SEAFOOD FUTURES FORUM 2023

TOWARDS A BLUE FOOD FUTURE

IS THE SEAFOOD INDUSTRY READY FOR TRANSFORMATION?
WELCOME TO SEAFOOD FUTURES FORUM 2023
Please take your seats

#SFF2023
TOWARDS A BLUE FOOD FUTURE
IS THE SEAFOOD INDUSTRY READY FOR TRANSFORMATION?

09:05  –  Welcome and introduction, Rupert Howes, Chief Executive, MSC

09:15  –  Keynote presentation, Professor Manuel Barange, UN FAO Director of Fisheries and Aquaculture

09:30  –  Growth in sustainable seafood, Nicolas Guichoux, Chief Programme Officer, MSC

09:45  –  Questions from the audience

10:00  –  Finish
HOW TO GET INVOLVED

Wi-Fi:
Free_WIFI_Seafood
Share and follow on social media:
#SFF2023
@MSCecolabel

FOR THOSE ONLINE:
Please ask questions via Vimeo
WELCOME

Rupert Howes, CEO,
Marine Stewardship Council
Before the recent rise, CO$_2$ fluctuated by about 80ppm in connection with the ice ages.
The pressure is increasing

Source: open.edu
Fisheries meeting the MSC Fisheries Standard are helping to deliver on at least 34 different SDG targets.
RECENT MILESTONES IN INTERNATIONAL COLLABORATION

8 June 2022: UN Blue Transformation Roadmap

17 June 2022: Agreement to end harmful fisheries subsidies

19 December 2022: UN Global Biodiversity Framework agreed

6 March 2023: High Seas Treaty agreed

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25 YEARS OF PARTNERSHIP

19% of wild marine catch engaged
659 fisheries engaged
2,087 fishery improvements made
$12.6 billion retail sales value

*engaged = certified, suspended, and in assessment; Fishery data March 2023 and FAO 2022, improvement data as of March 2022, retail sales forecast for 2022/23.

#SFF2023
OUR NEW STRATEGIC PLAN

OUR VISION
For the world’s oceans to be teeming with life, and seafood supplies safeguarded for this and future generations

2030 GOAL
Over one-third of global marine catch comes from MSC certified or engaged fisheries, supporting productivity and resilience in the world’s oceans

- Recognising and rewarding sustainable fisheries and incentivising improvement globally
- Ensuring MSC Standards and certifications are highly credible and reflect global best practice
- Cultivating and expanding sustainable seafood markets
- Building public awareness and support and demonstrating science and impact
- Amplifying policy advocacy activity and deepening engagement with broader range of stakeholders

#SFF2023
BLUE TRANSFORMATION: BUILDING A WORLD WITHOUT HUNGER AND POVERTY WITH AQUATIC FOODS

Professor Manuel Barange,
United National Food and Agriculture Organisation
BLUE TRANSFORMATION:
Building a world without hunger and poverty with aquatic foods

Manuel Barange
Director, Fisheries and Aquaculture Division
FAO, Rome, Italy
THE GROWING CHALLENGE TO FEED THE WORLD

Undemourished (millions)

% Population unable to afford a healthy diet (by country, 2020)

© FAO data
AFFORDABILITY OF AQUATIC FOODS

Food Price Index
(100=2014-2016)

FAO Food Price Index  
Capture  
Aquaculture

© FAO data
AQUATIC FOODS: INCREASING FOCUS

Average global annual growth rate - 2010-2020

- Capture fisheries - inland waters
- Capture fisheries - marine waters
- Aquaculture - inland waters
- Aquaculture - marine waters

Million tonnes

Population

Total proteins
Animal proteins
Fish proteins
Other animal proteins
Non-animal proteins
AQUATIC FOODS: LOW ENVIRONMENTAL FOOTPRINT

Conversion Efficiency (kg feed/ Kg live weight)

GHG Emissions Intensity (g CO2 eq./g protein)

© Fry et al. 2018

© Petsko 2021
CAPTURE FISHERIES: GLOBALLY STABLE BUT DYNAMIC

Global Capture Production: 1950 - 2020
Production of top 15 countries over time.

- Japan
- United States of America
- Norway
- Canada
- United Kingdom
- China
- India
- Spain
- Germany
- France
- Iceland
- South Africa
- Portugal
- Denmark

Source: FAO - Data only includes aquatic animals. Units: tonnes - live weight.
Global capture fisheries and aquaculture production, 1990–2030

Present and future FAO expectations of per capita consumption of fish

<table>
<thead>
<tr>
<th>Region</th>
<th>2020</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>World</td>
<td>20.2kg</td>
<td>21.4kg</td>
</tr>
<tr>
<td>Africa</td>
<td>9.9kg</td>
<td>9.8 kg</td>
</tr>
<tr>
<td>S-S Africa</td>
<td>8.6kg</td>
<td>8.4 kg</td>
</tr>
</tbody>
</table>

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A VISION FOR A MORE SUSTAINABLE, PRODUCTIVE, EQUITABLE AND IMPACTFUL SECTOR.
AQUATIC SYSTEMS AS A SOLUTION: THE NEED FOR BLUE TRANSFORMATION

OBJECTIVE 1
Sustainable aquaculture intensification and expansion satisfies global demand for aquatic foods and distributes benefits equitably.

OUTCOME
Sustainable aquaculture production grows by at least 35 percent by 2030, especially in food deficient regions.

OBJECTIVE 2
Effective management of all fisheries delivers healthy stocks and secures equitable livelihoods.

OUTCOME
100 percent of marine and inland fisheries is under effective management and IUU fishing is eradicated.

OBJECTIVE 3
Upgraded value chains ensure the social, economic and environmental viability of aquatic food systems.

OUTCOME
Loss and waste halved by 2030, more transparency and traceability, better market access, more equitable returns.
Marine Fisheries Sustainability (global average all stocks)

- Overfished
- Maximally sustainably fished
- Underfished

64.6% of stocks by number
82.5% of landings by volume

50% of fisheries catch is from scientifically assessed stocks, which are rebuilding.

© FAO SOFIA 2022
ROLE OF BUSINESS IN BLUE TRANSFORMATION

BLUE TRANSFORMATION

Roadmap 2022–2030
A vision for FAO’s work on aquatic food systems

BY 2030
EFFICIENT, INCLUSIVE
RESILIENT AND
SUSTAINABLE AQUATIC
FOOD SYSTEMS
BLUE TRANSFORMATION: MEETING EXPECTATIONS

Per capita consumption (kg/yr)
(Scenarios to 2050)

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Thank you for your attention
THE MSC’S CONTRIBUTION TO THE BLUE TRANSFORMATION

Nicolas Guichoux,
Chief Programme Officer,
Marine Stewardship Council
**Engagement in the MSC Programme**

- **659** Fisheries engaged
- **42** New certified fisheries
- **62** Successfully reassessed fisheries

*Figures for 1 April 2022 to 31 March 2023. Fisheries in the MSC programme include those certified, suspended, or in assessment to the MSC Standard. Different species and stock units are identified and counted as different ‘fisheries’*
*2022 and 2023 data is indicative. Engaged = certified, suspended and in assessment; certified includes suspended fisheries.
2,969,000 tonnes MSC engaged catch

151 MSC engaged fisheries

59% of global wild tuna catch from MSC engaged fisheries

*engaged means certified, suspended or in assessment to MSC
**as of UN FAO data, 2020

Data correct as of 31 March 2023
A new era for the management of Atlantic bluefin tuna has started

'Seminal Moment' Towards Sustainably Managing Atlantic Bluefin Tuna

WCPFC adopts non(binding) skipjack tuna harvest strategy

2022 was a big year for harvest strategies, and 2023 could be even bigger
INCREASING INTEREST IN LATIN AMERICA
INCREASING INTEREST IN INDONESIA
MARKET TRENDS, NEW COMMITMENTS
20,000 products with the blue MSC label

70+ nations where consumers can buy MSC labelled products

1,217,000 tonnes 2022-2023 volume of sales

£7.3 billion 2022-2023 wholesale value

*Actual data reported to 31 March 2022, with forecasts for 2022/2023
*Actual data reported to 31 March 2022, with forecasts for 2022/2023
Top 10 MSC Labelled Product Categories

Wholesale value of MSC labelled sales (£ million)

*Actual data reported to 31 March 2022, with forecasts for 2022/2023
Top 10 regions for MSC labelled sales

Wholesale value of MSC labelled sales (£million)

- DACH
- US & Canada
- UK/Ireland
- France
- Scandinavia
- Benelux
- Italy
- Central Europe
- Spain & Portugal
- Australia
- Japan
- China

*Actual data reported to 31 March 2022, with forecasts for 2022/2023
GROWTH IN SOUTHERN EUROPE

SPAIN & PORTUGAL

ITALY

FRANCE

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COMMITMENTS TO MSC IN FRANCE

**LIDL**
71% of the wild fish references are MSC labelled for chilled and frozen products.

**CARREFOUR**
100% of its fish counters in Carrefour and Carrefour Market stores have been MSC certified since 2019. 100% of Carrefour frozen hake products are MSC-certified.

**SAUPIQUET**
100% of Saupiquet tuna products use the MSC label in France.

**FINDUS**
100% of Findus products have used the MSC label since 2019.

**E.LECLERC**
100% of Alaska hake, wild salmon, lumpfish and surimi products for E.LeClerc’s own brand are MSC-certified.

**LABEYRIE FINE FOODS**
100% of its wild salmon and cod use the MSC label.
SEMAINE DE LA PÊCHE ET DE L’AQUACULTURE RESPONSABLES

NOUS AVONS TOUS UN RÔLE À JOUER

SEMÉCIA DE LA PÊCHE ET DE L’AQUACULTURE RESPONSABLES

#SFF2023
FINDUS
Leading brand in the frozen category. Committed to transition all its Capitan Findus products to MSC certification by 2025.

BOLTON
Leading canned tuna brand in Italy. Committed to source all seafood products from FIP or MSC certified fisheries by 2025.

FROSTA
A very important brand and supplier for PL in the frozen category in Italy. Committed to make all products 100% MSC or ASC certified.

LIDL
Retailer with the highest number of MSC products. Committed to source 80% of its seafood products from sustainable sources by 2024.

CONAD
Largest Italian retailer with more than 3,300 POS and 23% of market share. Doubling the volume of MSC products.

ALDI
Increased its range of MSC-certified products by 60% last year in volume and value.
• Leading the growth of the sustainable tuna market in Italy.

• Aims to source all its seafood products from FIP or MSC certified fisheries by 2025.

• 85% of its seafood offering comes from MSC or FIP sources
COMMITMENTS TO MSC IN PORTUGAL

LIDL
Leading retailer for MSC in volume. Achieved 100% labelled MSC cod in 2016.

CONTINENTE
Leading retailer in market share. First retailer to obtain MSC/ASC CoC for fish counters in Portugal.

ALDI
100% of its cod uses the MSC label. MSC First retail brand to launch MSC-certified tinned tuna.

RIBERALVES
Leading processor worldwide for MSC cod in volume. Commitment to source MSC products for retail and Riberalves brand.

IGLO
First Iberian brand to reach 100% MSC / ASC for all SKUs.

AUCHAN
45% growth in MSC label sales for its own brand (21/22).
MSC’S INITIATIVES IN PORTUGAL

World Ocean Day

Sustainable Seafood Week

Education

Awareness

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COMMITMENTS TO MSC IN SPAIN

LIDL
More than 70 MSC products in Spain. Awarded the "MSC leading supermarket in sustainable fishing" prize.

DIA GROUP
Launched in 20 MSC labelled products under its brand in 2022. Won "Revelation Supermarket for MSC sustainable fishing in Spain prize ".

ALDI
ALDI has more than its 30% of own brand under MSC. Won the "MSC Own Brand" award.

EROSKI
Leading processor of fresh MSC certified products. Awarded with the “Fish counter MSC certified” award.

FINDUS
Launched new MSC-certified sustainable collection of seafood with seven new products.

EL CORTE INGLÉS
Achieved MSC chain of custody of its fresh fish counters in early 2023.
<table>
<thead>
<tr>
<th></th>
<th>Recognition as a Trusted Ecolabel</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Pesca sostenible certificada</td>
</tr>
<tr>
<td>2</td>
<td>Cosméticos y detergentes naturales ecológicos</td>
</tr>
<tr>
<td>3</td>
<td>Ecolabel Unión Europea</td>
</tr>
<tr>
<td>4</td>
<td>Comercio Justo</td>
</tr>
<tr>
<td>5</td>
<td>Papel y madera sostenible</td>
</tr>
<tr>
<td>6</td>
<td>Textiles de confianza sin sustancias nocivas</td>
</tr>
</tbody>
</table>
GROWTH IN THE USA

USA
### Commercial Partners in USA

<table>
<thead>
<tr>
<th>Partner</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Walmart</strong></td>
<td>Top MSC partner in the US by volume. In July 2020, Walmart committed to transition sourcing for its Great Value canned tuna to MSC and FIPs working toward certification.</td>
</tr>
<tr>
<td><strong>Whole Foods</strong></td>
<td>In 1999, Whole Foods became the first US retailer to partner with the MSC.</td>
</tr>
<tr>
<td><strong>McDonald’s</strong></td>
<td>In 2013, McDonald’s USA became the first US national restaurant chain to use the MSC blue label.</td>
</tr>
<tr>
<td><strong>Meijer</strong></td>
<td>New MSC retailer partner with 240+ stores in six states, launched new in-store and online MSC signage in time for Seafood Month 2022.</td>
</tr>
<tr>
<td><strong>North Coast</strong></td>
<td>Top 4 US partner for growth in labeled products in 2022-23, with a refresh and expansion of their “Naked” frozen branded range.</td>
</tr>
<tr>
<td><strong>Safe Catch</strong></td>
<td>In 2022, Safe Catch committed to rolling out 100% of tuna and salmon products with the MSC blue fish label in 2022-23.</td>
</tr>
</tbody>
</table>
Industry Groups Join Forces to Promote Sustainable, Resilient Food Systems

Find out what Fairtrade America, the Marine Stewardship Council (MSC), and the Non-GMO Project have planned.

By Rebecca Viscomi • January 23, 2023
RESPONDING TO THE CHANGING CONSUMER LANDSCAPE
## Changing Consumer Attitudes

Claimed changes in food consumption compared to two years ago

<table>
<thead>
<tr>
<th>Food Category</th>
<th>Eat more</th>
<th>Eat less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beans and legumes</td>
<td>13%</td>
<td>24%</td>
</tr>
<tr>
<td>Poultry</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Fish or seafood</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Eggs</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Meat/dairy alternatives</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Dairy</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Pork</td>
<td>34%</td>
<td>7%</td>
</tr>
<tr>
<td>Beef</td>
<td>35%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Similar number of people eating more seafood as there are eating less

Significant claimed shift away from red meat.

Source: Globescan MSC Seafood Perceptions Survey 2022 conducted with 25,869 consumers across 23 markets globally
# Top Motivators in Purchasing Seafood

<table>
<thead>
<tr>
<th></th>
<th>Motivator</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Fresh</td>
</tr>
<tr>
<td>2</td>
<td>Good for my health / family  [↑]</td>
</tr>
<tr>
<td>3</td>
<td>Safe to eat</td>
</tr>
<tr>
<td>4</td>
<td>Taste</td>
</tr>
<tr>
<td>5</td>
<td>Price  [↑]</td>
</tr>
<tr>
<td>6</td>
<td>Sustainably sourced</td>
</tr>
<tr>
<td>7</td>
<td>Type of fish always eaten  [↑]</td>
</tr>
<tr>
<td>8</td>
<td>Is not GMO</td>
</tr>
<tr>
<td>9</td>
<td>Knowing where the product comes from</td>
</tr>
<tr>
<td>10</td>
<td>Easy to cook</td>
</tr>
</tbody>
</table>

Source: Globescan MSC Seafood Perceptions Survey 2022 conducted with 25,869 consumers across 23 markets globally
IT ALL STARTS HERE...

Help protect our Ocean
Film is here to download: video 3 (Blue Foods)
THE ROLE OF WILD SEAFOOD IN THE BLUE TRANSFORMATION
QUESTIONS AND ANSWERS

Moderator
Ishbel Matheson

Manuel Barange,
Director of Fisheries and Aquaculture, UN FAO

Nicolas Guichoux,
Chief Programme Officer, MSC

Rupert Howes,
Chief Executive, MSC
THANK YOU FOR JOINING SEAFOOD FUTURES FORUM 2023
CONTINUE THE DISCUSSION

Visit ASC and MSC in Hall 4 at stand 4A401

17.00 today: “ASC Happy Hour” offering drinks and refreshments to partners

Talk more to MSC staff
THANKS FOR COMING

Sign up to:
• Species Sourcing Events
• MSC’s newsletters

Download:
• MSC Annual Report
• Guides to MSC certification

msc.org/keepintouch
FIND OUT MORE ABOUT BLUE FOOD

msc.org/bluefood

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