

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

AGENDA



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

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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



GECERTIFICEERD
DUURZAME
VISSERIJ
MSC
www.msc.org/nl

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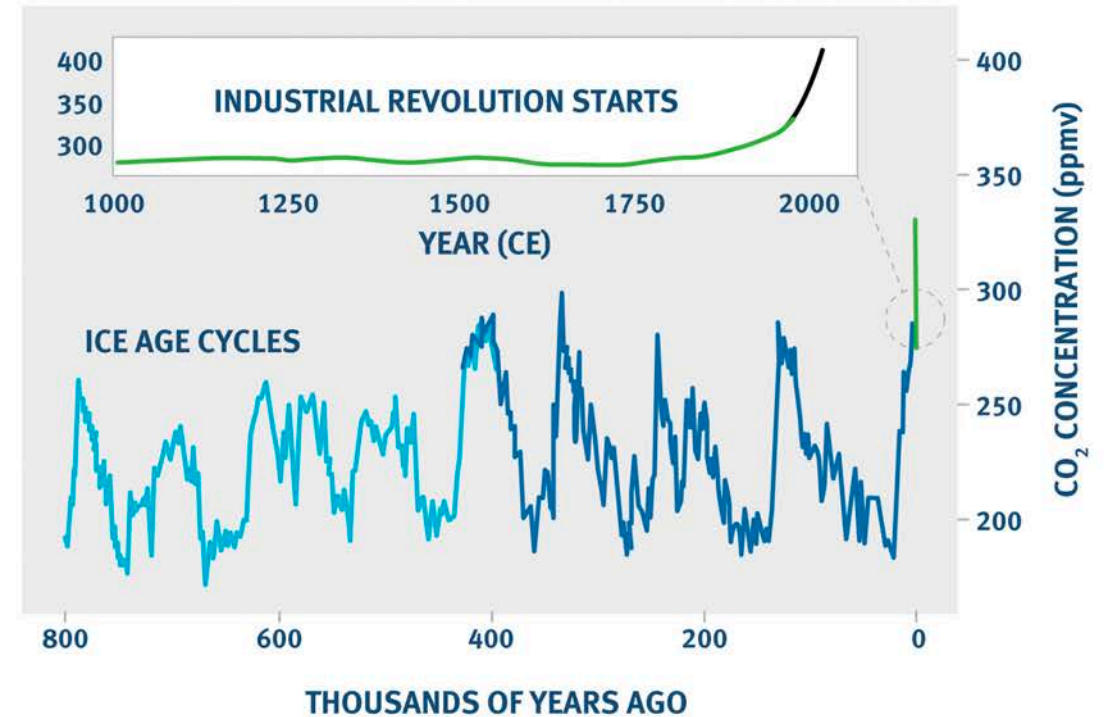
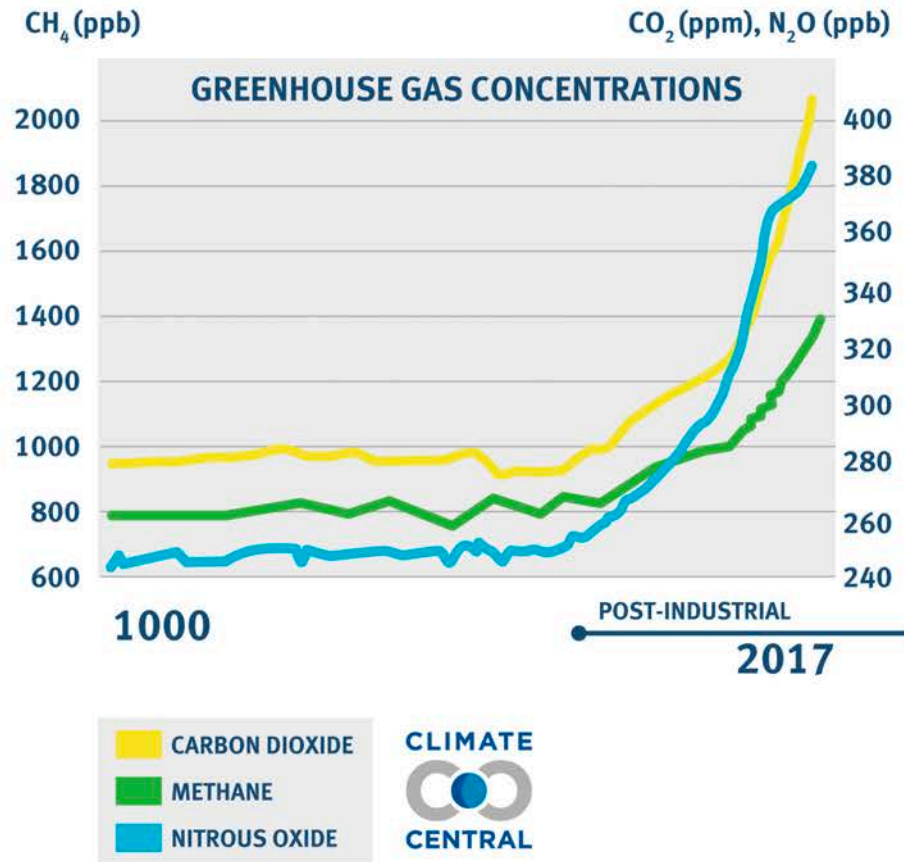


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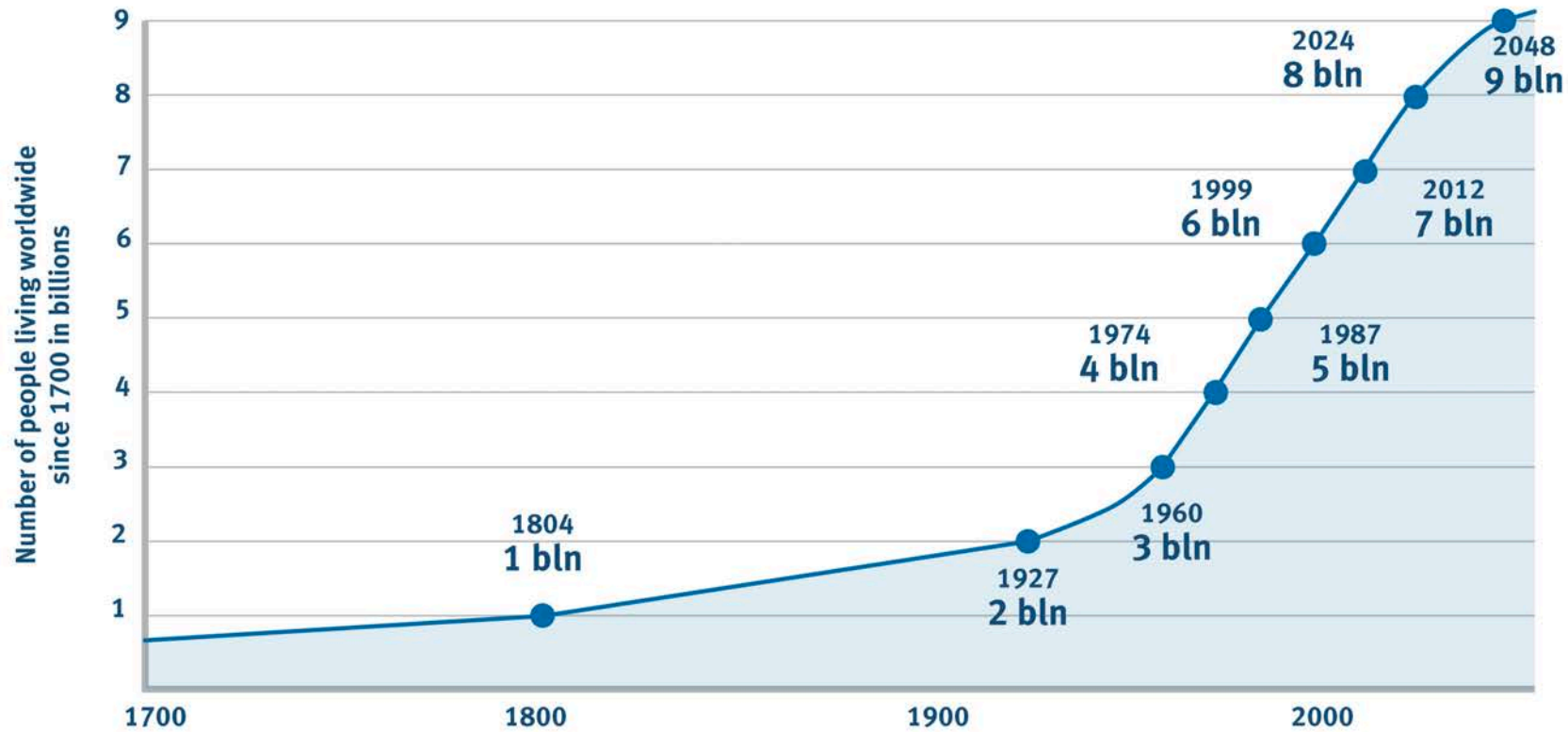
A CLIMATE CRISIS



Before the recent rise, CO₂ fluctuated by about 80ppm in connection with the ice ages

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THE PRESSURE IS INCREASING



Source: open.edu



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CONTRIBUTION TO SUSTAINABLE DEVELOPMENT



Fisheries meeting the MSC Fisheries Standard are helping to deliver on at least 34 different SDG targets.



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RECENT MILESTONES IN INTERNATIONAL COLLABORATION



8 June 2022:
UN Blue
Transformation
Roadmap



19 December 2022:
UN Global Biodiversity
Framework agreed



17 June 2022:
Agreement to end
harmful fisheries
subsidies

6 March 2023:
High Seas
Treaty agreed



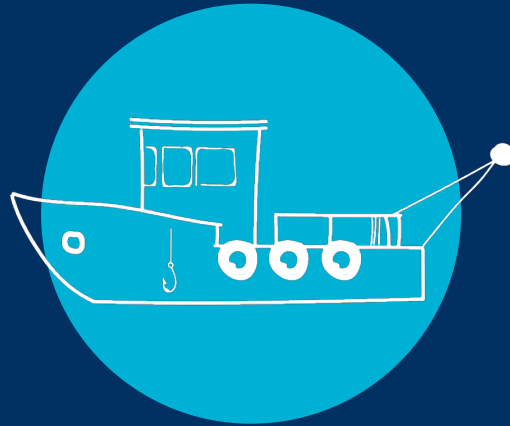
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25 YEARS OF PARTNERSHIP



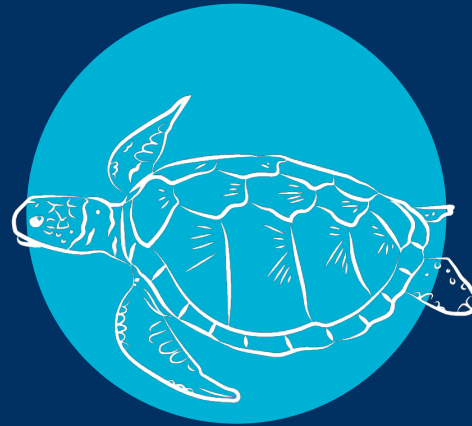
19%

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.

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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

MSC'S OCEAN STEWARDSHIP FUND



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The background of the slide is a photograph of a fishing boat deck. Several fishermen are visible, some holding up large fish (likely tuna) and smiling. The boat has green railings and fishing equipment is visible in the background.

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



Professor Manuel Barange,
United National Food and Agriculture
Organisation



Food and Agriculture Organization
of the United Nations

BLUE TRANSFORMATION: Building a world without hunger and poverty with aquatic foods

Manuel Barange

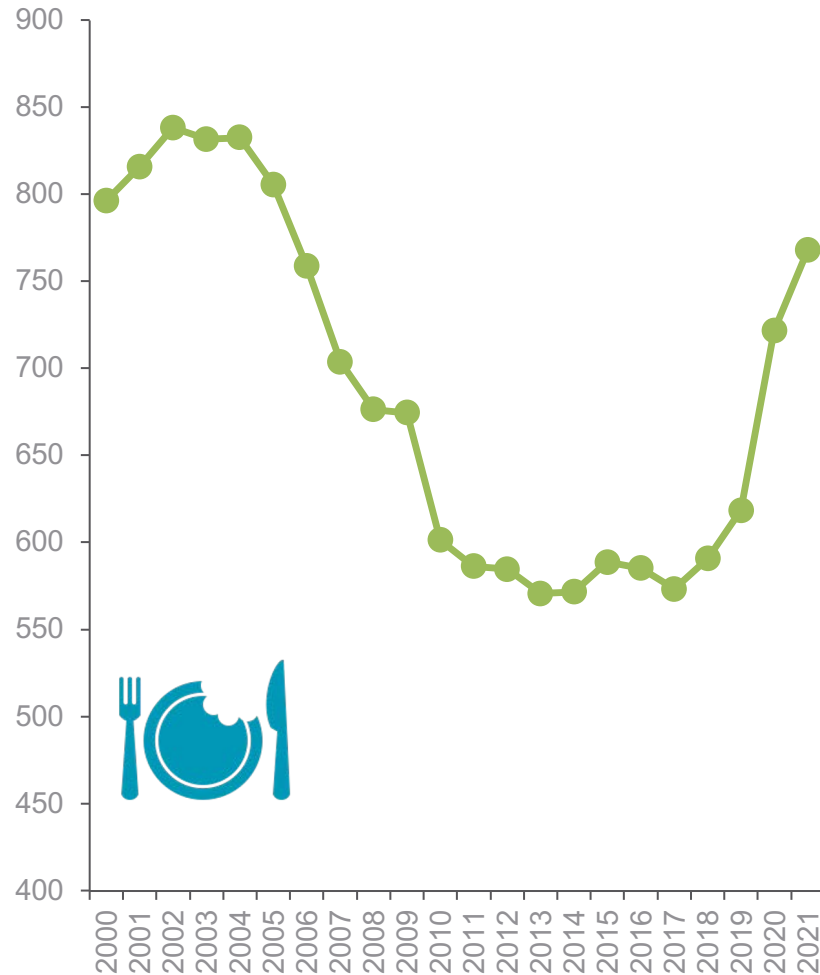
Director, Fisheries and Aquaculture Division
FAO, Rome, Italy

THE GROWING CHALLENGE TO FEED THE WORLD



Food and Agriculture Organization
of the United Nations

Undernourished (millions)



© FAO data

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

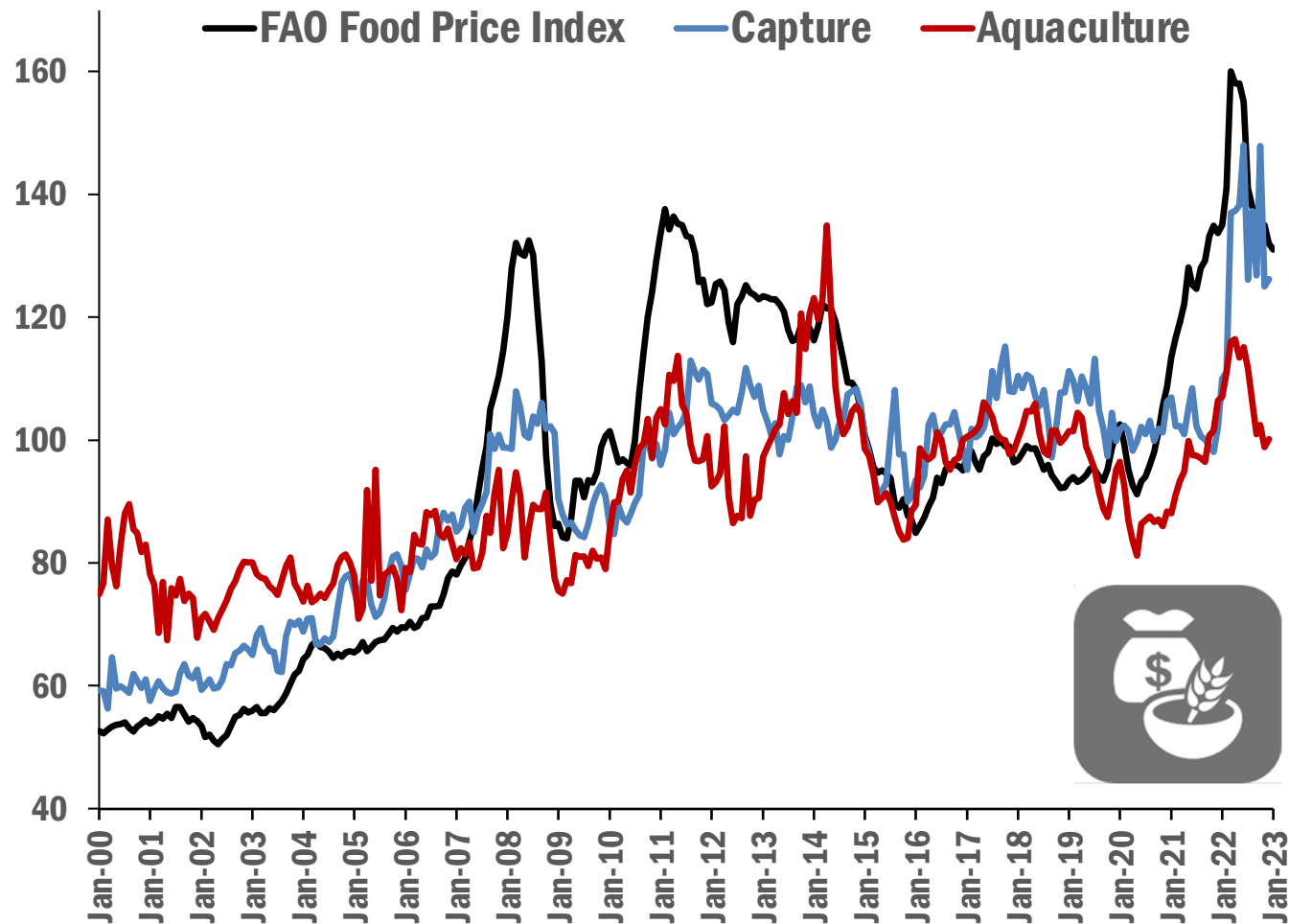


AFFORDABILITY OF AQUATIC FOODS



Food and Agriculture Organization
of the United Nations

Food Price Index
(100=2014-2016)



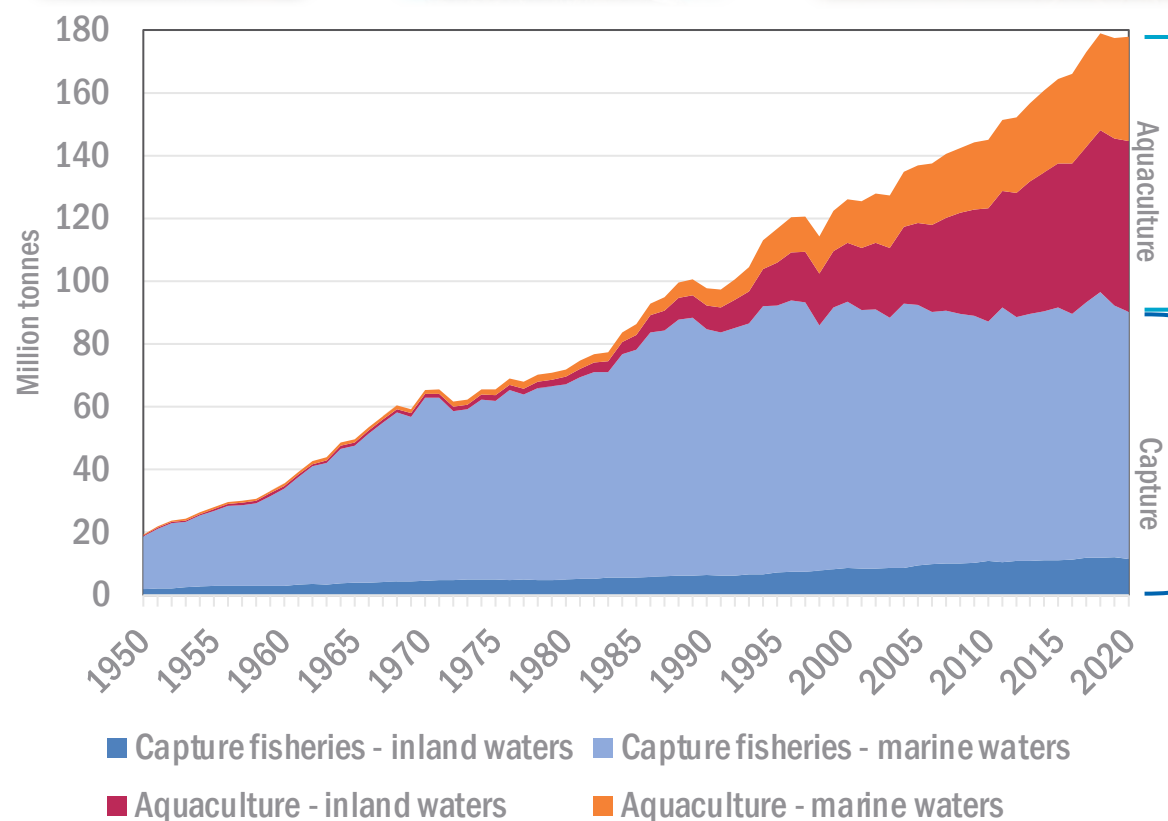
© FAO data



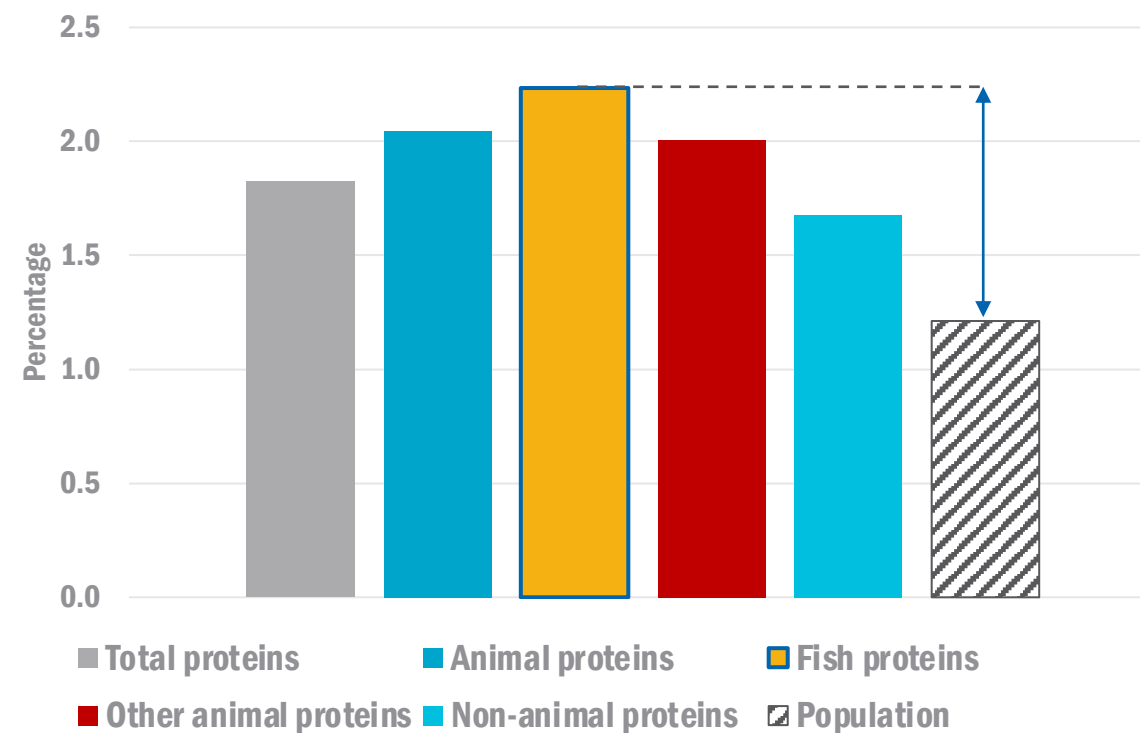
AQUATIC FOODS: INCREASING FOCUS



Food and Agriculture Organization
of the United Nations



Average global annual growth rate - 2010-2020



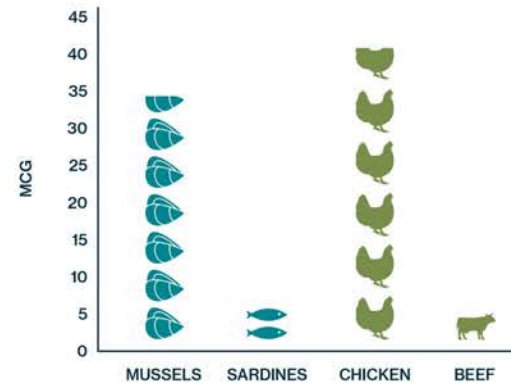
MICRONUTRIENT DEFFICIENCY: THE OTHER SIDE OF HUNGER



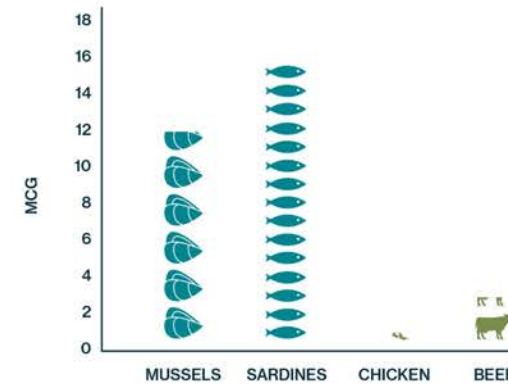
Food and Agriculture Organization
of the United Nations



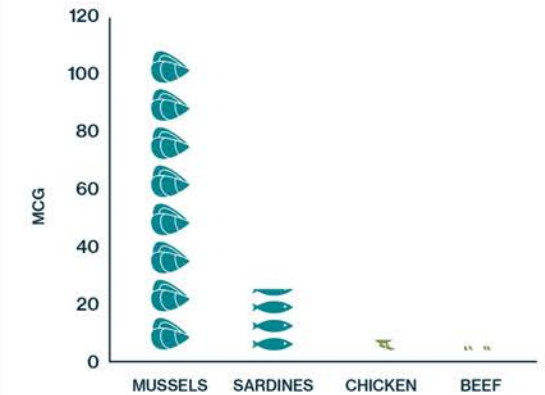
VITAMIN A (mcg per 100g serving)



VITAMIN B12 (mcg per 100g serving)



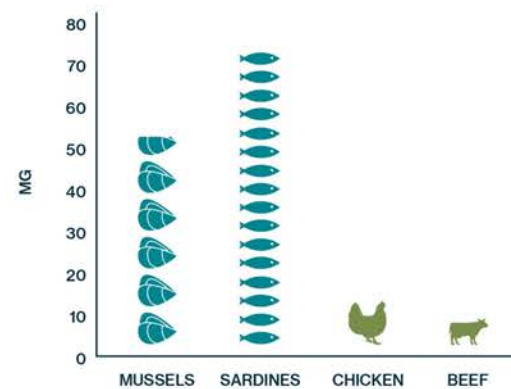
IODINE (mcg per 100g serving)



ZINC (mg per 100g serving)

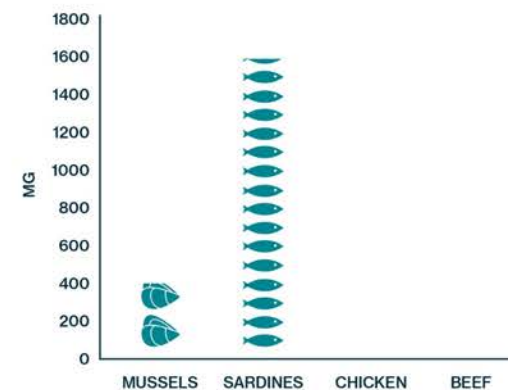


CALCIUM (mg per 100g serving)

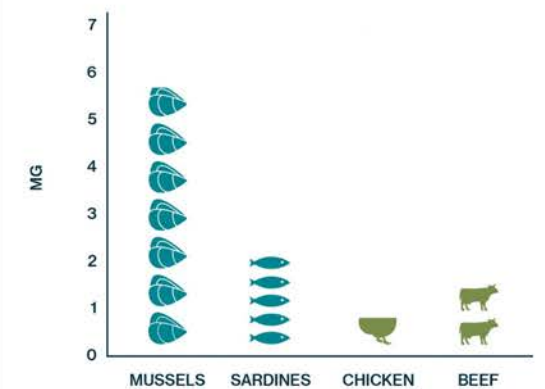


OMEGA-3 FATTY ACIDS

(mg per 100g serving, EPA and DHA only)



IRON (mg per 100g serving)

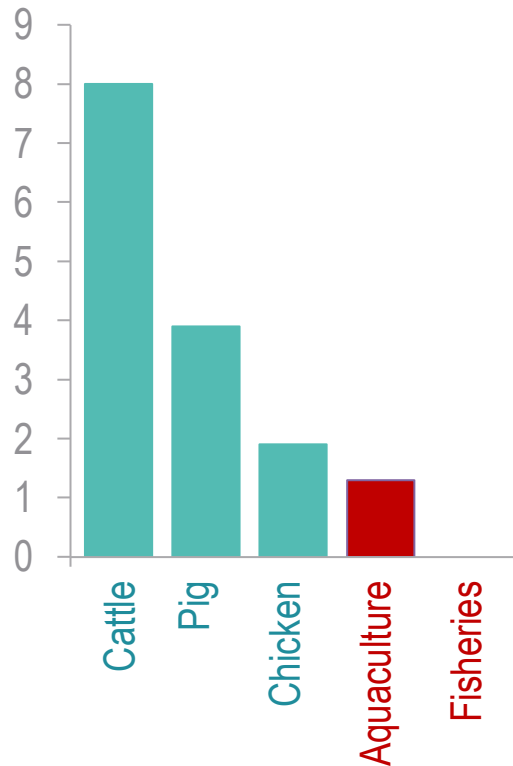


AQUATIC FOODS: LOW ENVIRONMENTAL FOOTPRINT

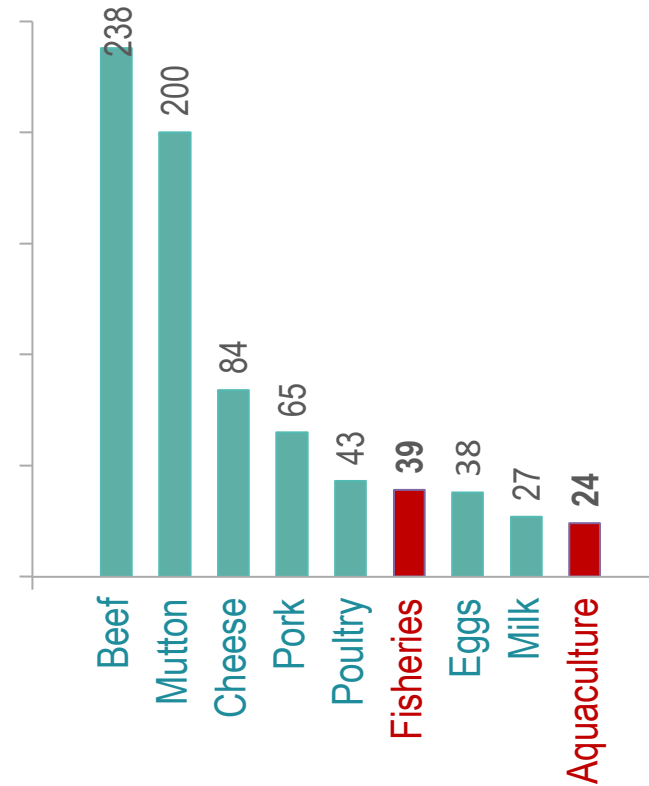


Food and Agriculture Organization
of the United Nations

Conversion Efficiency
(kg feed/ Kg live weight)



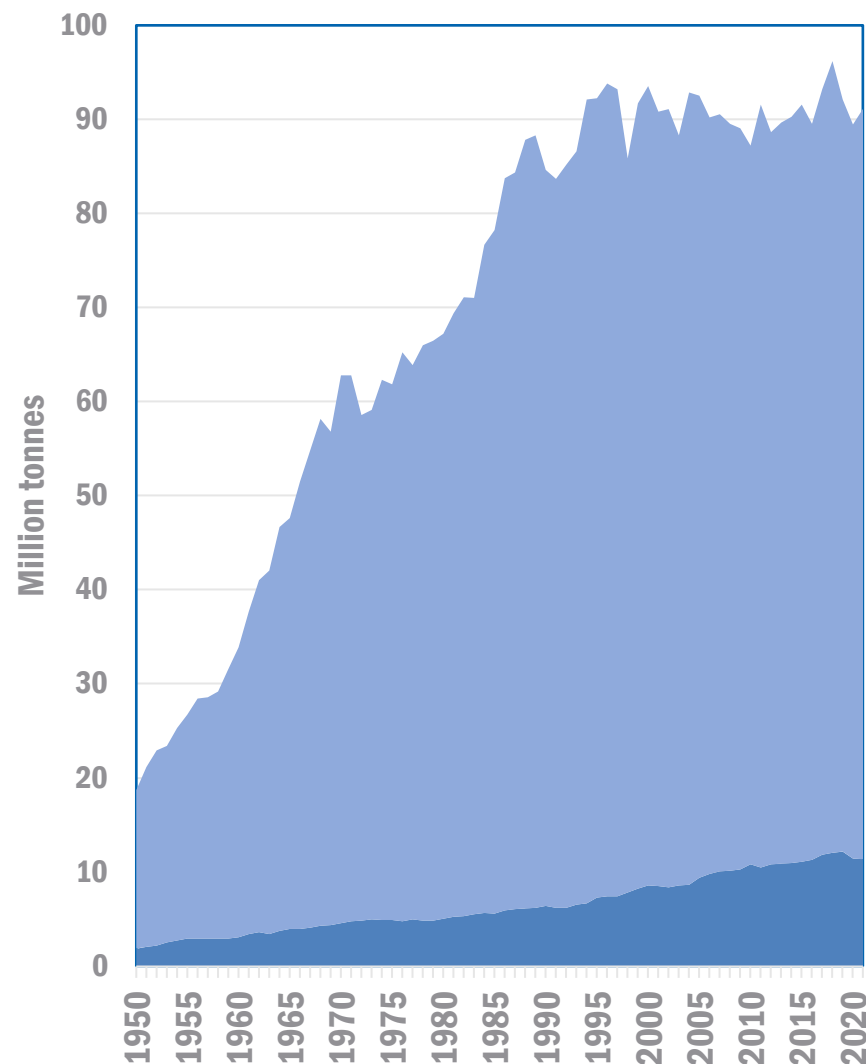
GHG Emissions Intensity
(g CO₂ eq./g protein)



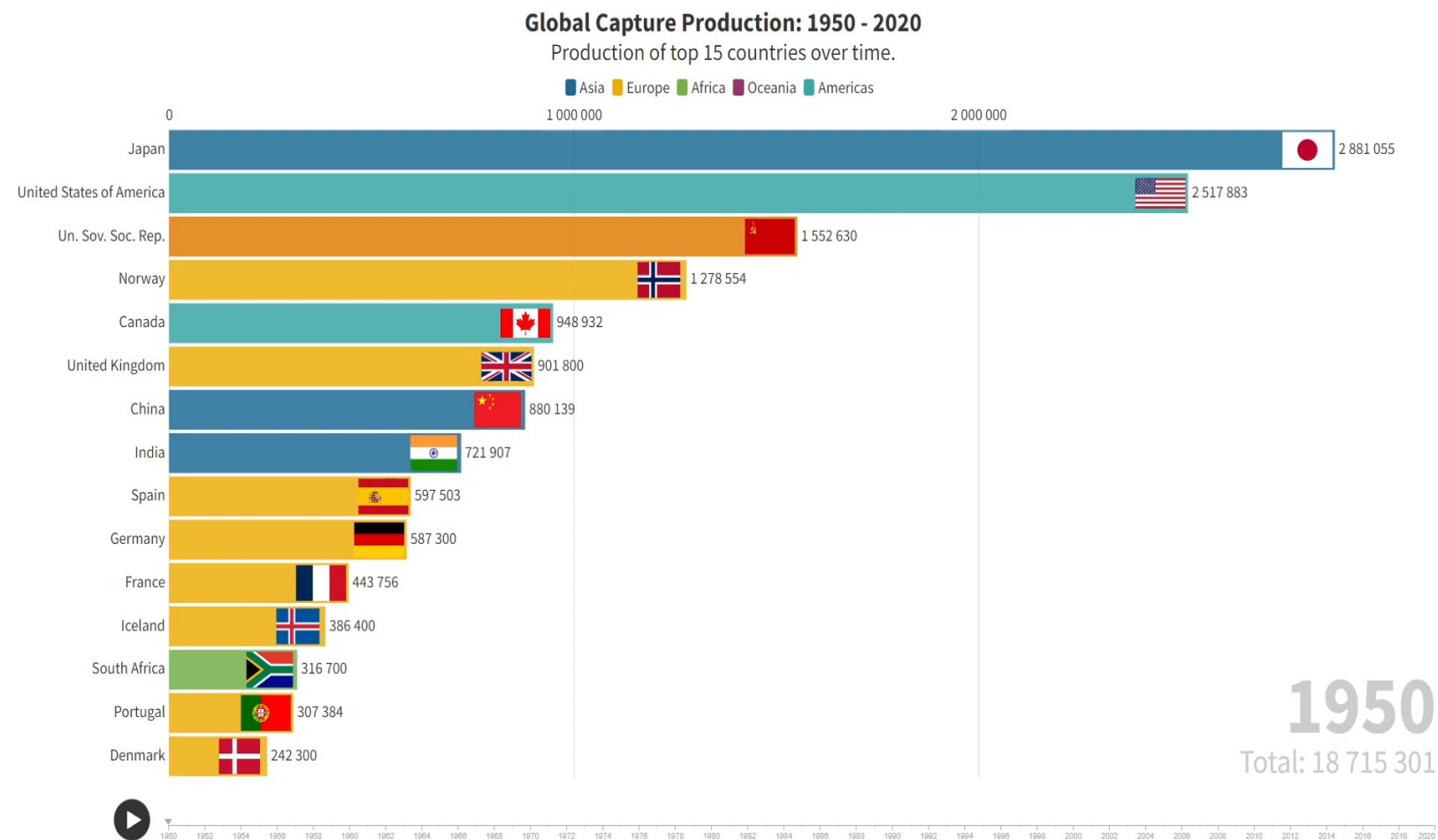
CAPTURE FISHERIES: GLOBALLY STABLE BUT DYNAMIC



Food and Agriculture Organization
of the United Nations

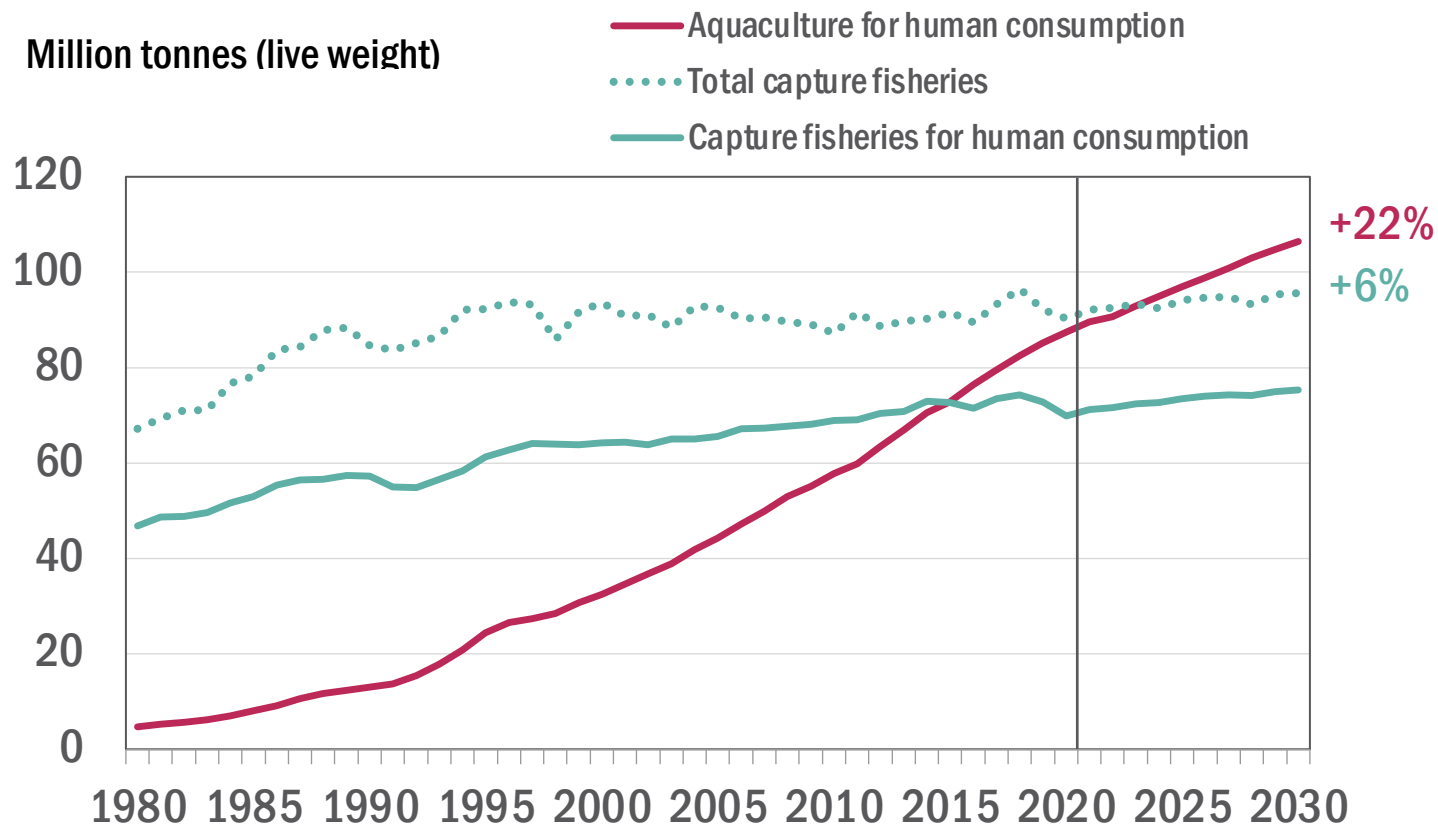


- Capture fisheries - marine waters
- Capture fisheries - inland waters



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

	2020		2030
World	20.2kg	→	21.4kg
Africa	9.9kg	→	9.8 kg
S-S Africa	8.6kg	→	8.4. kg



BLUE TRANSFORMATION

A VISION FOR A MORE
SUSTAINABLE, PRODUCTIVE,
EQUITABLE AND IMPACTFUL
SECTOR.



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

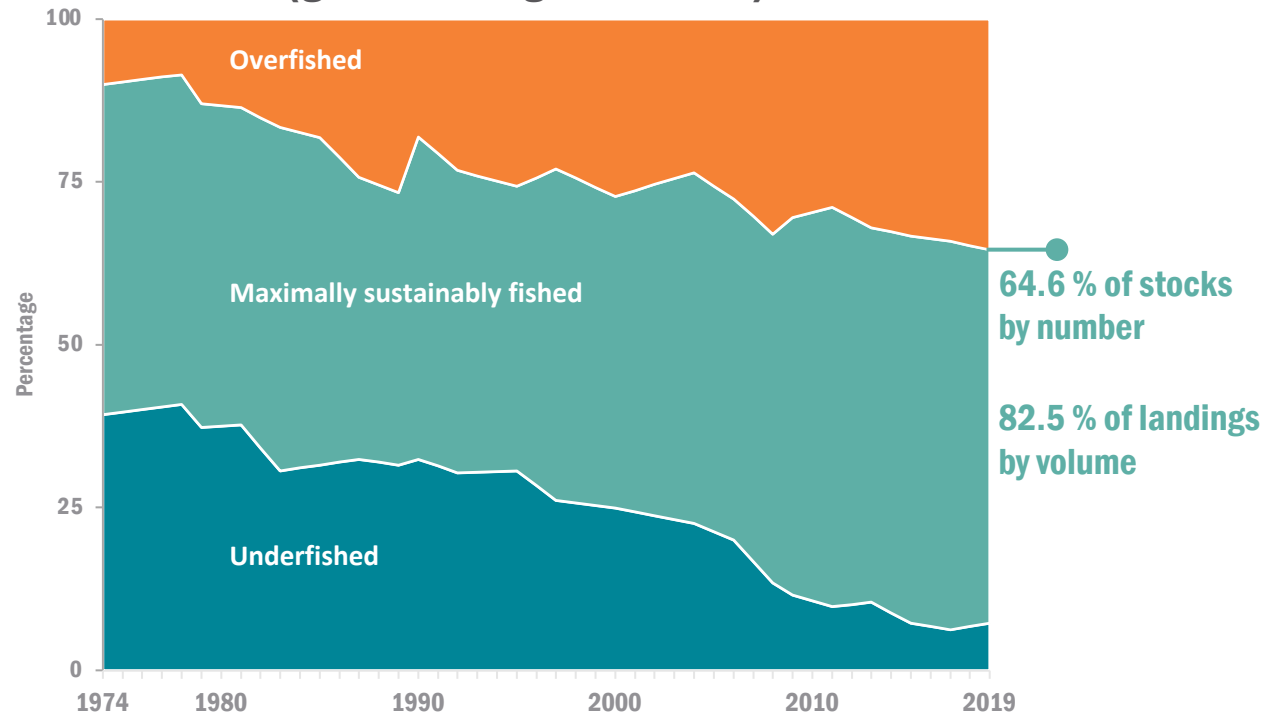
Upgraded value chains ensure the social, economic and environmental viability of aquatic food systems.

OUTCOME

Loss and waste halved by 2030, more transparency and traceability, better market access, more equitable returns.

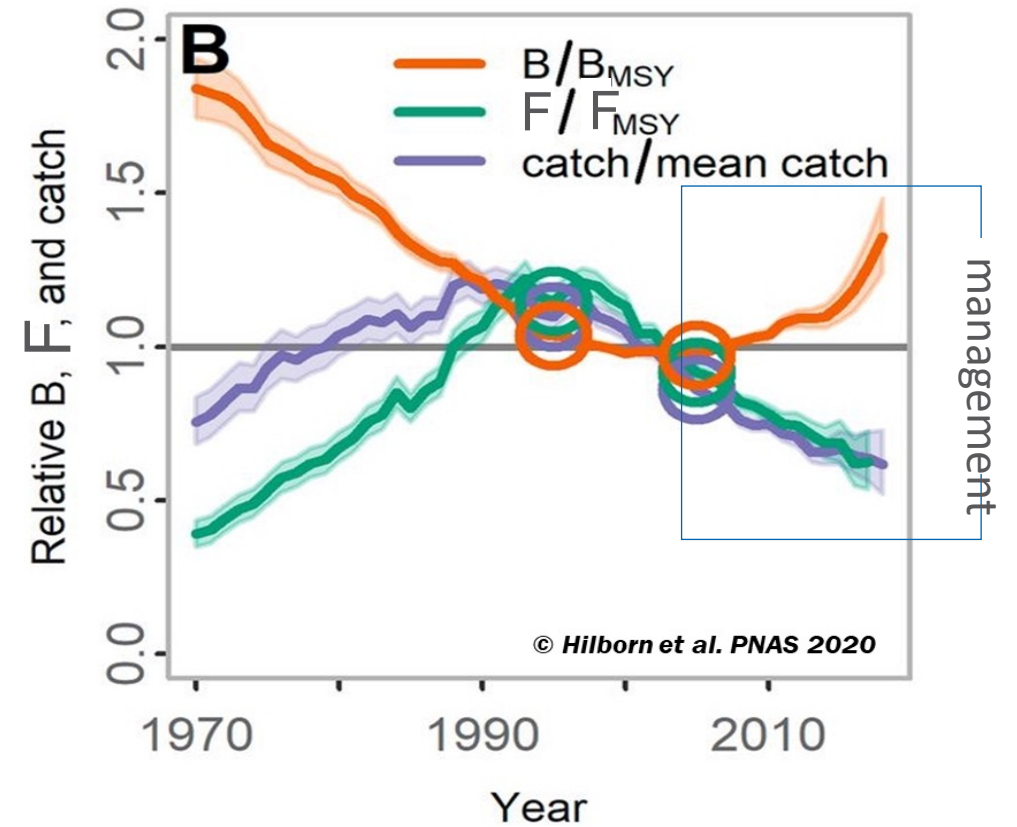
SUSTAINABLE FISHERIES – Why the emphasis on management?

**Marine Fisheries Sustainability
(global average all stocks)**



© FAO SOFIA 2022

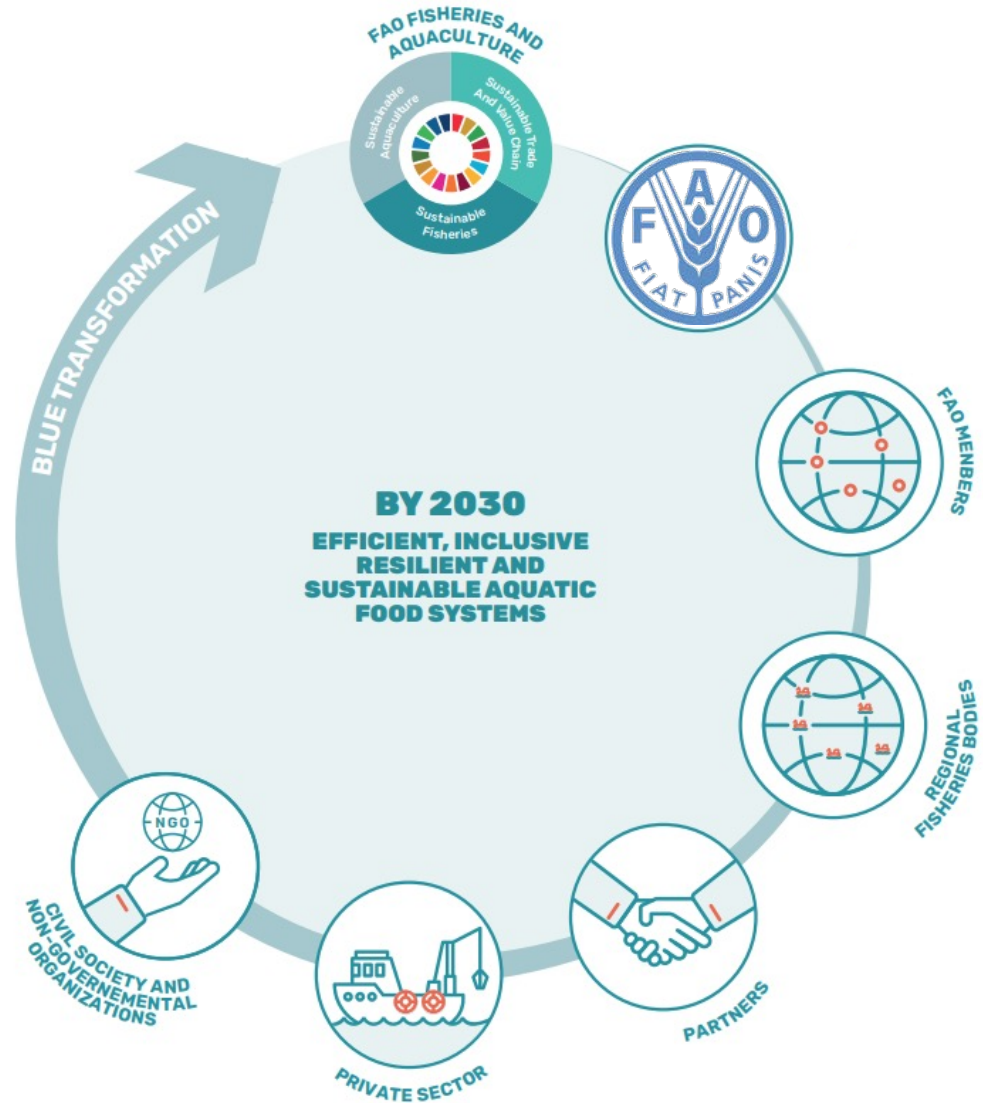
50% of fisheries catch is from scientifically assessed stocks, which are rebuilding



ROLE OF BUSINESS IN BLUE TRANSFORMATION



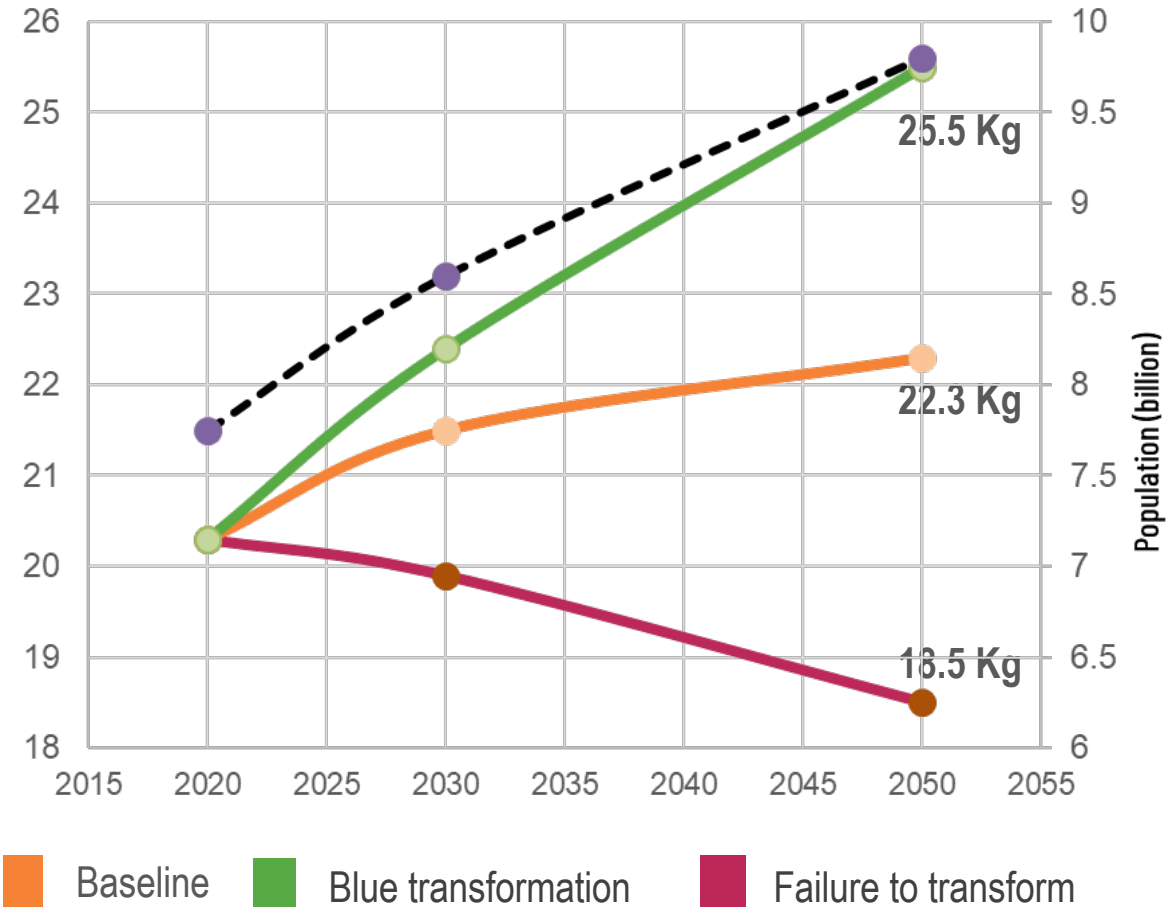
Food and Agriculture Organization
of the United Nations





© FAO SOFIA 2022

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





Food and Agriculture Organization
of the United Nations

Thank you for your attention





THE MSC'S CONTRIBUTION TO THE BLUE TRANSFORMATION



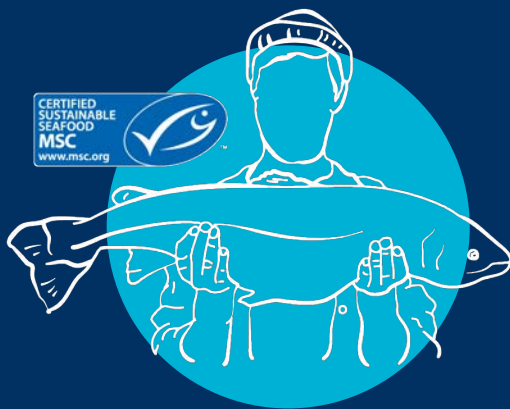
Nicolas Guichoux,
Chief Programme Officer,
Marine Stewardship Council

ENGAGEMENT IN THE MSC PROGRAMME



659

Fisheries engaged



42

New certified
fisheries



62

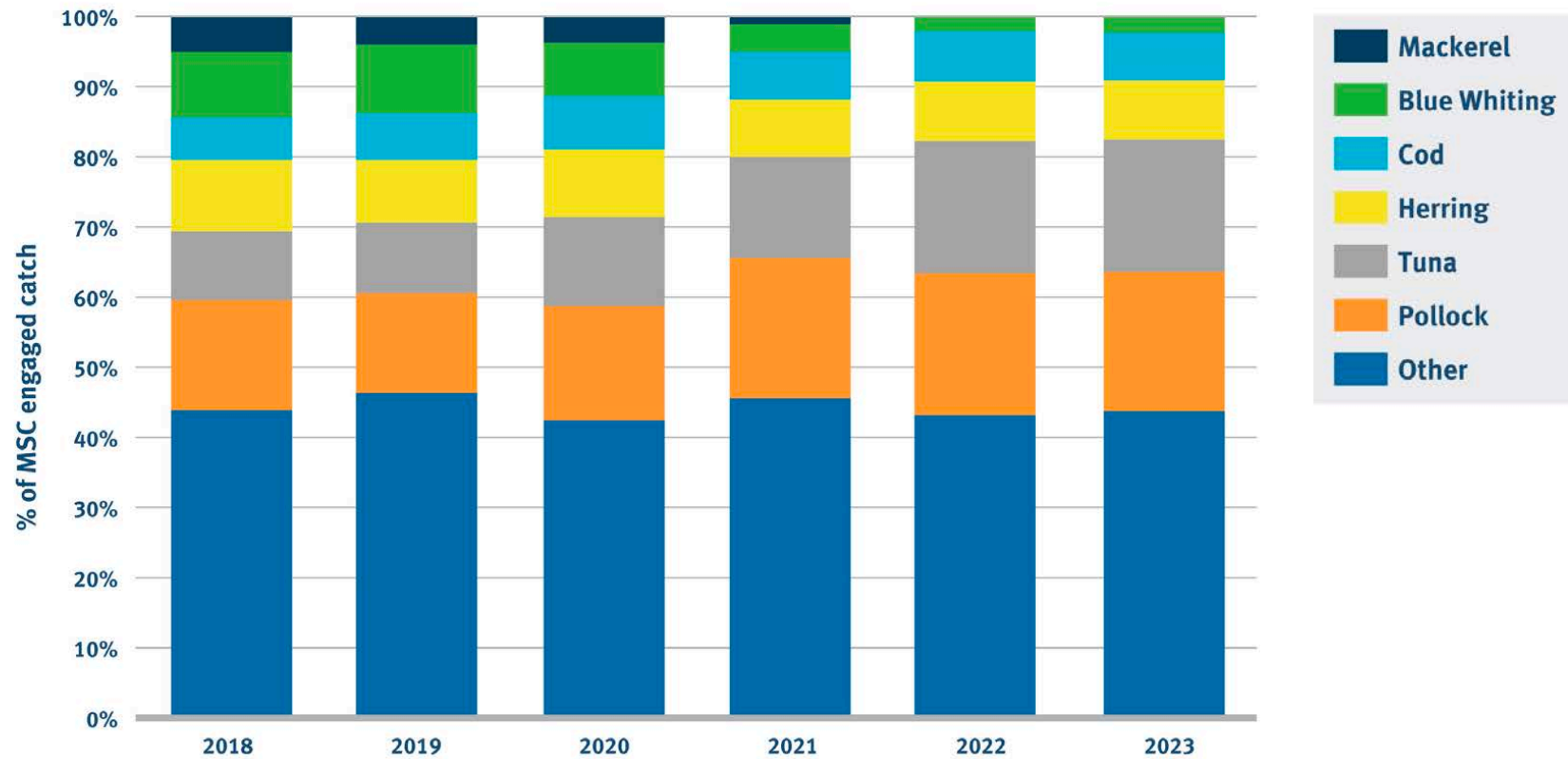
Successfully reassessed
fisheries



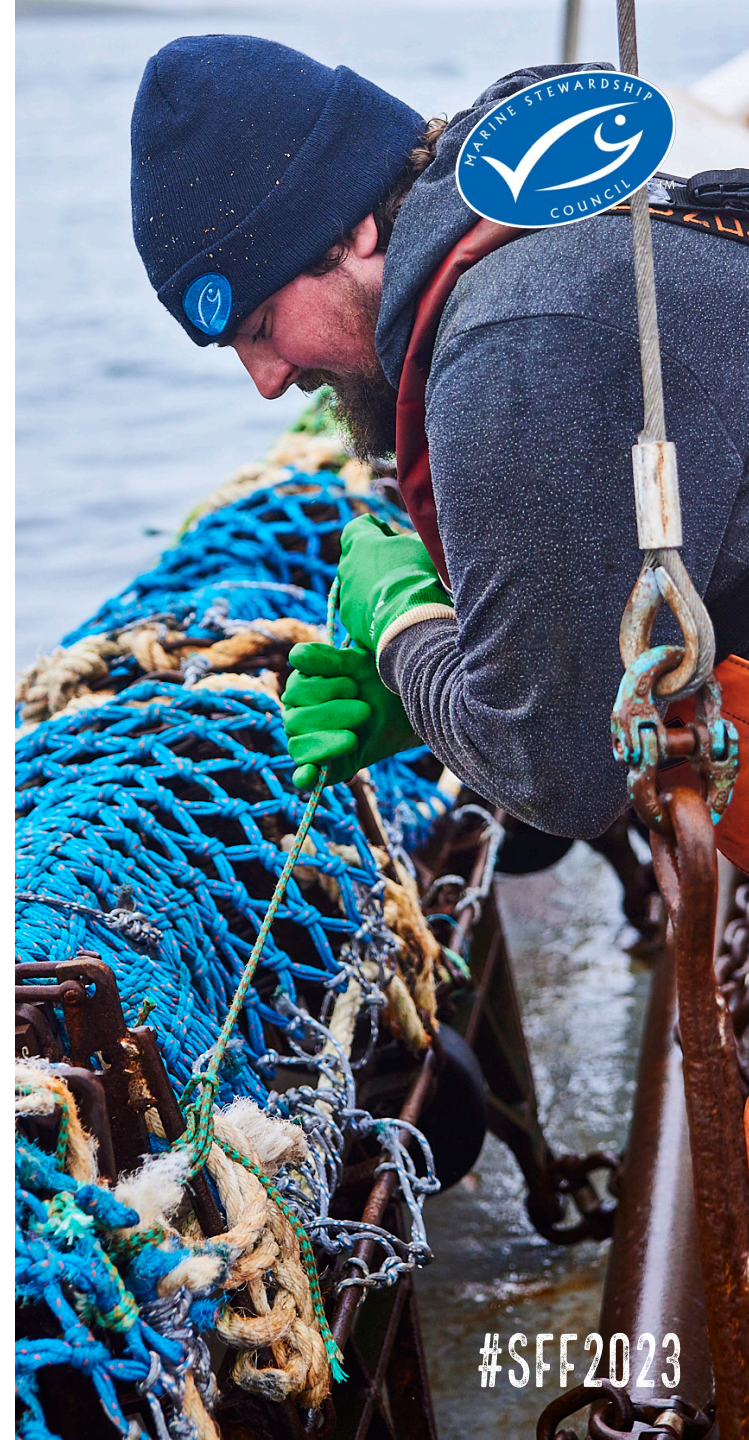
*Figures for 1 April 2022 to 31 March 2023. Fisheries in the MSC programme include those certified, suspended, or in assessment to the MSC Standard. Different species and stock units are identified and counted as different 'fisheries'

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MSC ENGAGED CATCH



*2022 and 2023 data is indicative. Engaged = certified , suspended and in assessment; certified includes suspended fisheries



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CONTINUED GROWTH IN TUNA

2,969,000

tonnes MSC engaged catch*

151

MSC engaged fisheries

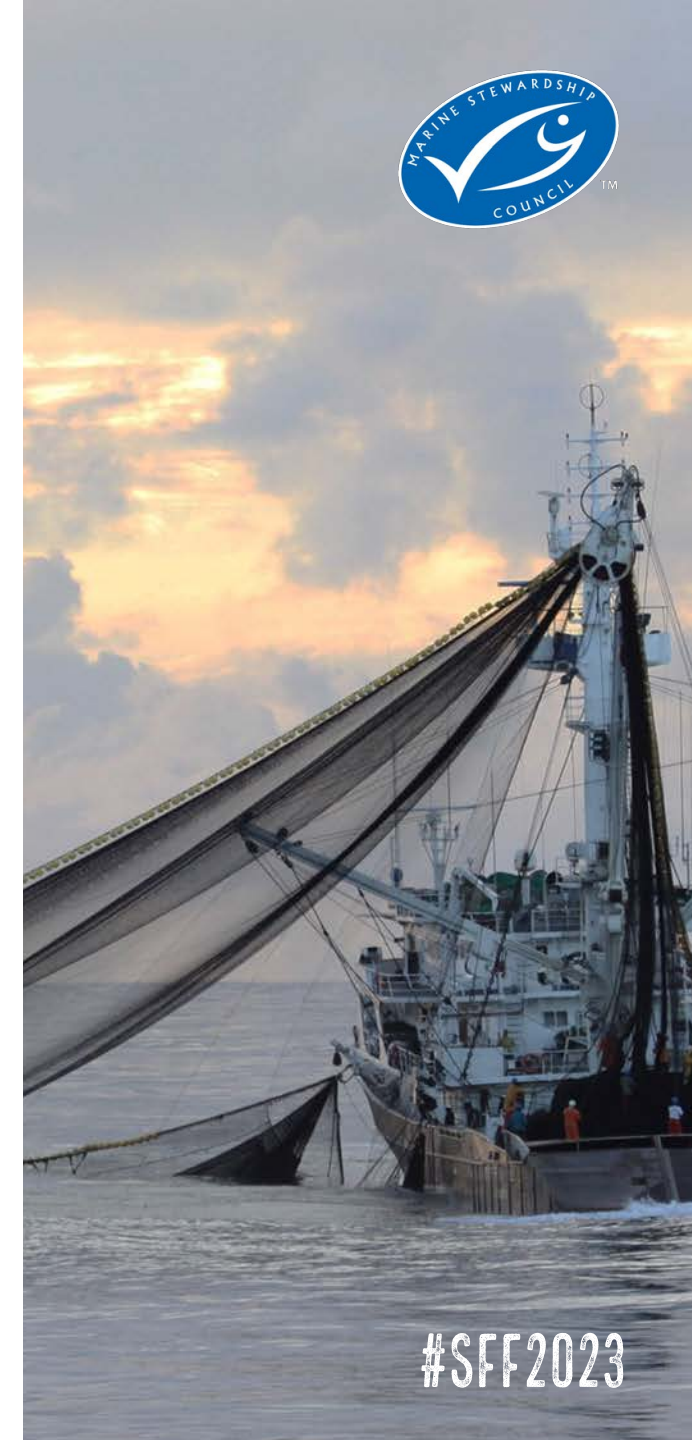
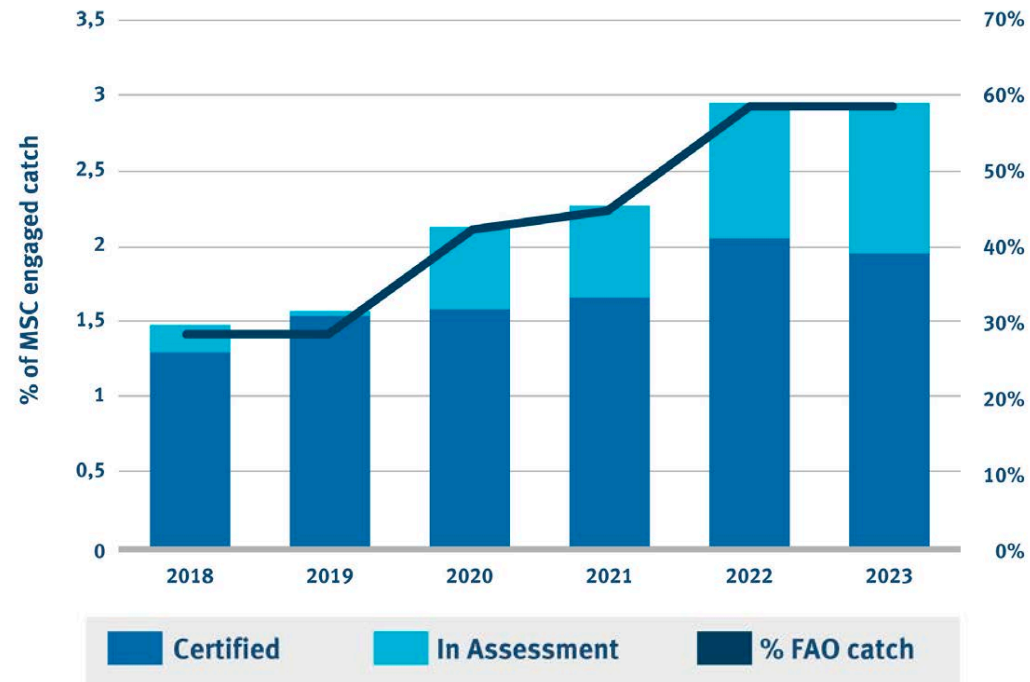
59%

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



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PROGRESS IN INTERNATIONAL MANAGEMENT OF TUNA



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



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INCREASING INTEREST IN LATIN AMERICA



#SFF2023

INCREASING INTEREST IN INDONESIA



#SFF2023

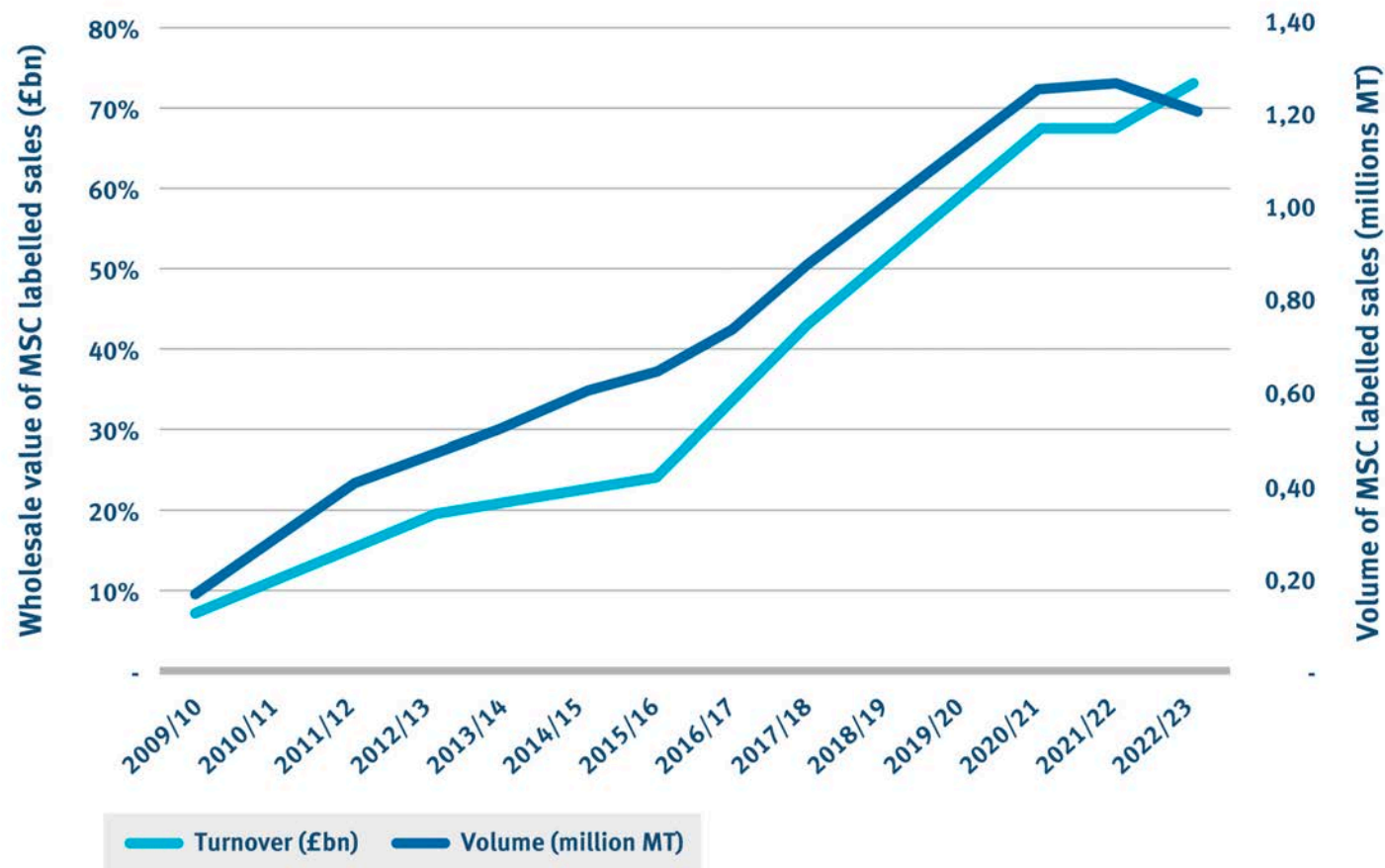


Rope Grown
Scottish Mussels
(Mytilus spp)

£3.99

MARKET TRENDS, NEW COMMITMENTS

MSC LABELLED SALES



20,000 products

with the blue MSC label

70+ nations

where consumers can buy
MSC labelled products

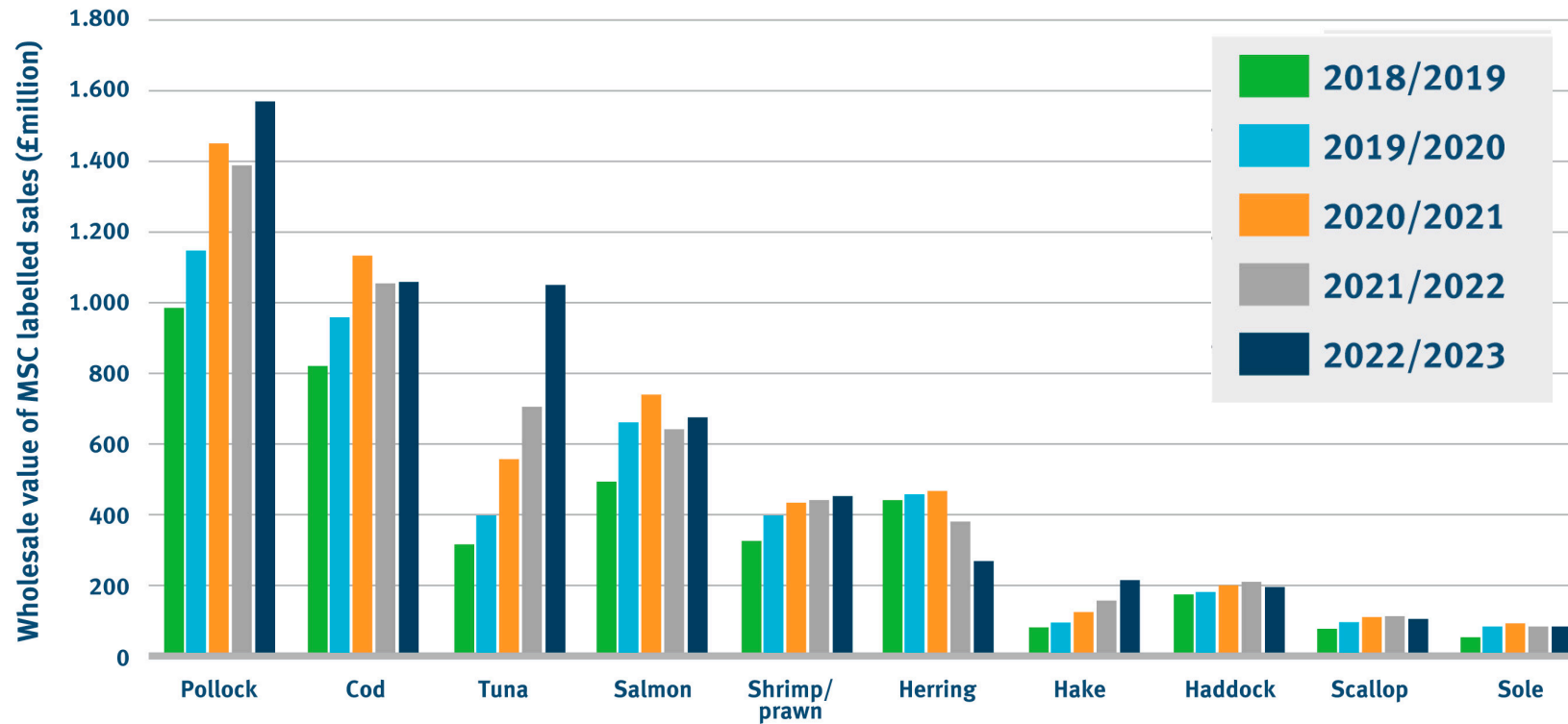
1,217,000 tonnes

2022-2023 volume of sales

£7.3 billion

2022-2023 wholesale value

TOP 10 MSC LABELLED SPECIES

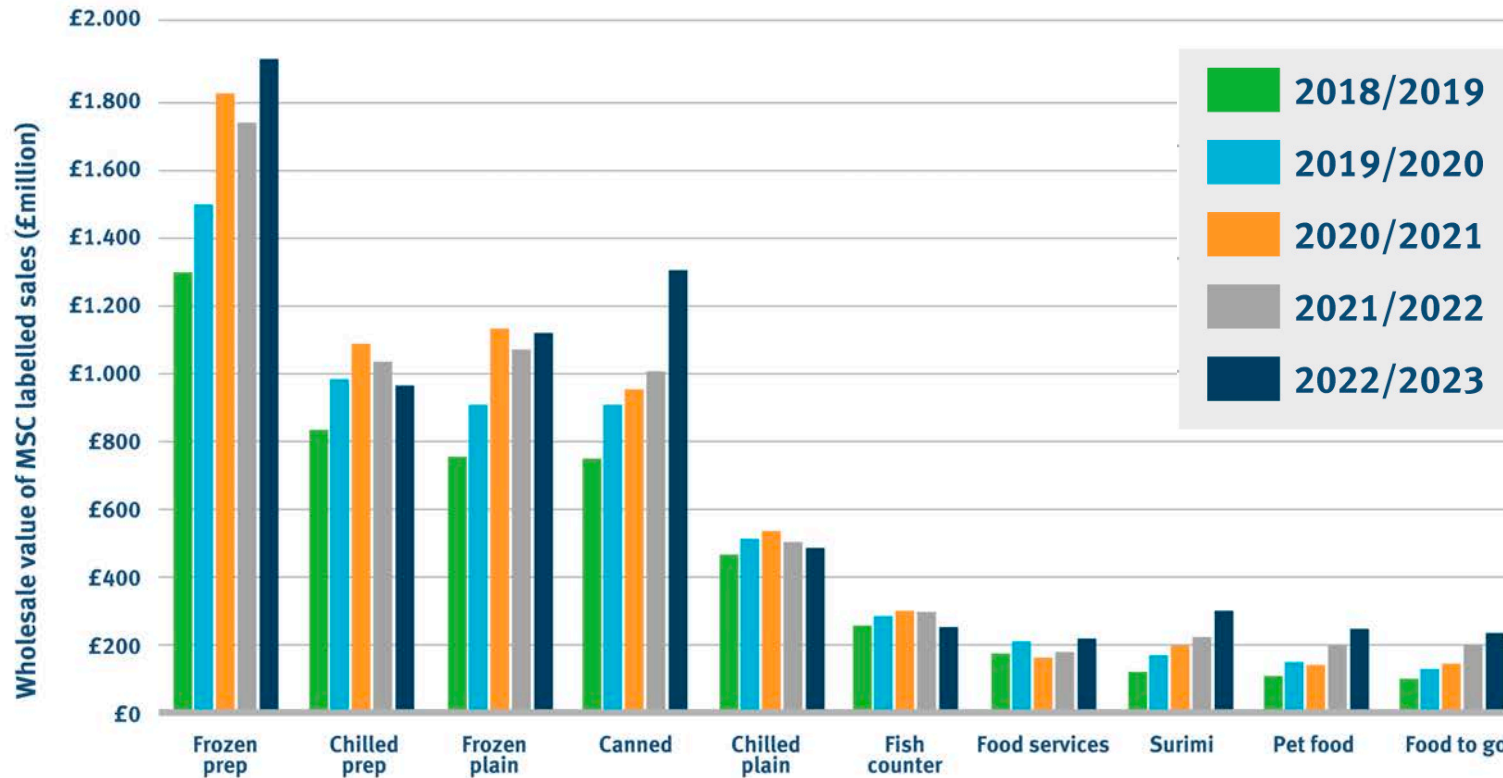


*Actual data reported to 31 March 2022, with forecasts for 2022/2023



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TOP 10 MSC LABELLED PRODUCT CATEGORIES

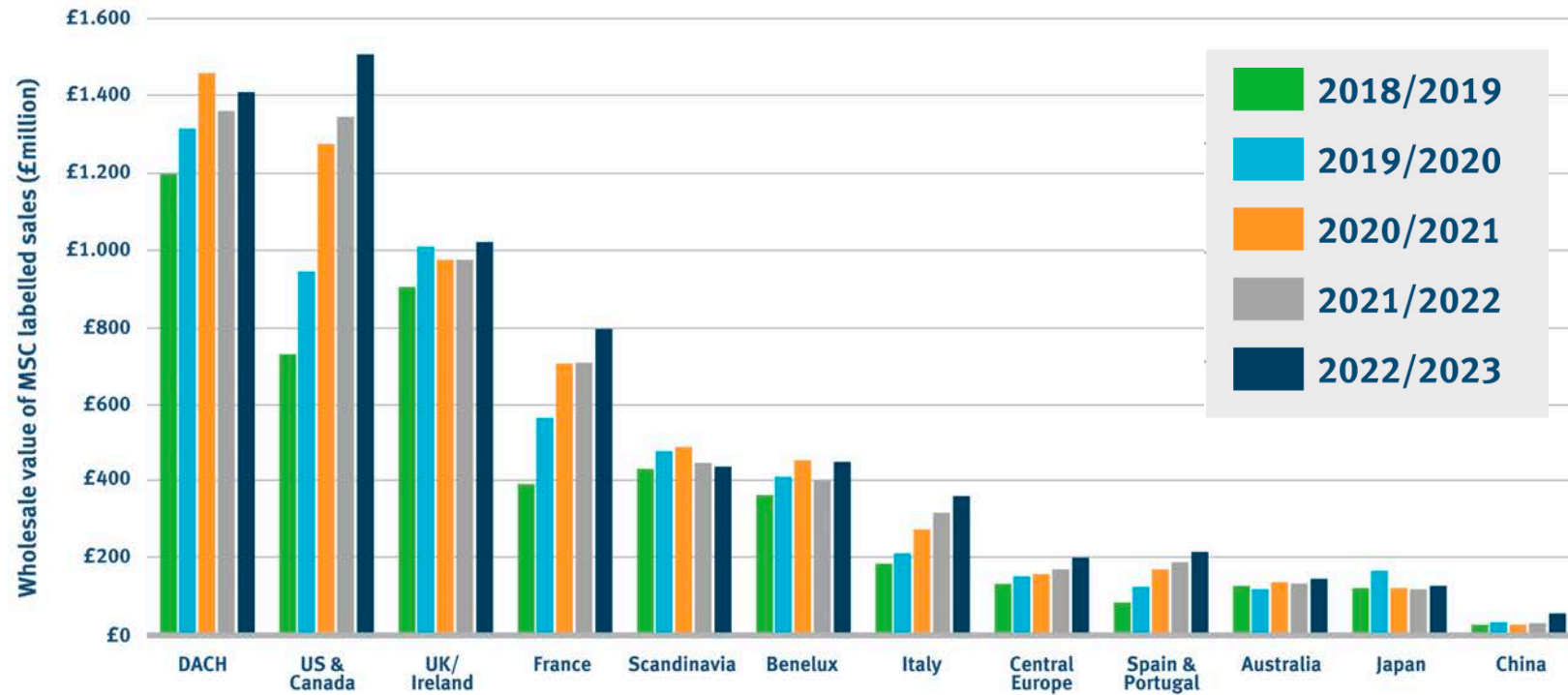


*Actual data reported to 31 March 2022, with forecasts for 2022/2023



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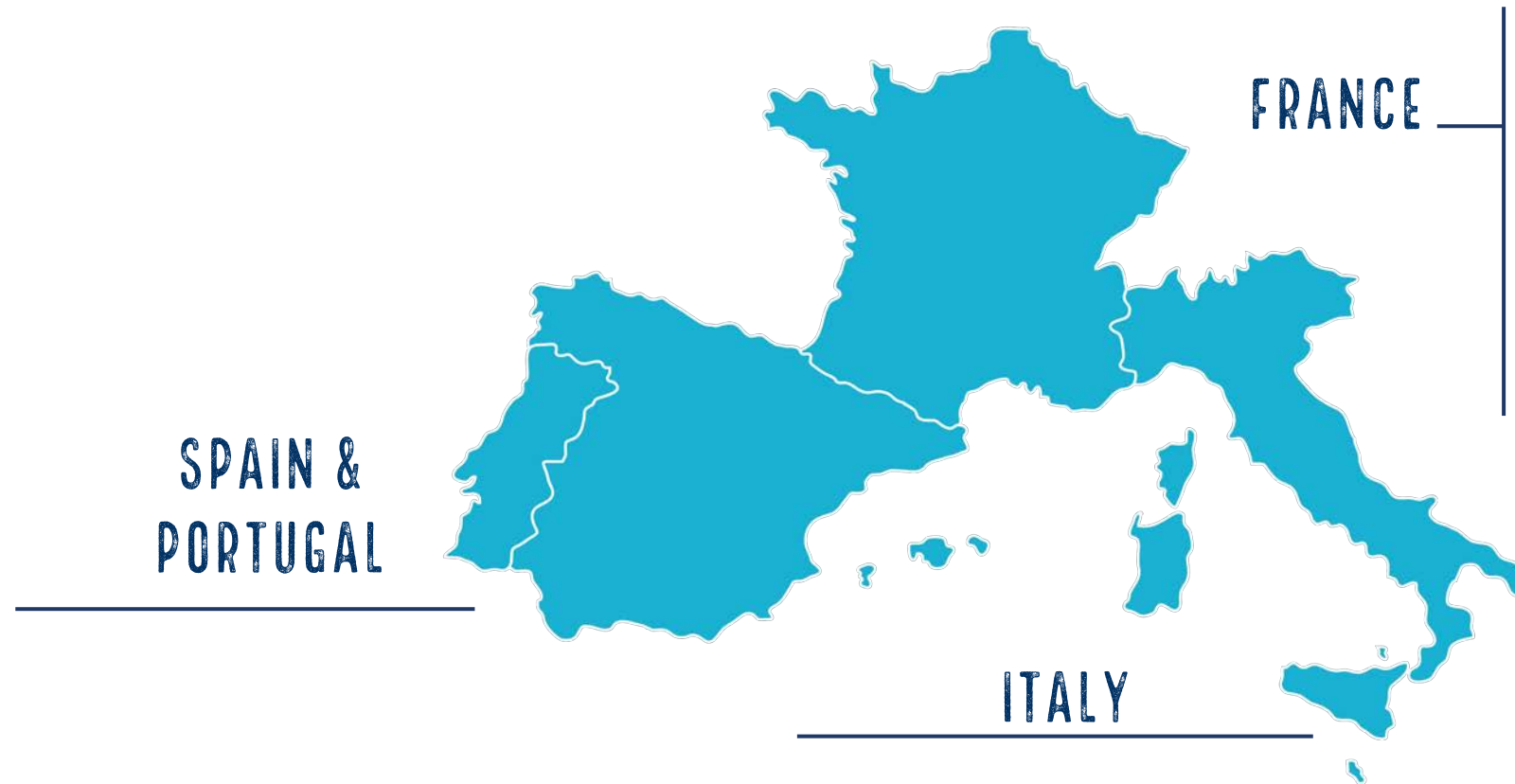
TOP 10 REGIONS FOR MSC LABELLED SALES



*Actual data reported to 31 March 2022, with forecasts for 2022/2023



GROWTH IN SOUTHERN EUROPE



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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.



E.LECLERC

100% of Alaska hake, wild salmon, lumpfish and surimi products for E.LeClerc's own brand 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.



**LABEYRIE
FINE FOODS**

100% of its wild salmon and cod use the MSC label.

SEMAINE DE LA PÊCHE ET DE L'AQUACULTURE RESPONSABLES



COMMITMENTS TO MSC IN ITALY



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.

BOLTON (RIO MARE)



- 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

#SFF2023

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.

RECOGNITION AS A TRUSTED ECOLABEL



La fuerza
de tus decisiones

1 Pesca sostenible certificada



2 Cosméticos y detergentes
naturales ecológicos



3 Ecolabel Unión Europea



4 Comercio Justo



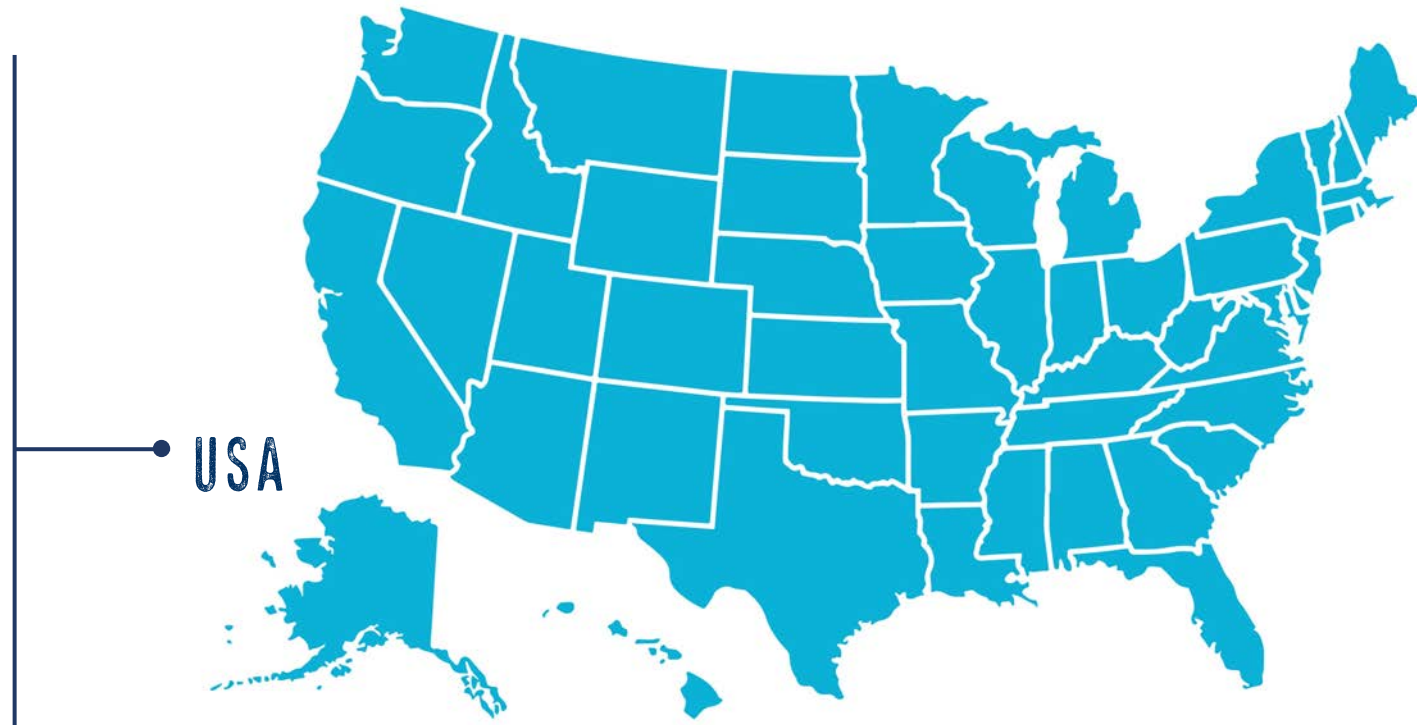
5 Papel y madera sostenible



6 Textiles de confianza sin
sustancias nocivas



GROWTH IN THE USA



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COMMERCIAL PARTNERS IN USA



WALMART

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.



WHOLE FOODS

In 1999, Whole Foods became the first US retailer to partner with the MSC.



MCDONALD'S

In 2013, McDonald's USA became the first US national restaurant chain to use the MSC blue label.



MEIJER

New MSC retailer partner with 240+ stores in six states, launched new in-store and online MSC signage in time for Seafood Month 2022.



NORTH COAST

Top 4 US partner for growth in labeled products in 2022-23, with a refresh and expansion of their "Naked" frozen branded range.



SAFE CATCH

In 2022, Safe Catch committed to rolling out 100% of tuna and salmon products with the MSC blue fish label in 2022-23.

LITTLE LABELS, BIG IMPACTS CAMPAIGN (USA)



NEWS ▾ GROCERY ▾ SUPPLEMENTS ▾ HABA ▾ SUPPLIERS ▾ COLUMNS ▾ BLOG ▾

Home ▸ Natural Health News ▸ Green News ▸ Industry Groups Join Forces to Promote Sustainable, Resilient Food Systems

Natural Health News Green News Grocery News Grocery News

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

[f](#) [t](#) [in](#) [p](#) [e](#) [b](#)

A photograph of a man with a beard and sunglasses, wearing a grey shirt, holding a white grocery bag. The bag features the "Little Labels, Big Impact" logo. To his right are three large logos: Fairtrade, MSC (Certified Sustainable Seafood), and Non-GMO Project Verified. The background is a light-colored wall.

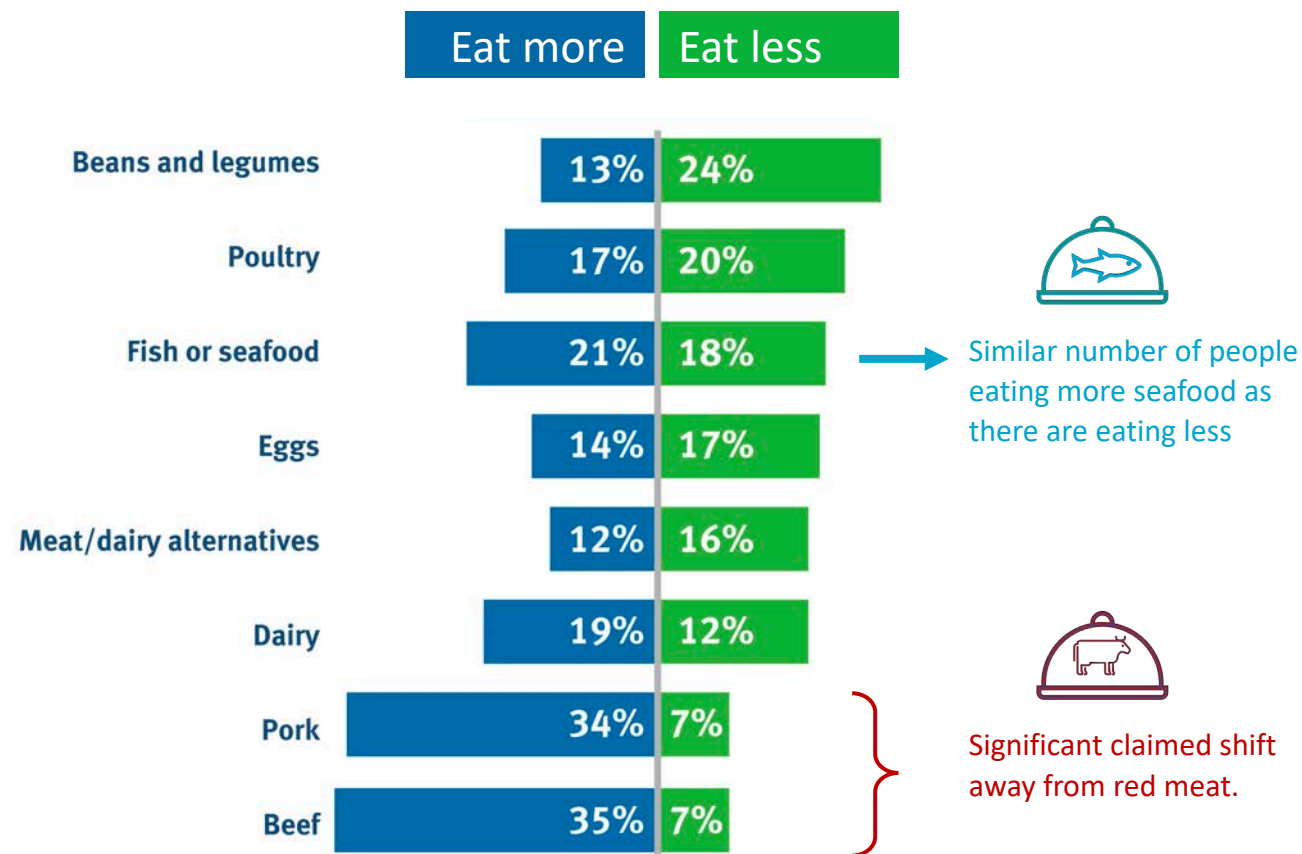
Washington, D.C.—Fairtrade America, the Marine Stewardship Council (MSC), and the Non-GMO Project have joined forces to launch “Little Labels, Big Impact.” This campaign is focused on building

A woman with long dark hair, wearing a grey long-sleeved shirt, is standing in a supermarket aisle. She is looking at her smartphone while holding a blue shopping basket. The aisle is filled with large glass-fronted freezers containing various frozen food items, including bags of frozen vegetables and packages of meat. The scene is brightly lit, and the woman appears to be smiling.

RESPONDING TO THE CHANGING CONSUMER LANDSCAPE

CHANGING CONSUMER ATTITUDES

Claimed changes in food consumption compared to two years ago



Source: Globescan MSC Seafood Perceptions Survey 2022 conducted with 25,869 consumers across 23 markets globally



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TOP MOTIVATORS IN PURCHASING SEAFOOD

- 1 Fresh
- 2 Good for my health / family ↑
- 3 Safe to eat
- 4 Taste
- 5 Price ↑
- 6 Sustainably sourced
- 7 Type of fish always eaten ↑
- 8 Is not GMO
- 9 Knowing where the product comes from
- 10 Easy to cook



= rise compared with 2020



Source: Globescan MSC Seafood Perceptions Survey 2022 conducted with 25,869 consumers across 23 markets globally

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IT ALL STARTS HERE...

Help protect our Ocean







THE ROLE OF WILD SEAFOOD IN THE BLUE TRANSFORMATION



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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

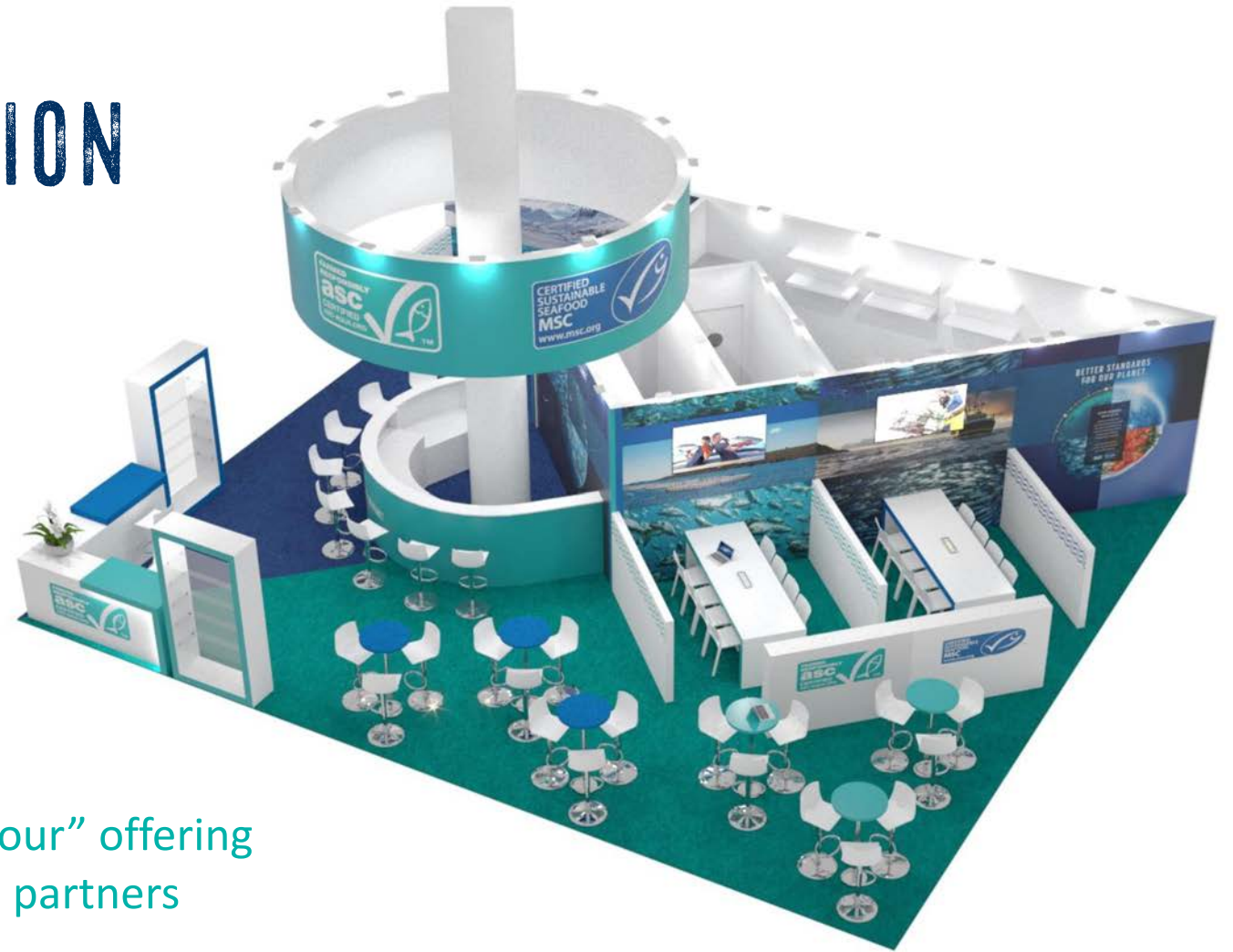
The background of the image is a composite. The left half shows a view of the Earth from space, with blue oceans and white clouds. The right half shows a top-down view of a light blue ceramic plate containing a piece of cooked salmon, green leafy vegetables, and small orange garnishes. A hand with pink nail polish holds a silver fork on the right side of the plate. A semi-transparent dark blue rectangle is centered over the image, containing the main text.

THANK YOU FOR JOINING SEAFOOD
FUTURES FORUM 2023

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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

#SFF2023



THANKS FOR COMING



Sign up to:

- Species Sourcing Events
- MSC's newsletters

Download:

- MSC Annual Report
- Guides to MSC certification

msc.org/keepintouch

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FIND OUT MORE
ABOUT BLUE FOOD



msc.org/bluefood



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