (MSC) was central to the work of the Association in 2025. The focus was on completing the final surveillance audit of

the 2021–2026 certification period and preparing for re-certification. As SADSTIA sets its sights on securing a fifth certification for the South African trawl fishery, it is clear that the MSC eco-label provides members with a strong competitive advantage, opening access to international markets that would otherwise be difficult to reach. The Association's continued investment in science, monitoring and verification reflects its ongoing commitment to maintaining the MSC standard.

Despite SADSTIA's significant investment in science, challenges related to the state-owned research vessel, *Africana*, persist. The vessel has been unable to complete several routine surveys in recent years



due to breakdowns and other operational constraints. Delays in survey execution undermine the management of the trawl fishery for hake and threaten MSC certification. SADSTIA continues to engage constructively with the Department of Forestry, Fisheries and the Environment (DFFE) and other government stakeholders to resolve these challenges and restore a regular survey programme.

Over many years, SADSTIA has built and maintained a strong profile within government and business circles. This engagement predates the allocation of long-term rights and continues to be strengthened. The appointment in 2025 of Loyiso Phantshwa as Stakeholder Manager reflects SADSTIA's commitment to deepening engagement across all three spheres of government, as well as with industry bodies such as FishSA and Business Unity South Africa. A key objective is to ensure that the deep-sea trawling industry speaks with a unified voice, and that all right holders, regardless of size, are able to contribute meaningfully. By collaborating with stakeholders on cross-cutting issues such as tax rebates and fleet modernisation, both the Association and its members are better positioned to address shared challenges. Maintaining a visible, constructive presence, including engagement with Parliament, is essential to advancing the interests of an industry that plays a vital role in coastal employment and the broader economy.

SADSTIA acknowledges the retirement of Deputy Director-General, Sue Middleton, in 2025. Under

Ms Middleton's leadership, a strong and constructive relationship was established between government and industry, and the Association expresses its sincere appreciation for her substantial contribution to the effective management of the deep-sea trawl fishery for hake.

As SADSTIA moves into the second quarter of 2026, the focus remains on building the momentum of the past year and ensuring that a culture of accountability and collaboration remains central to the way the industry operates.

SADSTIA actively encourages investment in fleet modernisation because it enables right holders to operate more safely and efficiently, while strengthening the fishery's ability to meet its sustainability commitments and remain globally competitive.



THE YEAR IN REVIEW



Much of SADSTIA's work in 2025 focused on ensuring the success of the final surveillance audit of the MSC certification for the 2021 to 2026 period, while also taking the first steps towards the re-certification of the hake trawl fishery.

SADSTIA announced its intention to re-apply for certification in March, marking the fifth time the Association has embarked on this demanding process. South Africa's hake trawl fishery was the first in the world to achieve MSC certification and it has maintained it through four consecutive five-year cycles since 2004. The current certification period ends in 2026, with re-certification targeted for May.

In preparation for the surveillance audit and in anticipation of tightening MSC requirements, fleet operators attended a workshop in Cape Town in February to establish a self-reporting system to enhance catch monitoring and improve recording of interactions with endangered, threatened and protected (ETP) species and seabed habitats. The workshop was well attended, with 58 skippers, fleet managers, vessel operators and company representatives participating in discussions led by SADSTIA and its scientific collaborators.

Improved self-reporting

The self-reporting scheme places significant responsibility on skippers and crew, requiring accurate reporting of interactions with ETP species, including seabirds, seals, turtles and sharks. Crews are also required to record the fishery's impact on seabed habitats by reporting catches of invertebrates such as sponges and hard corals, which may indicate interactions with vulnerable marine ecosystems (VMEs). The workshop emphasised the importance of accurate reporting, data submission formats, and how information is analysed and used.

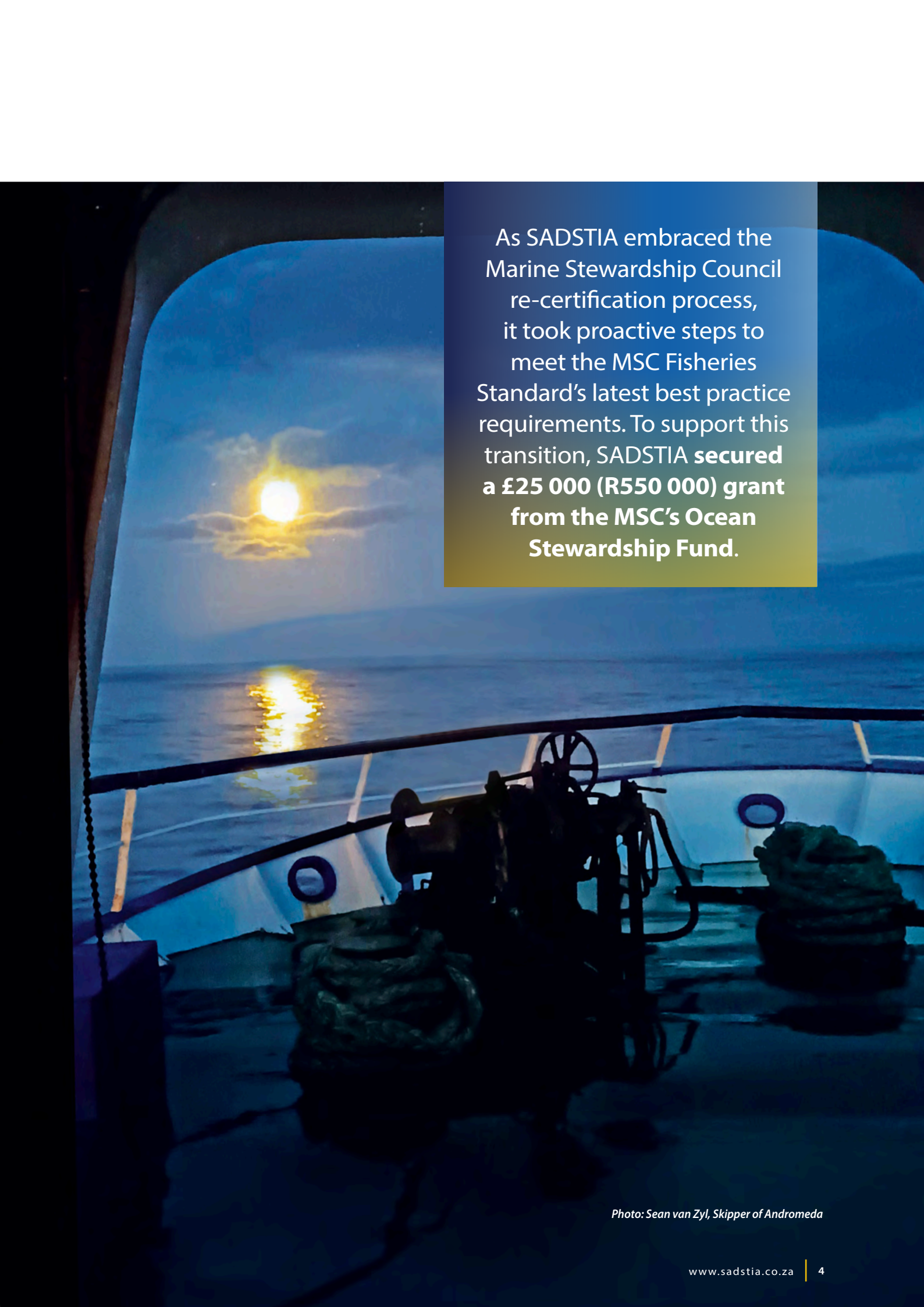
In May, SADSTIA and the South East Coast Inshore Fishing Association (SECIFA) appointed an

Environmental Liaison Officer (ELO) to maintain regular contact with vessels and support high-quality data collection.

By year-end, the ELO had visited vessels in Cape Town, Saldanha, Mossel Bay and Gqeberha, covering both offshore and inshore operations. Standardised reporting templates improved the completeness, accuracy and timeliness of incident reporting, particularly for ETP interactions.

Securing a successful surveillance audit and initiating the re-assessment process required extensive collaboration between SADSTIA's Scientific Committee, data specialists OLSPS, observer agency CapMarine and the DFFE. During a site visit in October, the Scientific Committee presented substantial evidence of vessel-based monitoring of VME interactions, records of large bycatch, and quantitative modelling studies on the impacts of trawling on seabirds, turtles, seals and sixgill sawsharks. Also presented to the Conformity Assessment Body (CAB) was a joint paper on the development of seabed management areas (SMAs), compiled with the South African National Biodiversity Institute (SANBI), the South African Environmental Observation Network (SAEON) and CapMarine.

Despite strong progress in 2025 and the finalisation of 12 of 14 certification conditions, a new condition was imposed in early 2026. This relates to compliance with prohibitions on fishing in marine protected areas (MPAs) and requires that DFFE's monitoring, control and surveillance systems are able to enforce these restrictions effectively. The condition is closely linked to Conditions 12 and 13, which require sufficient information to mitigate trawl impacts on VMEs.



As SADSTIA embraced the Marine Stewardship Council re-certification process, it took proactive steps to meet the MSC Fisheries Standard's latest best practice requirements. To support this transition, SADSTIA **secured a £25 000 (R550 000) grant from the MSC's Ocean Stewardship Fund.**

Photo: Sean van Zyl, Skipper of Andromeda

THE YEAR IN REVIEW

SADSTIA's engagement with the MSC extended beyond certification in 2025. Sea Harvest's Madoda Khumalo served on the MSC Stakeholder Council, while SADSTIA Executive Secretary Johann Augustyn was appointed to the MSC Technical Advisory Board which shapes the standards and methodologies underpinning the MSC programme. SADSTIA also continued supporting the development of the Certified Seafood International Standard, proposed as a simpler, lower-cost sustainability certification alternative to the MSC.

Also in 2025, SADSTIA secured a £25 000 (about R550 000) grant from the MSC's Ocean Stewardship Fund (OSF) to implement three forward-looking projects aimed at strengthening monitoring systems and regulatory compliance in the hake trawl fishery.

SADSTIA continued monitoring developments in the oil and gas and marine mining sectors. While many projects remain under litigation or in limbo, particular attention is focused on offshore exploration and mining activities with potential fisheries impacts.

Together with the Small Pelagic Fishing Industry Association, the Midwater Trawling Association (SAMTA) and SECIFA, SADSTIA maintained constructive engagement, with the Offshore Petroleum Association of South Africa and the upstream sector providing a forum to raise industry concerns. The northern West Coast near the Namibian border remains the primary focus of oil and gas activity.

In 2025, SADSTIA marked 20 years of support for the Offshore Observer Programme, which provides continuous scientific monitoring of the hake trawl fishery and supports MSC certification. SADSTIA funding has sustained the Programme which was originally funded by Government, building a long-term observer dataset that underpins stock assessments and management decisions.

Observer coverage reached 9 percent in the deep-sea fishery and 7 percent in the inshore sector in 2025. This is consistent with international standards for fisheries of the type and scale of the South African trawl fishery for hake.

*Photo: Reggie Carelse,
Skipper of Harvest Camissa*

Engagement with DFFE remained constructive despite leadership changes. Two DFFE–SADSTIA Liaison Committee meetings addressed key issues including monk and kingklip management, progress on the Marine Living Resources Act review, MPA development and research vessel funding. The postponement of the summer demersal survey due to vessel breakdowns and funding constraints raised concerns about potential impacts on the 2026 hake total allowable catch (TAC).

Through FishSA, the industry maintained dialogue with multiple government departments. Following ministerial changes in November, communication was established with the new Minister of Forestry, Fisheries and the Environment, Willie Aucamp, with substantive engagement planned for early 2026. Efforts to secure research and survey funding continued, with some success achieved through high-level support from the Director-General's office.

The trade environment became increasingly complex in 2025. The World Trade Organization (WTO) Agreement on Fisheries Subsidies entered into force in September, introducing new disciplines on harmful subsidies while protecting legitimate support for sustainable fisheries. SADSTIA maintained close engagement with government negotiators ahead of the 14th WTO Ministerial Conference scheduled for March 2026.

While 2025 brought significant achievements, challenges remain. Potential restructuring of SADSTIA to include SECIFA and SAMTA requires further consideration, compliance with MPAs must be strengthened to avoid future MSC conditions, and securing sustainable funding for research surveys remains a critical concern with direct implications for stock assessments and management. Nevertheless, SADSTIA enters 2026 from a position of strength, with the industry tightly regulated, markets robust and catch rates recovering strongly.



THE STATUS OF THE STOCKS

The TAC for hake is calculated using an operational management procedure (OMP).

This formula draws on two types of information: catch rate data and survey data collected at sea.

The challenge lies in timing. When authorities set catch limits in October for the following year, they work with incomplete information. Catch rate data is only available up to the end of the previous year, creating a delay of nearly two years between conditions experienced at sea and their reflection in management decisions. Survey data is more current – provided the research vessel completes its surveys on schedule.

In 2024, this time lag became a serious concern. Catch rates were poor in 2023 and remained low throughout 2024, yet the industry worried that the 2025 catch limit would be based on outdated data and set too high. An unrealistic catch limit creates operational challenges, as vessels and crews struggle to catch their allocation, disrupting planning and efficiency.

To address this, the industry began pooling catch information throughout 2024 to monitor trends as they occurred. The data confirmed what fishers were experiencing: catch rates had dropped sharply in 2023 and continued declining through 2024. Despite this, the 2025 catch limit was set at 151 739 tons – 4.1 percent higher than the previous year.

The industry repeated its monitoring exercise in 2025, and this time the outlook improved. Catch rates increased in the first half of the year and remained stronger throughout 2025. Based on the official formula, the 2026 catch limit was reduced by 5 percent to 144 152 tons. However, because the formula relies on data from 2024, it cannot yet reflect the improved conditions experienced in 2025.

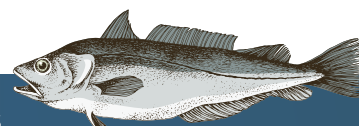
Some fishing operators are developing electronic systems to capture data more quickly, which may help reduce these delays in future.

Survey challenges

A persistent problem has been that the research vessel *Africana*, which is owned and operated by DFFE, has suffered technical problems that prevented completion of the 2025 summer and autumn surveys.

The OMP can accommodate occasional missed surveys, but long-term gaps will eventually reduce catch limits. The industry has raised these concerns repeatedly. The problem affects the small pelagic fishery particularly severely because it depends directly on survey results. A small pelagic survey scheduled for November 2025 was given priority over the usual summer survey for hake, causing further delays. These survey failures are undermining the fishing industry, putting substantial export earnings and jobs at risk. SADSTIA is concerned that a lack of surveys over an extended period might also impact the MSC certification. The Association and its members hope the authorities can resolve this situation.

The hake OMP is due for revision in 2026 and the 2027 catch limit will be set using the updated approach. This process involves reviewing all the data, how it is summarised, how fish stocks are assessed and how catch limits are calculated. The DFFE and its consultants will work closely with stakeholders throughout the revision.



CURRENT STOCK STATUS: Each year, DFFE and its consultants update their assessment of hake stocks. The October 2025 assessment showed little change from 2024. The results confirm that the hake resource remains above the level that produces maximum sustainable productivity and catches remain well below what the stock can support. **This places the fishery in the OPTIMAL CATEGORY FOR SUSTAINABILITY.**

HAKE TAC 4 YRS

138 760 TONS 2023

145 698 TONS 2024

151 739 TONS 2025

144 152 TONS 2026

The global total allowable catch for hake in 2026

The global hake TAC is set at 144 152 tons for the 2026 fishing season. This is a 5 percent reduction from the 2025 TAC. It includes a 553.4-ton bycatch reserve for the midwater trawl fishery that targets horse mackerel (covering incidental hake caught during these operations). This reserve is subtracted from the total hake TAC before dividing the remainder among hake-focused fishing sub-sectors.

Total directed hake catches for 2026 are therefore set at 143 598.60 tons, divided by sector:

SECTOR	PERCENTAGE	TONS
Handline	1.8433	2 646.952
Longline	6.5510	9 407.144
Inshore trawl	6.1790	8 872.957
Offshore trawl	83.9268	120 517.709
Small-scale fishing	1.5000	2 153.979
Foreign fishing	Nil allocation	
Recreational fishing	Daily bag limit as per approved regulation	

PROGRESS WITH THE MARINE STEWARDSHIP COUNCIL CERTIFICATION



The year's activities were focused on the fourth annual surveillance audit under the current (fourth) period of MSC certification and gearing up for the re-assessment of the trawl fishery ahead of an anticipated fifth period of certification.

It was a complex undertaking that required strong collaboration and cooperation between SADSTIA's Scientific Committee, data specialists OLSPS, the fisheries observer agency CapMarine and the DFFE. Also involved were SANBI, SAEON and BirdLife South Africa.

Preparations peaked around a site visit by the CAB to Cape Town in October 2025. The CAB is led by senior technical expert, Jim Andrews and includes technical experts Johanna Pierre and Guiseppe Scarcella.

The audit outcomes showed that the South African trawl fishery for hake continues to make strong progress in meeting the conditions attached to certification. These conditions are designed to ensure continuous improvement in areas such as stock assessment, protection of sensitive species, habitat management and governance.

The specific findings of the fourth surveillance audit are detailed here.

Stock assessment

Progress has been achieved in strengthening the scientific assessment of the deep-water hake stock (*Merluccius paradoxus*), which is shared between South Africa and Namibia. Both countries are now using assessment frameworks that are appropriate for the stock and explicitly linked to their respective harvest control rules. The stock is assessed against biological reference points, allowing managers to track its status relative to sustainable levels.

SADSTIA Chairman, Innocent Dwayi, pictured with Hannah Cockerton, MSC Fisheries Standard Manager; Jim Andrews, senior technical expert and head of the CAB; technical experts, Guiseppe Scarcella and Johanna Pierre; and Johann Augustyn, SADSTIA Executive Secretary



Protection of ETP species

The audit confirmed that the fishery continues to demonstrate a strong understanding of its impacts on ETP species and has effective measures in place to manage these impacts.

Strengthening ETP management and information

Good progress has been made in implementing management strategies for ETP species. Information collection continues through the Offshore Observer Programme and the industry's self-reporting system, with data gathered on catches, discards, large bycatch and seabird interactions. The ELO plays an important role in supporting reporting and follow-up.

Habitat management

The audit noted good progress in understanding and managing the fishery's impacts on seabed habitats. Observer data on interactions with seabed organisms is being used to refine move-on rules, while updates to the habitat management strategy are supported through a memorandum of understanding between industry operators. Information continues to be collected on interactions with VME indicator species, supporting improved scientific understanding and the development of precautionary trigger levels.

Management and governance

Cooperation between the South African and Namibian MSC-certified fisheries continues through regular engagement under a memorandum of understanding signed in 2022.

Monitoring, control and surveillance

A new condition was introduced at this audit in response to concerns about compliance with restrictions on fishing in MPAs. The condition requires that monitoring and enforcement systems demonstrate the ability to ensure compliance and provide effective deterrence.

The audit found that no changes in management have taken place that would negatively affect the fishery's performance against the MSC Fisheries Standard. The fishery continues to meet the requirements of the Standard, with no destructive fishing practices introduced and full compliance with MSC requirements relating to forced and child labour.

On the basis of the surveillance audit, the re-certification of the South African trawl fishery for hake is likely to continue, with future audits proceeding according to the established surveillance schedule.



PIONEERING

INNOVATION & PARTNERSHIP

A £25 000 (R550 000) grant from the MSC's OSF enabled SADSTIA to advance three pilot initiatives in 2025, each designed to strengthen monitoring, improve environmental performance and explore new approaches to responsible fishing. Together, these projects reflect SADSTIA's commitment to apply innovation, technology and practical ingenuity to continuously improve the South African trawl fishery for hake.

South Africa's first harbour-based net recycling facility

A landmark circular economy initiative was launched at Cape Town's V&A Waterfront in October 2025, bringing together the environmental commitment of the fishing industry, the engineering expertise of Ocean Plastics Technologies and the extensive experience of OCEAN Action Network. The project demonstrates how collaboration and creative problem-solving can turn waste into a resource.

Two converted shipping containers were installed at Collier Jetty in July 2025 – one housing a micro-recycling plant and the other providing net storage. The facility shreds, washes, dries and densifies used nets into reusable plastic flakes, with a processing capacity

of up to 100 kg per hour. The facility is operational, with ongoing work to improve productivity, particularly in the cutting process and flake drying system.

From a sustainability perspective, the benefits are twofold: fishing companies save money by avoiding landfill fees for used nets, while local communities gain employment and a sense of ownership as operators of the recycling facility. Another important benefit is the retrieval and recycling of ghost nets (abandoned, lost or otherwise discarded fishing gear) that damage marine ecosystems. With a proper recycling system in place, trawler owners are incentivised to retrieve lost nets rather than abandon them at sea.



Independent verification of seabird protection

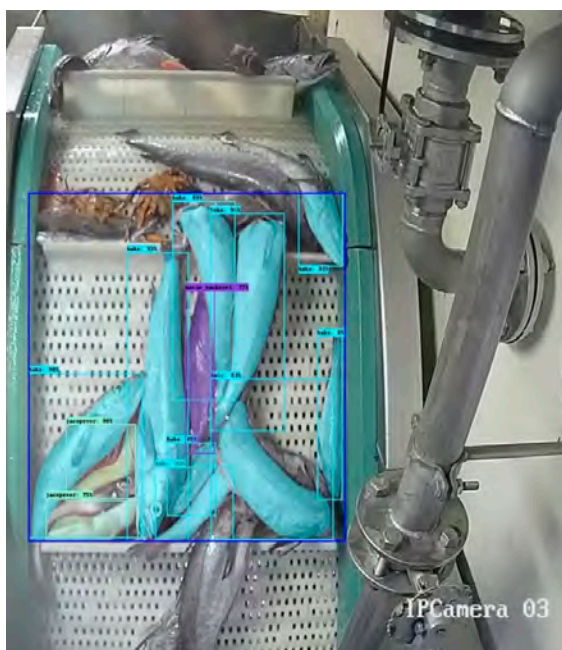
In partnership with Imvelo Blue Environment Consultancy, SADSTIA is piloting electronic tension sensors that attach to bird scaring lines (BSLs). The sensors provide independent confirmation that BSLs are deployed during trawling, allowing shore-based observers to verify their use in real-time, strengthening confidence in seabird mitigation measures.

By July 2025, 10 hake trawlers had been fitted with the sensors. An online dashboard displays compliance through a colour-coded system, providing immediate feedback to operators and managers. Overall compliance was high, although the data highlighted challenges around BSL deployment during night-time fishing when low visibility at the stern poses safety risks. A new dashboard feature now separates day and night operations to improve tracking. The findings of this pilot will inform both operational safety improvements and the increasingly rigorous evidence requirements of the MSC certification process.



The electronic tension sensor that attaches directly to the BSLs deployed by trawlers in the hake trawl fishery

Artificial intelligence for bycatch monitoring



Artificial intelligence tools are being refined to accurately identify fish species caught by trawlers in South Africa

Building on research led by Professor Colin Attwood at the University of Cape Town, SADSTIA continued installing advanced camera systems on its member's vessels and refining artificial intelligence tools to routinely analyse the composition of the bycatch component of the trawl fishery. The pilot project aims to demonstrate the use of this technology, thus encouraging its future use in the fishery.

In parallel, SADSTIA's Fisheries Improvement Project – launched in late 2024 with WWF and the South African Sustainable Seafood Initiative (SASSI) – continued work on stock assessments for seven key bycatch species: angelfish, jacobever, panga, Cape gurnard, Cape dory, ribbonfish and biscuit skate. All assessments were completed by year-end. This work aims to improve SASSI ratings for these species while strengthening the scientific evidence base for MSC certification, supporting both conservation objectives and the long-term resilience of the trawl fishery.

IMPROVEMENTS IN FISHERIES COMPLIANCE

In 2025, the MSC identified a critical data gap concerning interactions with ETP species. As a result, SADSTIA instituted a self-reporting programme to close data gaps on ETP species interactions, strengthen transparency, validate observer data and support the integrity of MSC certification.

In May, SADSTIA appointed Alistair Burls as ELO to oversee the self-reporting programme. The position is a first for SADSTIA and SECIFA and potentially for African fisheries.



Alistair Burls, Environmental Liaison Officer for SADSTIA and SECIFA

Burls holds a National Diploma in Oceanography from Cape Peninsula University of Technology and has extensive experience as a scientific fisheries observer, marine mammal observer and programme coordinator at CapMarine. As ELO, he serves as the primary liaison between fishing vessels and industry management. Core functions include training senior crew on environmental mitigation measures and reporting requirements, responding to “trigger events” when vessels interact with ETP species, and developing vessel-specific risk management plans. Additional responsibilities are fleet engagement and compliance monitoring, programme validation through fishery observer feedback and coordination with CapMarine and industry stakeholders.

Standardised reporting templates have been implemented, ensuring fishing crews now understand the documentation requirements for trigger events. This has resulted in more complete and timely incident reporting, with significant improvements in the accuracy and timeliness of ETP interaction data.

A notable cultural shift has emerged, with strong crew engagement across the fleet. The programme has been accepted as a practical operational requirement rather than an administrative burden, with crews demonstrating genuine interest in understanding and meeting reporting standards.

The programme will transition towards near real-time reporting with photographic evidence and trip-based submissions. Evaluation of onboard camera systems and artificial intelligence-supported monitoring is under consideration to further support handling and release protocols, particularly for larger bycatch species.

TWO DECADES OF OBSERVER DATA

Now in its twentieth year, the SADSTIA-funded observer programme continues to generate the long-term data that underpins science-based fisheries management. Its scope and scale have grown steadily and it remains central to ensuring the fishery meets the rigorous standards of the MSC.

Observer coverage in 2025 reached 9 percent in the deep-sea trawl fishery and 7 percent in the inshore trawl fishery (see table). Between 1 January and 31 December 2025, approximately 209 tons of catch from the deep-sea fishery and 24 tons from the inshore fishery were sampled for composition, including species identification, length measurements and weights.

Observers also monitor large bycatch, with a particular focus on ETP species, including large sharks, skates and rays. These species, once overlooked, are now routinely recorded and where possible, released alive.

On-deck observations include counts of seals within a 50 m radius of the vessel, as well as recording all large animals caught in the net before discharge. Where animals are dead, observers collect biological data such as sex, length and weight; where animals are alive, the method of release is recorded.

Dedicated observations of seabird interactions with trawl warps are conducted in both the deep-sea and inshore fisheries. Observers record interactions during setting and trawling, as well as the number of birds by species around the vessel.



Fisheries observer Sipho Nkohl

Number of observed trips, seadays and trawls conducted from 1 January to 31 December 2025 in the South African trawl fishery for hake

SECTOR	TRIPS	% COVERAGE	TRAWLS	% COVERAGE	DAYS	% COVERAGE
Inshore	28 (36)	5 (7)	401 (547)	6 (8)	172 (246)	7 (10)
Offshore	75 (94)	6 (8)	2 600 (3 212)	9 (11)	1 065 (1 294)	9 (11)

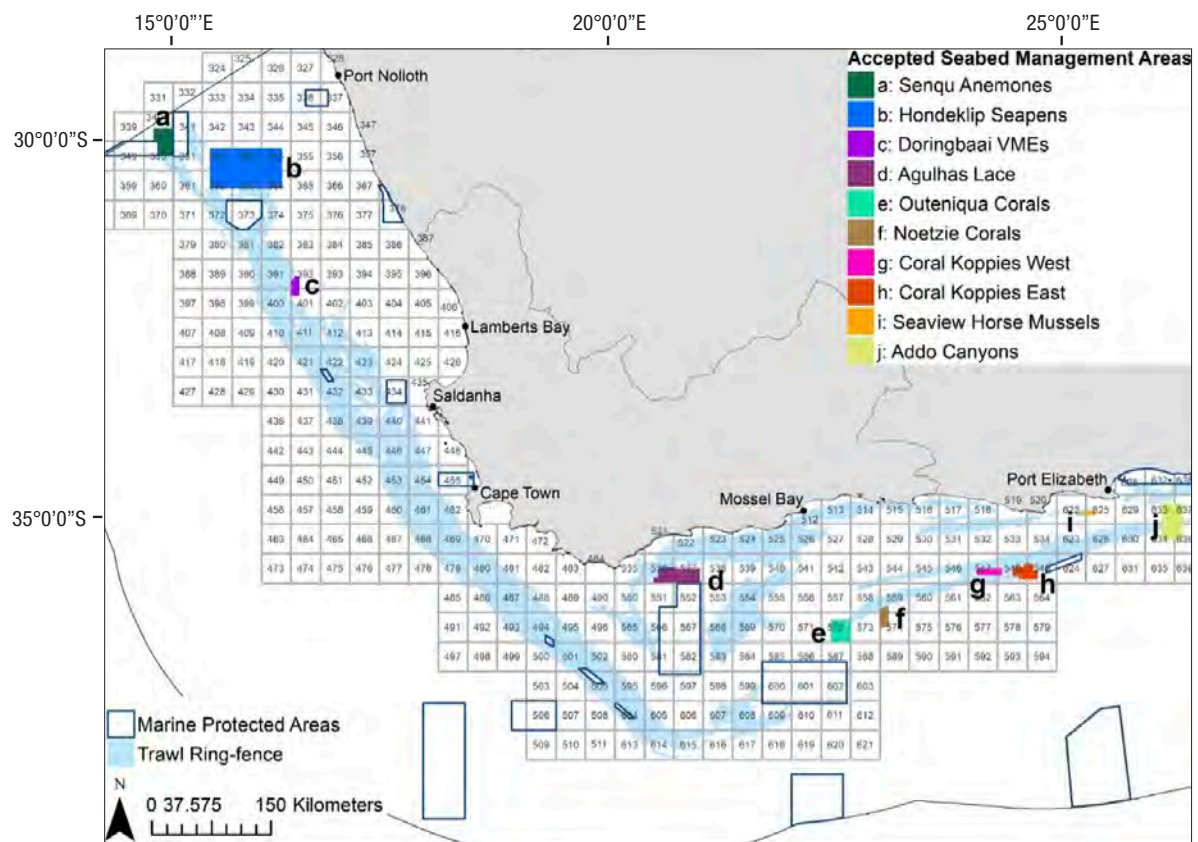
Notes: The numbers in brackets indicate the coverage achieved in 2024.

PROGRESS WITH SEABED MANAGEMENT AREAS

In 2025, after more than two years of engagement with a team of seabed habitat experts, SADSTIA members agreed to avoid fishing in 10 SMAs.

The agreement followed an extensive collaborative process involving marine scientists and fisheries managers from SADSTIA, SECIFA, CapMarine, SANBI, SAEON and DFFE. Technical work was partially supported by the Mission Atlantic Project and a doctoral degree was produced that advanced the identification, mapping and management of VMEs. Efforts were focused on protecting VMEs within parts of historically trawled areas.

The 10 SMAs are detailed in the map. They were identified through habitat mapping, scientific analysis and expert review. Portions of most SMAs are located within the trawl ring fence, but SADSTIA and SECIFA members have voluntarily committed not to fish in these areas. Together with MPAs, the SMAs constitute a network of protected seabed areas that balance environmental protection with the continued operation of a well-managed and regulated fishery.



The map shows the 10 SMAs that are being avoided by SADSTIA and SECIFA vessels. Commercial trawl grid numbers are provided for orientation and the trawl footprint is indicated in blue

THE 10 SMAs:

Senqu anemones – protects areas with high densities of sea anemones and links existing MPAs

Hondeklip sea pens – protects known sea pen aggregations in areas with low trawl effort

Doringbaai VMEs – covers areas with multiple VME species

Agulhas Lace – links and extends two existing MPAs, forming a larger protection corridor

Noetzie corals – protects a verified cold-water coral reef

Coral koppies (x2) – provides first-time protection for the Kingklip koppies ecosystem

Seaview horse mussels – safeguards areas with highest densities of horse mussels and sea urchins

Addo canyons – protects submarine canyons with confirmed coral reefs

Brulpadda corals – protects confirmed cold-water coral mounds



VMEs ARE FRAGILE, SLOW-GROWING COMMUNITIES OF MARINE LIFE SUCH AS COLD-WATER CORALS, SPONGES AND SEA PENS THAT PROVIDE HABITAT FOR OTHER MARINE LIFE AND CAN TAKE DECADES OR CENTURIES TO RECOVER IF DAMAGED.

COMMUNITY DEVELOPMENT

PRACTICAL KNOWLEDGE FOR SMALL-SCALE FISHERS

To date, 981 fishers from 142 cooperatives across South Africa's coastal provinces have completed Oceana's "Cooperative Sense" training programme, this includes 100 individuals who attended the Food and Beverages Sector Education and Training Authority (FoodBev SETA) training programme in 2025. Oceana also trained a total of 150 people in South African Qualifications Authority-certified NQF level 1 and 2 courses.

Cooperative Sense training is helping South Africa's small-scale fishers build the skills they need to play a meaningful role in the ocean economy. It gives small-scale fishers hands-on knowledge of running a cooperative, managing a business, staying safe at sea, handling food safely and fishing sustainably.

An independent impact assessment in 2024 showed the programme is making a real difference – participants reported better cooperative management skills, stronger financial performance and a clearer understanding of market opportunities. Building on this, Oceana and the DFFE have launched a national mentorship programme, funded by a R4.4 million FoodBev SETA grant, to provide ongoing coaching and support to 250 cooperatives.

Class is in session: training at the Oceana Maritime Academy



El-Jay with his mom and sister Inke at the Wildeklaar Tournament in Kimberly



INVESTING IN COMMUNITIES: THE SEA HARVEST FOUNDATION

Behind every thriving fishing company is a community that makes it possible. The Sea Harvest Foundation exists to give back to those communities and in 2025 the Foundation continued to make a tangible difference in people's lives.

Established as a registered non-profit company, the Foundation channels support to three areas where it can have the greatest long-term impact: education and youth development, health and wellness, and community and small business development. Every application is reviewed quarterly by the Foundation Board, ensuring donations are directed where they are needed most and where they will last.

For Elodia Alexander, a Sea Harvest employee and single mother, the Foundation's support meant her son El-Jay could take part in the Wildeklaar Tournament in Kimberley – an opportunity that might otherwise have been out of reach. The Wildeklaar Tournament is one of the most prestigious rugby festivals in South Africa.

It is precisely these moments – a young person given the chance to compete and a family spared a difficult choice – that reflect what the Foundation is for.

Other recent beneficiaries of the Sea Harvest Foundation are learner, Tswakay Boysie who was able to participate in the Riebeeck Valley Rugby Tournament and the Diazville High School golf team which was able to compete in the local schools' golf league in 2025.

NSRI BENEFITS FROM FISHING INDUSTRY SUPPORT



Above: Brett Ayres, NSRI Chief Operations Officer, congratulates Roger Coppin, Managing Director of I&J on the company's platinum sponsorship

Right: Renewing a platinum partnership – Oceana CEO Neville Brink with Mike Vonk, CEO of the NSRI.

South Africa's fishing industry operates in a challenging environment where safety at sea is paramount. For companies with large numbers of employees working offshore, the volunteer-run National Sea Rescue Institute (NSRI) provides an essential safety backbone, responding to emergencies along the coastline and standing ready to assist seafarers in distress.

Recognising the vital role the NSRI plays in maritime safety, fishing companies continue to support the organisation through regular donations. In 2025, both the Oceana Group and I&J renewed their platinum memberships of the NSRI and made substantial donations to the organisation. SADSTIA donated R10 000 separately.

Beyond responding to emergencies at sea, the NSRI also works to prevent drownings through its nationwide



water-safety programme, which teaches swimming and survival skills to thousands of schoolchildren each year. By supporting the NSRI, fishing companies are helping to sustain a service that protects both those who work at sea and communities across South Africa.

FEEDING THE FUTURE



St Helena Bay Primary School in the Western Cape is the latest recipient of a fully equipped kitchen and dining facility proudly donated by the Oceana Group in October 2025.

The kitchen was officially opened by Oceana Group CEO, Neville Brink and the Principal of St Helena Bay Primary School, Jimmy Williams. West Coast Education District Director, Anlerie Truter, delivered an inspirational keynote address on the day, recognising the true value that

The happy faces say it all! A fully equipped kitchen was recently donated by the Oceana Group to St Helena Bay Primary School

government and corporate partnerships can unlock for education in South Africa.

Since 2022, Oceana has installed five modern school kitchens and dining areas, providing healthy meals twice daily to over 750 learners across four west coast schools.

SERVING UP HOPE FOR 90 YEARS



Marlon September (I&J), Janey Ball (Service Dining Rooms), Cape Town Mayor Geordin Hill-Lewis and Celeste Erwee (I&J)

Established in 1935, the Service Dining Rooms on Canterbury Street has served nearly 6 million meals, remaining a beacon of hope in Cape Town's city centre. In October 2025, the organisation celebrated its 90th anniversary with a lunch honouring nearly a century of service. Food partners such as I&J and SA Harvest regularly provide much-needed protein, helping ensure nutritious meals reach those in need. In recognition of its unwavering service and impact, the Service Dining Rooms were awarded the Mayor's Medal, one of the City of Cape Town's highest civic accolades.

CFE SUPPORTS MASICORP FOR MORE THAN 10 YEARS

*Kholosa Bangani,
education administrator
for Masicorp, teacher
Fortunate Mashoko and
Masicorp fundraising
manager, Megan Pringle
with some beneficiaries
of Masicorp's work
in early childhood
development*



For more than a decade, Combined Fishing Enterprise (CFE) has been one of the steadiest supporters of the Masiphumelele Corporation (known as Masicorp). What began in 2014 as funding for student bursaries has grown into a flexible, long-term partnership, helping the organisation respond to everything from shack fires to the COVID-19 pandemic.

CFE co-owner Don Lucas first approached Masicorp after researching organisations making a real difference locally. He visited, toured the programmes and agreed to fund the bursary scheme, which at its peak supported around 50 tertiary education students with study materials, transport costs and mentorship.

When Masicorp wound down the bursary programme in 2018, CFE did not step back. Support shifted to wherever it was most needed – the preschool feeding scheme, the women's sewing programme, school uniforms and emergency funds during the pandemic. CFE now makes unrestricted annual donations that Masicorp can direct as it sees fit.

Don Lucas also refers Masicorp to other companies in his network. During the pandemic, it was through him that Fish SA donated a pallet of frozen fish and non-perishables at a time when feeding programmes were under real pressure.

ABOUT MASICORP

Masicorp was founded in 1999 in Masiphumelele, a township of roughly 40 000 people covering just two square kilometres on the Cape Peninsula. It began as a volunteer-run organisation building homes, crèches and community facilities. Eighty-five per cent of Masicorp's staff live in the community, giving the organisation a grounded understanding of local needs. Today it employs around 65 staff and 40 volunteers, and is registered as a non-profit in South Africa, the UK, the US and the Netherlands.

Its work spans early childhood development, primary school learning support and adult skills programmes. Three early childhood centres provide around 400 children with meals daily. At the local primary school, Masicorp has funded maths, science and English learning laboratories for over 12 years. Its women's sewing programme supports around 48 participants a year, blending practical skills with computer literacy and basic English.

With 98 per cent of its income from donations and trusts and almost no government support, relationships like the one with CFE remain essential.

FROM CADETS TO CERTIFIED MARINE ENGINEERS



In November 2022, three ambitious young I&J engineering cadets – Phiwe Jakuja, Siphelo Zwelibanzi and Xola Ndzima – began a rigorous journey of academic training and sea-time experience that tested their resilience, technical competence and personal

discipline. Having passed their final South African Maritime Safety Authority examinations, all three now stand proudly as qualified marine engineering officers – a milestone for them, I&J and the broader maritime industry.

I&J LIFESAVING CAPE TOWN: HEROES AWARDS CEREMONY

On 21 June 2025 at the Two Oceans Aquarium, I&J proudly supported the Lifesaving Cape Town Heroes Awards ceremony, where 14 lifeguards were honoured for their bravery during the 2024–2025 summer season, each receiving a trophy and certificate. Through its sponsorship, I&J celebrates the courage and heroism of lifeguards who risk their lives to save others.



I&J CELEBRATES 30 YEARS OF PARTNERSHIP WITH TWO OCEANS AQUARIUM



As a founding member since 1995, I&J celebrated the Two Oceans Aquarium's 30th anniversary, reaffirming a long-standing commitment to marine conservation and environmental stewardship. Since the aquarium's opening, I&J has delivered monthly fresh fish supplies to feed over 6 000 marine animals. I&J also supports the Two Oceans Aquarium Education Foundation, funding critical research and marine science education for future generations.

TRASH 2 TREASURE

Young learners proudly holding
their gift from Sea Harvest



In July 2025, Sea Harvest launched the second round of its Trash 2 Treasure recycling education programme, partnering with Weskus School of Skills, Steenberg's Cove Primary School and St Helena Bay Primary School. Through interactive workshops, grade 1 to 8 learners explored the real-world impact of simple habits – sorting waste, reusing materials and reducing litter.

In three years, the Trash 2 Treasure programme has been rolled out to 10 schools. Its impact has been significant: an estimated 9 300 learners and 340 educators have been positively influenced and 15 tons of recyclables have been diverted from landfill.

LITTER TRAP **STOPS** LITTER FROM **REACHING** THE SEA

From left to right: Philani Makhabela
(Mechanical Engineering graduate) who
designed the litter trap, Michaela Laubscher
(Sea Harvest Foundation graduate) and Keanan
Van Wyk (Environmental & Safety Officer)



Funded by the Sea Harvest Foundation, a third litter trap has been installed at the stormwater drain outlet at Hoedjies Bay in Saldanha, preventing pollutants from reaching the ocean. The installation was one of several environmental projects supported by the Sea Harvest Foundation in 2025.

COMMUNICATIONS

VIDEO SEPARATES TRAWLING ❌ MYTHS FROM ✅ FACTS



In 2025, in partnership with the MSC's office for Africa and the Middle East, SADSTIA produced an animated film that dispels some common myths about trawling.

Using the South African trawl fishery for hake as an example of a sustainable and well-managed fishery, the film challenges three myths that continue to shape public perceptions of the fishing industry:

❌ **MYTH: Bottom trawl fisheries can never be sustainable.**

✅ **Fact:** The South African hake fishery has been trawling the same grounds for 125 years and meets rigorous MSC standards for healthy fish stocks and proper fishery management.

❌ **MYTH: Trawling turns the seabed into a lifeless desert.**

✅ **Fact:** Trawling is restricted to a small area (4.8 percent of South Africa's ocean) via a trawl ring fence which prevents the expansion of the trawl footprint. Twelve MPAs offer further protection.

❌ **MYTH: Trawling results in massive waste.**

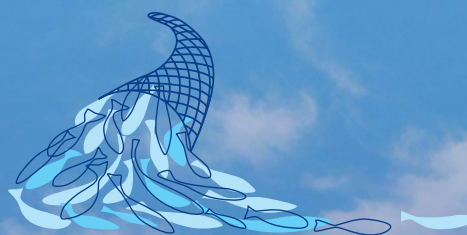
✅ **Fact:** Targeting highly valued MSC-certified hake incentivises companies to fish efficiently, minimise unwanted bycatch and strictly control catches of protected species.

The film delivers the message that bottom trawling, with strong oversight, can be sustainable, produce high-quality food and contribute to economic prosperity.

SADSTIA supplements the film about trawling myths and facts with a **Q&A** that answers some of the questions the general public may have about trawling and its effects on the environment.



Scan QR code
for the Q&A



SADSTIA
South African Deep-Sea Trawling Industry Association

MSC RE-CERTIFICATION
TARGETED FOR MAY 2026



**20 YEARS OF SUPPORT FOR
THE OFFSHORE OBSERVER
PROGRAMME IN 2025**



OBSERVER COVERAGE IN 2025

**9% DEEP-SEA
TRAWL FISHERY**
209 TONS SAMPLED

**7% INSHORE
FISHERY**
24 TONS SAMPLED

CATCH LIMIT



144 152 TONS
2026 -5%



**SELF-REPORTING SYSTEM
ESTABLISHED FOR CATCH
MONITORING & RECORDING
INTERACTIONS WITH ETP
& VME SPECIES**

**ENVIRONMENTAL
LIAISON OFFICER**

**JOINTLY APPOINTED BY
SADSTIA & SECIFA**

R550 000

**MSC GRANT SECURED
FOR 3 PILOT PROJECTS**



**SADSTIA MEMBERS AGREE
TO AVOID FISHING IN 10 SMAs**



SADSTIA MEMBERS

Amawandle Hake (Pty) Ltd.
Azanian Fishing Company (Pty) Ltd.
Balobi Fishing Enterprises (Pty) Ltd.
Bhana Coastal Fishing CC.
Biz Afrika (Pty) Ltd.
Blue Continent Products (Pty) Ltd.
BP Marine Products CC.
Combined Fishing Enterprises (Pty) Ltd.
Community Workers Fishing Enterprises (Pty) Ltd.
Dyer Eiland Visserye (Pty) Ltd.
EFH Walters Trawling (Pty) Ltd.
Eyethu Fishing (Pty) Ltd.
Impala Fishing (Pty) Ltd.
Irvin & Johnson (Pty) Ltd.
J&J Visserye CC.
J Engelbrecht Visserye CC.
Khanyisile Fishing (Pty) Ltd.
Khoi Qwa Fishing Development Company (Pty) Ltd.
Letap CC.
Mayibuye Fishing (Pty) Ltd.
Nalitha Fishing Group (Pty) Ltd.
Ntshonalanga Fishing (Pty) Ltd.
Ocean Ukhozi Fishing (Pty) Ltd.
Offshore Fishing Company (Pty) Ltd.
Pellsrus Historical Fishing Corporation CC.
Pioneer Fishing (Pty) Ltd.
Premier Fishing SA (Pty) Ltd.
Rainbow Nation Fishing CC.
Sea Harvest Corporation (Pty) Ltd.
SeaVuna Fishing Co. (Pty) Ltd.
South African Fishing Empowerment Corporation (Pty) Ltd.
Suidor Fishing (Pty) Ltd.
Tradeforth 13 (Pty) Ltd.
Ukuqala Trading CC.
Usuthu Fishing CC.
Ziyabuya Fishing Eastern Cape (Pty) Ltd.
ZWM Fishing (Pty) Ltd.

SADSTIA REPRESENTS

37 RIGHT-HOLDERS
active in the hake
deep-sea trawl fishery



SADSTIA MEMBERS
participate in a sustainable,
MSC-certified fishery

12 400 JOBS

R8.5 billion to the South African
ECONOMY every year

THE INDUSTRY IS **86%** BLACK-OWNED

in f www.sadstia.co.za



**LEARN THE FACTS
ABOUT TRAWLING
IN SOUTH AFRICA**

Cover photo: Sean van Zyl,
Skipper of Andromeda