



2009  
Celebrating 10 years  
of partnership and progress



## NET BENEFITS

The first ten years of MSC certified sustainable fisheries



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This year the MSC celebrates 10 years of partnership and progress. It is a decade since the first fisheries entered the MSC programme and to mark the occasion we have produced this publication to recognise and celebrate their success and to tell their stories in their own words.

Looking back, it has been an amazing journey. It began when WWF and Unilever came together in the wake of the collapse of the Grand Banks cod fishery to create a market based programme to promote and encourage sustainable fishing. Both organisations were deeply concerned about the future health and productivity of our oceans and the sustainability of seafood supplies into the future. MSC was created as a market-based certification and eco-labelling programme to recognise and reward environmentally responsible and sustainable fishing practices and importantly, to empower consumers through the use of the label to

make the ‘best environmental choice’. We became a fully independent, operational, international, not for profit organisation in 1999.

A decade on, as demonstrated in the stories of these pioneering fisheries, it is clear that greater demand for credible certified sustainable seafood is driving positive change in the way the oceans are fished. Today over 150 fisheries around the world are engaged at some stage of the independent assessment process. These fisheries land over 6 million tons of seafood – about 7% of the annual global wild harvest.

MSC owes a tremendous debt to the fisheries featured in this publication – the first 42 fisheries to achieve MSC certification. They had the courage, commitment and foresight to invest in the then young and evolving programme and have created the supply upon which a rapidly growing market for sustainable seafood is dependent. In turn we are also extremely grateful to the many seafood businesses and retailers around the world who have put seafood sustainability at their heart of their procurement strategies. Today the market for MSC certified sustainable seafood is estimated to be worth over \$1.5 billion. There are also over 2500 individual MSC labeled products available in 52 countries around the world.

I would like to thank all those individuals and organisations who have been central to the establishment of the MSC. I also want

to acknowledge the vital role of our funders whose collective and generous support has sustained the MSC over our first decade. Some of our major funders have supported us from the beginning. This funding has been crucial and has enabled us to develop the partnerships and working relationships that have been the foundation of the programme’s success and growing influence. We are also indebted to the marine conservation NGOs and the scientific community that have been central to establishing the credibility of the MSC standard for environmentally responsible and sustainable fishing.

Whilst the following pages demonstrate that we all have a great deal to celebrate it is clear that much more needs to be done and urgently if we are to ensure the future health and productivity of our oceans. We look forward to building on the achievements of this first decade by working together with all of our partners towards accomplishing our vision of the world’s oceans teeming with life, and seafood supplies safeguarded for this and future generations.



Rupert Howes  
Chief Executive, September 2009

Cover photo: South-west handline mackerel fishery, UK © John Spaul; South Africa hake fishery, South Africa © John White / MSC; American Albacore Fishing Association Pacific albacore tuna, US © Fishes Holding BV; US North Pacific sablefish, US © Peter Thompson; Domstein Longliner Partners North East Arctic cod and haddock, Norway © Alice Blålid; Alaska salmon, US © Chris Arend Photography; Mexico Baja California red rock lobster, Mexico.

# Sea change: 10 years of the Marine Stewardship Council

by Andrew Purvis



EVER SINCE 1999, when the first fisheries joined its embryonic programme, the Marine Stewardship Council (MSC) has helped bring to our attention an astonishing and sustainable resource. On the eve of the organisation's 10th anniversary year, there were over 2,000 products and close to 2.5 million tonnes of sustainable seafood carrying the MSC ecolabel. But behind the blue ecolabel on the products are the men and women from MSC-certified fisheries worldwide who have made it possible by honing best practice on a daily basis. Together, they know just about everything there is to know about sustainable fisheries management.

In this 10th anniversary booklet, that is the resource that is being celebrated – and to find out how the MSC programme is helping fisheries a decade after setting out its stall, I asked fishers and client organisations to tell the MSC story in their own words. Has certification delivered what it promised? Have there been clear economic benefits? Has the familiar blue ecolabel resulted in a market premium, helped the fishers penetrate new markets or allowed them to retain old ones? I was also keen to find out whether there have been measurable environmental gains – such as stock recovery, new scientific research, reduced bycatch or increased observer coverage on vessels. And what about clear social benefits? Has the MSC programme helped protect jobs and communities, increased interest in fishing as a way of life or improved access to social regeneration programmes or government funds?

Across time zones, weather systems and language barriers, I spoke in turn to every one of the 42 fisheries certified by April 2009 and asked them these key questions. Every fishery has a fascinating story to tell – and among the answers was compelling evidence of the many ways in

which the MSC programme is contributing to improving the health of our oceans.



## Environmental benefits

Does certification make a fishery more sustainable, or does it simply reward best practice that exists already? Many fisheries have been fishing sustainably for longer than the MSC has been in existence but, as this booklet demonstrates, measurable improvements have occurred under MSC certification. One notable example is the **New Zealand hoki** fishery (page 14), where historically low stock levels have this year recovered due to a raft of management measures. These include a stock rebuilding plan proposed by certifiers as part of MSC certification.

In South Africa, too, the marine environment is healthier as a direct result of the MSC programme's involvement. The economically important **South Africa hake** trawl fishery (page 24) was required to investigate mortality rates among seabirds that were caught in trawl warps and, if studies proved it necessary, take steps to reduce them. As a result, bird kills have decreased dramatically from a previously unrecorded 18,000 to just 200 per year.

As a condition of its certification, the **Norway North Sea and north-east Arctic saithe** fishery (page 56) was required to record bycatch more systematically than under existing regulations. This, it believes,

may lead to changes in the way other fisheries are managed. It also co-operated with government scientists on mapping deep coral areas closed to trawlers, to see if they were damaged or depleted by static gear.

In another case, gains came as a direct result of "chain of custody" certification – through which all seafood carrying the MSC logo is traceable all the way back to the certified fishery. To qualify, the **South Georgia Patagonian toothfish** fishery in the South Atlantic (page 22) requires its entire catch to be weighed, box by box, under government control in the Falkland Islands. This measure ensures that buyers and consumers that the certified catch does not come from vessels fishing illegally in other toothfish fisheries.



## Economic incentives

Most fisheries say the MSC label has helped them retain existing markets and gain access to new ones, geographically or in terms of opportunities arising from new product category developments. The **Bering Sea and Aleutian Islands Alaska cod** fishery (page 28) has achieved both. Before, its main sales were in dried cod and wet salted fillets. Since certification, it has broken into the double-frozen, value-added, breaded-and-battered market and has expanded its market to include countries in Europe. The **Germany North Sea saithe** fishery (page 66) used to rely

entirely on fresh fish sales. Now, it is winning freezing contracts for fillets – a totally new market area – because German retailers (notably the big discounters, Aldi and Lidl) are requesting MSC-certified frozen product. In Bristol Bay, Alaska, demand from big retailers has led producers of **Alaska salmon** (page 12) away from lower-value canning and into value-added markets such as filleting, chilling and freezing.

Some fishers reported price premiums. The main beneficiaries have been smaller-scale, artisanal fisheries – many of which have survived and prospered as a result of more favourable prices. In Australia, the **Lakes and Coorong** fishery (page 54) says it regularly commands premiums of 30 to 50 per cent for MSC certified versus non-certified seafood sold to restaurants in Sydney and Melbourne. In a community where fishing and related services account for 60 per cent of household income, this is vital. In Britain, the **NESFC sea bass** fishery (page 48) has reported premiums of up to 25 per cent, compared to local values prior to certification, when selling to top London restaurants. Also in Britain, the **Hastings Dover sole, herring and mackerel** fisheries (page 30) typically received a 10 per cent premium on product sold to The Netherlands and have been offered up to 15 per cent by the Casino supermarket group in France. In the United States, the **American Albacore Fishing Association (AAFA) Pacific tuna** fisheries (page 46) saw its prices increase from US\$1,700 to US\$2,250 a tonne as soon as it became MSC certified in August 2007. Guaranteed a market in Europe, the AAFA could for the first time in its history set a stable price for the future, instead of relying on a volatile dockside trading system.

The **Western Australia rock lobster** fishery (page 8) is a good example of how fisheries can experience economic benefits

beyond price premiums. When the Australian government implemented legislation requiring businesses to be audited and certified in order to export seafood, MSC certification was accepted as an alternative mechanism to meet this requirement, saving the fishery the costs of export certification.



## Social benefits

Certification can also bring social benefits. If fishery resources are managed sustainably, this should improve the security of the livelihoods of the fishing communities who depend upon them. This is particularly true for smaller-scale, artisanal fisheries such as the **Loch Torridon nephrops** fishery (page 20) in Scotland, UK and the **American Albacore Fishing Association (AAFA) Pacific tuna** (page 46) fisheries in the US.

The **Mexican red rock lobster** fishery (page 26) provides a powerful example of MSC certification contributing to the delivery of wider social benefits through community empowerment. Engagement in the MSC programme put the ten villages supported by this small, community-based fishery on the federal government's map. This resulted in increased government attention and better provision of essential services, such as a \$20 million grant for electricity and government help with infrastructure, access roads and drinking water.

## Influence on policy

Again, the experience of the **South Africa hake** fishery (page 24) is pertinent. In response to one MSC condition, it introduced tori lines (streamers flown from vessels to keep birds away from bait and gear) on a voluntary basis. These are now mandatory on all trawling vessels in South Africa, an example of how fisheries in the MSC programme can influence government policy. South African fisheries managers also recognise that long-term collaboration opportunities have been fostered as a result of the MSC assessment process. In Europe, where most of the major **herring fisheries** (pages 30, 38, 52 and 58) are either MSC certified or under assessment, their critical mass has changed the mood of EU fishing negotiations. Quotas and other business are now handled in a more precautionary way, with the judgment of the MSC certifiers in mind.

The **Western Australia rock lobster** fishery (page 8) found MSC certification a powerful bargaining tool that helped reduce tariffs for seafood imported into the EU by half – savings that offset some of the certification costs.

It all goes to show that, over the past 10 years, the MSC programme has been helping in ways that go way beyond the simple measure of a price premium. Here, the MSC's true advocates tell the complex, enthralling story of an industry's transformation – what can only be described as a sea change.

# Map of MSC Certified Sustainable Fisheries

- Fishery**
- 1 Alaska salmon
  - 2 American Albacore Fishing Association Pacific albacore tuna - north and south (2 fisheries)
  - 3 Australia mackerel icefish
  - 4 Bering Sea and Aleutian Islands Alaska (Pacific) cod- freezer longline
  - 5 Bering Sea/Aleutian Islands pollock
  - 6 Burry Inlet cockles
  - 7 Gulf of Alaska pollock
  - 8 Hastings fleet Dover sole, herring and mackerel (3 fisheries)
  - 9 Lake Hjälmaren pikeperch fish-trap and gill-net (2 fisheries)
  - 10 Mexico Baja California red rock lobster
  - 11 New Zealand hoki
  - 12 North Eastern Sea Fisheries Committee sea bass
  - 13 Oregon pink shrimp
  - 14 Patagonian scallop
  - 15 Pelagic Freezer-Trawler Association North Sea herring
  - 16 South Africa hake trawl (2 fisheries)
  - 17 South Georgia Patagonian toothfish longline
  - 18 South-west handline mackerel
  - 19 Thames Blackwater herring drift-net
  - 20 US North Pacific halibut
  - 21 US North Pacific sablefish
  - 22 Western Australia rock lobster
  - 23 Astrid Fiske North Sea herring
  - 24 Canada northern prawn
  - 25 Domstein Longliner Partners North East Arctic cod and haddock (2 fisheries)
  - 26 Germany North Sea saithe trawl
  - 27 Gulf of St Lawrence northern shrimp
  - 28 Gulf of St Lawrence northern shrimp trawl Esquiman Channel
  - 29 Kyoto Danish Seine Fishery Federation snow crab and flathead flounder (2 fisheries)
  - 30 Lakes and Coorong, South Australia
  - 31 Norway North Sea saithe and Norway north-east Arctic saithe (2 fisheries)
  - 32 Scottish Pelagic Sustainability Group (SPSG) North Sea herring
  - 33 Scottish Pelagic Sustainability Group (SPSG) western component of north east Atlantic mackerel
  - 34 Loch Torridon nephrops creel

