



SEAFOOD FUTURES FORUM

Fit for the future?
How the MSC can stay the course.



**Visit us in Hall 7
at stand 7-1553**



**Your moderator
for today**



Dr Stephen Hall,
Principal, Avalerion Capital

Our Agenda

- 09:00** Welcome and housekeeping
- 09:05** Opening remarks, Rupert Howes
- 09:10** Key trends, learning and opportunities, Nicolas Guichoux
- 09:25** Keynote address from Ally Dingwall, Sainsbury's
- 09:40** Panel discussion (50 minutes)

Welcome & introduction



Rupert Howes
CEO
Marine Stewardship Council



NORGES FISKARLAG

CONSERVATION
INTERNATIONAL



Department of
Primary Industries and
Regional Development



Yayasan
Masyarakat dan Perikanan
Indonesia



**MSC Stakeholder Council
represents diverse viewpoints**

OUR OCEAN
MALTA, 5-6 OCTOBER 2017

 Proudly hosted by
the European Union



**MSC is actively involved in
global debate and progress**

A resource under pressure



A resource under pressure



A resource under pressure



A resource under pressure



A resource under pressure



A resource under pressure



The state of our oceans





SUSTAINABLE DEVELOPMENT GOALS



The MSC program contributes to 5 of the 17 UN sustainable Development goals



**SUSTAINABLE
DEVELOPMENT** GOALS

**The MSC provides a
practical solution:**



- ✓ **No overfishing**
- ✓ **No IUU**
- ✓ **No destructive fishing practices**
- ✓ **Good fishery management**





Fishery and market insights from the MSC



Nicolas Guichoux
Global Commercial Director
MSC

The MSC, a tool to deliver Global sustainability goals



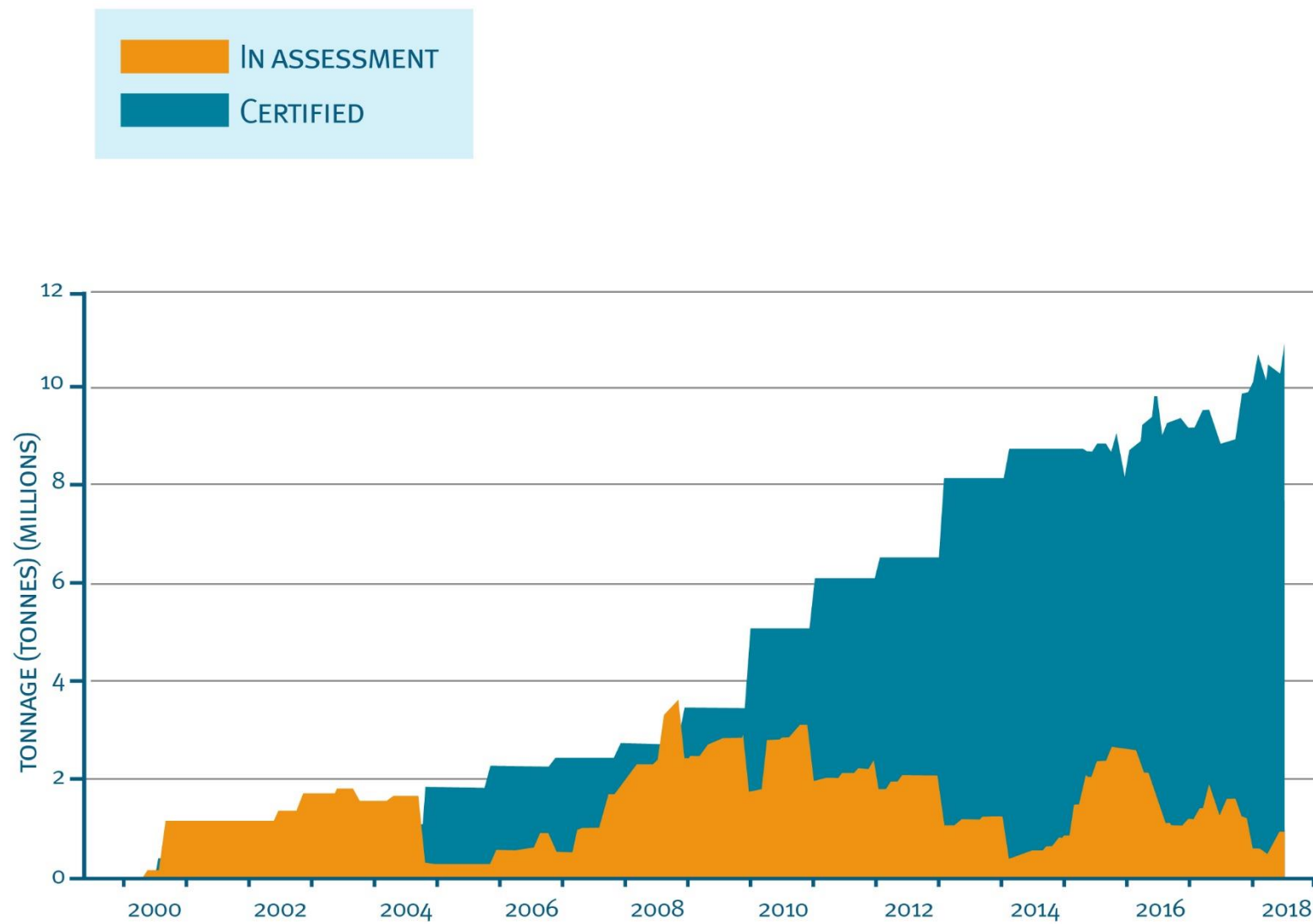
Conserve and sustainably use the oceans, seas and marine resources for sustainable development.

Fisheries in the MSC program 2017-18

30 NEW FISHERIES CERTIFIED

41 FISHERIES RECERTIFIED

27 FISHERIES SUSPENDED /
WITHDREW



**Brown Shrimp:
an exemplary
collaboration
between NGOs
and industry**



A close-up photograph of several snow crabs in a metal basket. The crabs are a mix of brown and orange colors, with their legs and claws visible. The background is a solid teal color.

The case of St Lawrence snow crab suspension

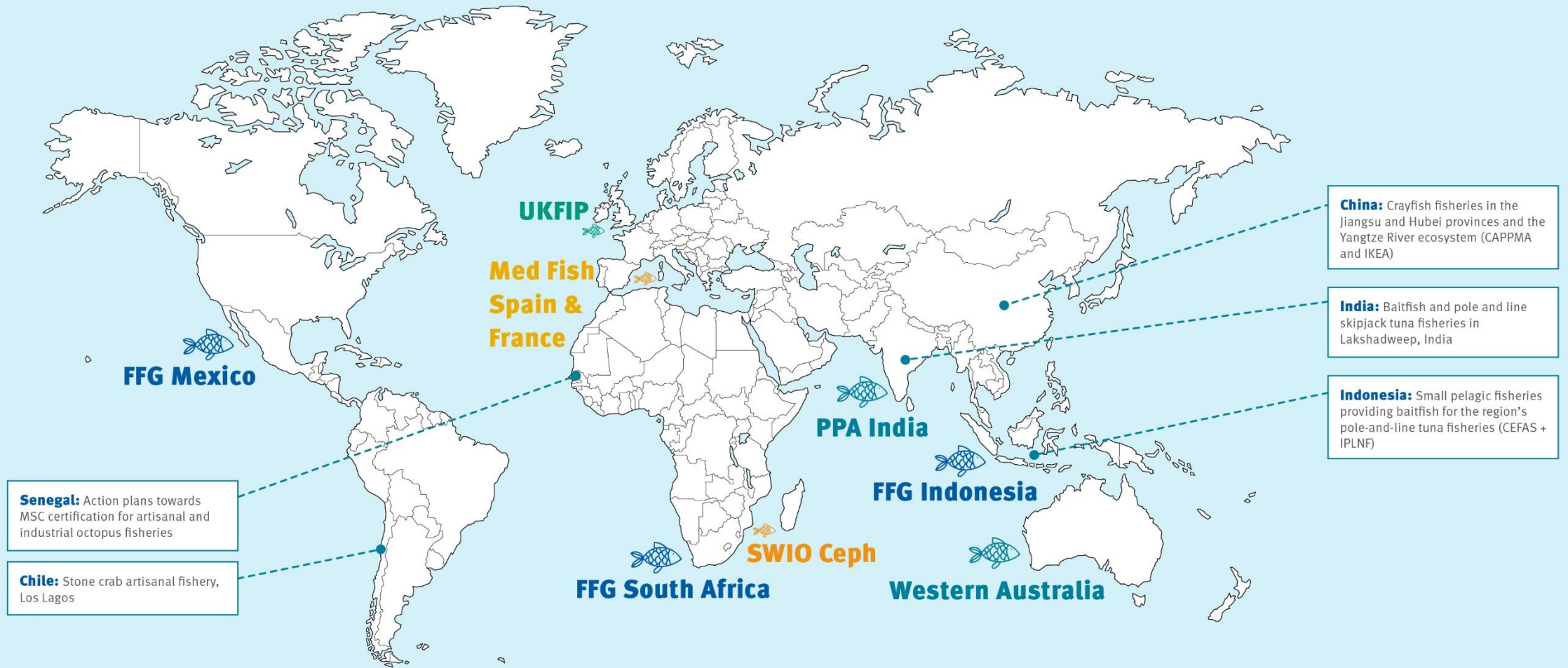
“

We have been working with Fisheries and Oceans Canada (DFO) and all the fishers' associations in the Southern Gulf of St. Lawrence to address the tragic events of summer 2017. There is a collective will to make sure this is never repeated, and we are strongly advocating for effective solutions.

”

Peter Norsworthy, Seafood Producers Association of Nova Scotia

MSC support of sustainable development in fisheries



MSC scholarships



Lily Zhao awarded scholarship for a project mapping small scale octopus fisheries trade in East Africa

The market

29,000
PRODUCTS IN 108
COUNTRIES

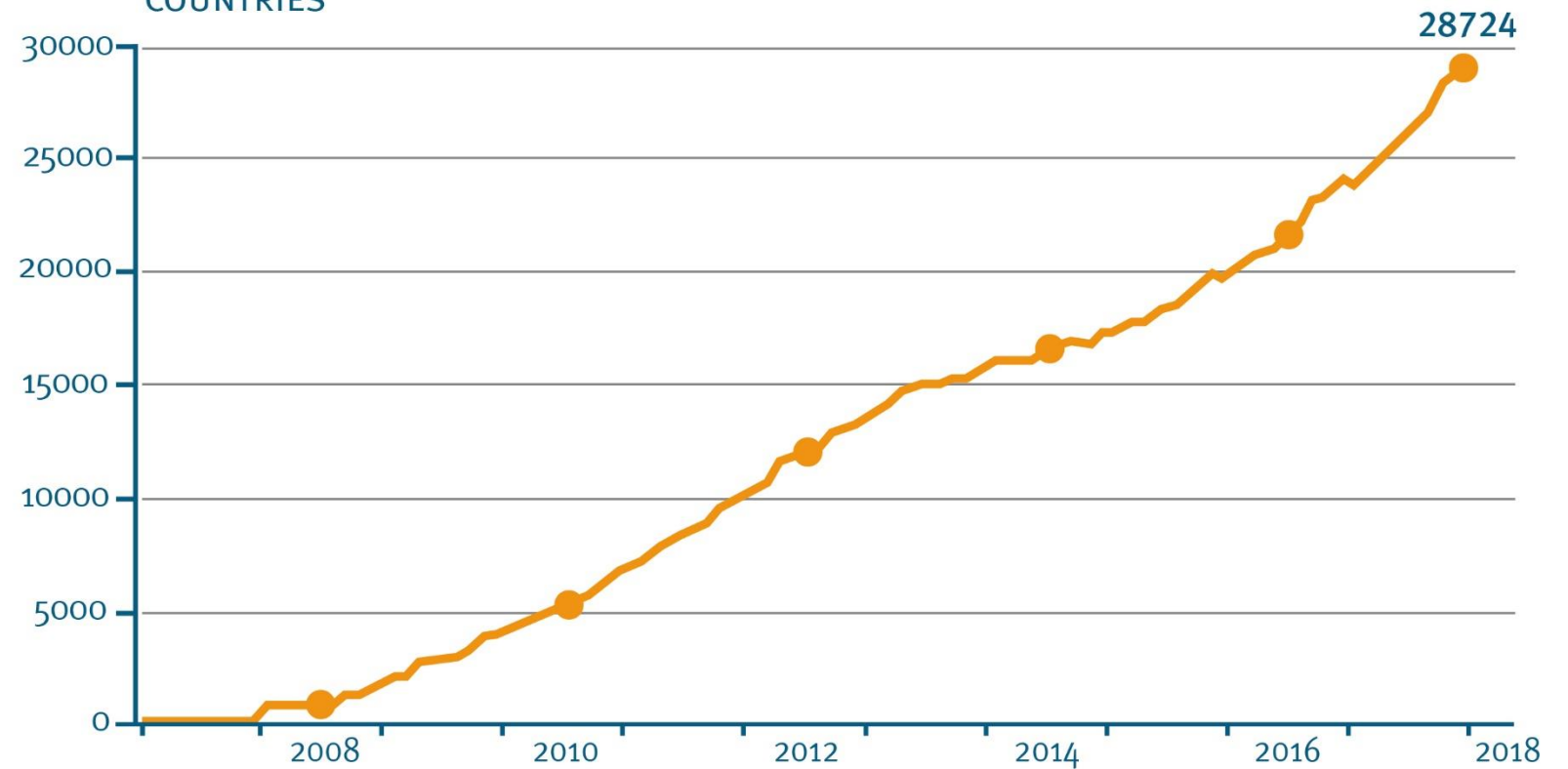


now carry the MSC label

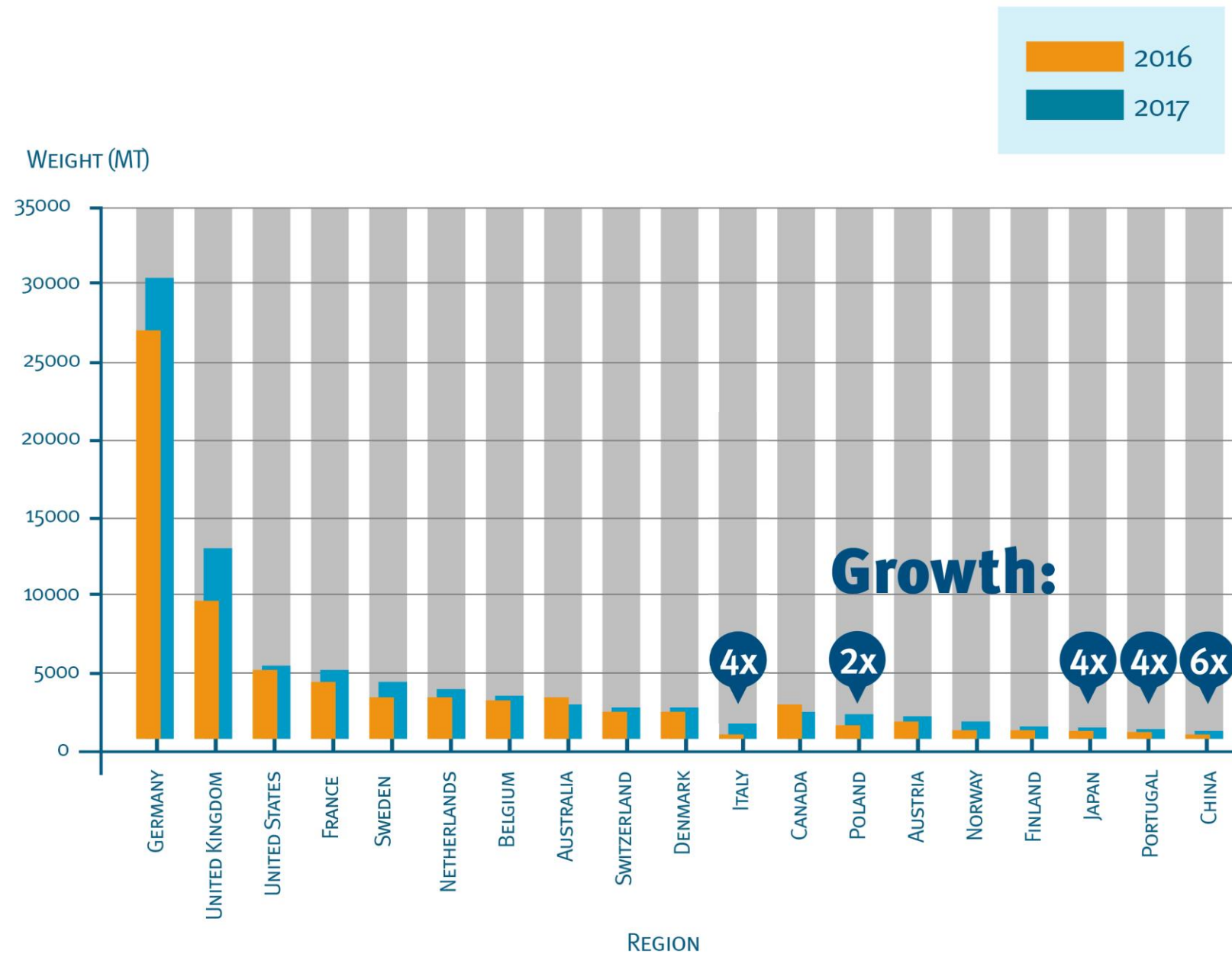
860,000 TONNES

20% GROWTH

GLOBAL SUM OF PRODUCTS
AVAILABLE IN INDIVIDUAL
COUNTRIES



Volume of consumer facing MSC labelled products per country



Wet fish counters



Japan



TOKYO ● 2020



MSC in European public procurement

MSC certifications recognised in government guidance:



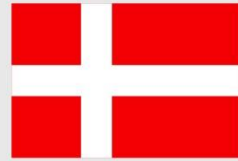
The Norwegian Directorate of Health



Ministry of Agriculture and forestry



A new legislation allowing ecolabels to be part of the public procurement



Public agriculture and fisheries directorate and DFPO Fisheries Association of Denmark



City of Paris Sustainable Food Plan



The German Council for Sustainable Development recommend MSC in their Sustainable Shopping Basket



The Italian Government public procurement policy GPP for collective restaurants



The Dutch Ministry of Economic Affairs, Fisheries Directorate recognised MSC in public procurement policies as equivalent to organic

2020 Leaders for a Living Ocean

OUR OCEAN

MALTA, 5-6 OCTOBER 2017



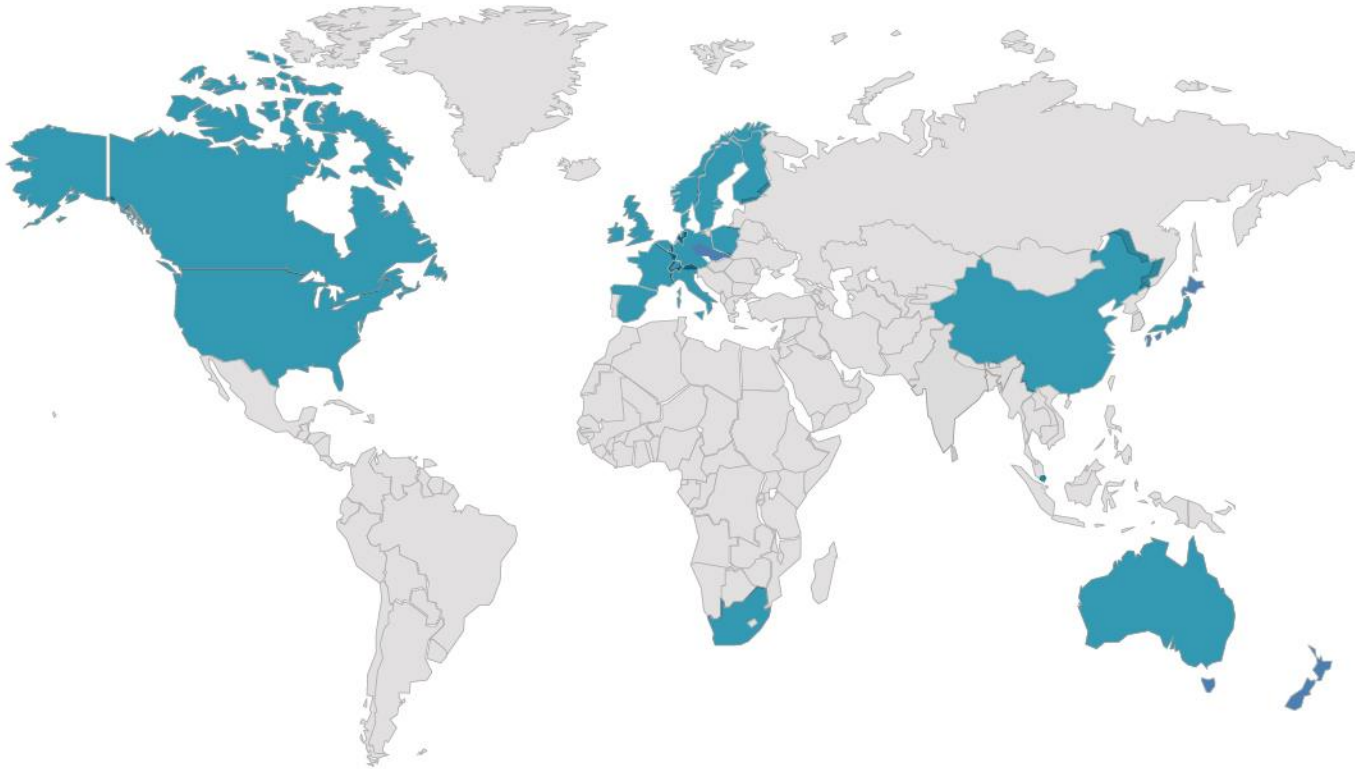
The role of consumers

SEMAINE DE LA PÊCHE RESPONSABLE

LE BON CHOIX
MAINTENANT
POUR DU
POISSON
ENCORE LONGTEMPS



Introduction to our Global Consumer Perceptions Study 2018

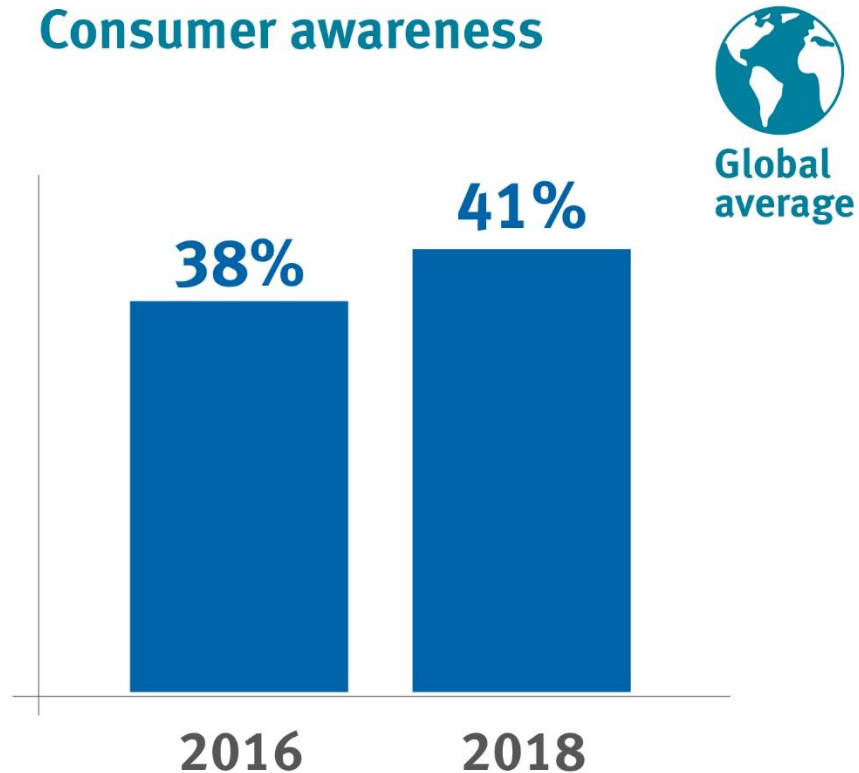


The largest survey of seafood consumers with global coverage:

- **25,000** CONSUMERS
- ACROSS **22** MARKETS

Global Consumer Perceptions Study 2018

Consumer awareness



- Ocean pollution is high in the public agenda with overfishing as the second most important concern
- In seafood purchase motivators price has risen in some markets
- Consumer awareness of the MSC label has increased this year
- Understanding of the label is also up
- High trust levels of 69% are maintained

Key MSC development projects





SEAFOOD FUTURES FORUM

Fit for the future?
How the MSC can stay the course.

Sainsbury's

Keynote speaker



Ally Dingwall
Aquaculture and Fisheries Manager,
Sainsbury's

Sainsbury's Group at a glance



605

supermarkets



1,700+

ATMs



60,000+

products



1

London Habitat Design Studio biggest clothing retailer in UK by value



10th

807

convenience stores

230+

travel money bureaux

30,000

employees

4,500+

unique products in our collection

400

stores selling TU clothing

27m

customer transactions each week

1,500

colleagues across UK

800+

stores

200+

suppliers around the world

2,500

quality items of clothing

250,000

online orders each week

8+

financial products

1 billion

online visitors

10

UK stores and counting

1

successful year of TU online

Sainsbury's
live well for less

Our Company Values

A great place
to work

Living healthier
lives

Sourcing with
integrity

Respect for our
environment

Making a positive
difference to our
community

Our Sustainability Plan - Values



**Living healthier
lives**



**Offering customers
nutritious and healthy
food and encouraging
active lifestyles**



**Sourcing with
integrity**



**Building resilient
supply chains by
sourcing products
ethically and
sustainably**



**Respect for our
environment**



**Reducing emissions,
water use and waste
across our value chain**



**Making a positive
difference to our
community**



**Generating positive
impact in the
communities we serve
and source from,
locally and globally**



**A great
place to work**



**Being an inclusive
employer where
colleagues love to
work**

Delivery of Our Sustainability Plan is governed by five Value Management Groups (VMGs), each overseen by a Value Chair, working with a Value Secretariat.

Our Sustainability Plan



20x
20

Original 20x20
Sustainability
Plan set out in 2011

Our five values are underpinned by our
20 commitments and 100 delivery goals



Our Sustainability
Plan refreshed and
rebranded in 2015



SUSTAINABLE DEVELOPMENT GOALS



Living
healthier lives

Great place
to work

Respect for
our environment

Sourcing
with integrity

Making a positive
difference to our
community

Our Sustainability Plan



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Plan refreshed and
rebranded in 2015



Work on our post-
2020 sustainability
strategy

Our Sustainability Plan - Fish



**All the fish we
sell will be
independently
certified as
sustainable**

**Consistent
with SDG
Target 14.4**

End overfishing, IUU and
destructive fishing practices

Implement science based
management plans

Restore stocks to levels that
can deliver maximum
sustainable yields

Why MSC ?

Credibility

Independence

Governance framework

Transparency

Global applicability

Measured impacts

Simplicity in messaging

Independently audited
chain of custody

Platform for improvement

PRINCIPLE 1
Sustainable
fish
stocks

PRINCIPLE 2
Minimising
environmental
impact

PRINCIPLE 3
Effective
Management



Sainsbury's
live well for less

Global to local



01



02



4 steps to a credible FIP

Supporting fisheries as they move towards MSC certification

Fisheries that are keen to become MSC certified but do not yet meet the MSC Fisheries Standard may choose to make the necessary improvements to their operations through a Fishery Improvement Project (FIP). A credible FIP involves four key stages, each with associated tools and support mechanisms.



Stakeholder engagement

Stakeholder engagement underpins every stage of the FIP process. Different stakeholder groups need to work together to deliver improvements.



Pre-determined timeframe

There should be a pre-determined limit to the amount of time spent as a FIP. This should generally be no longer than five years.



Stakeholder training

The Working to MSC certification guide and Capacity building training program equip stakeholders with knowledge to implement successful FIPs.

03



04



Progress to date

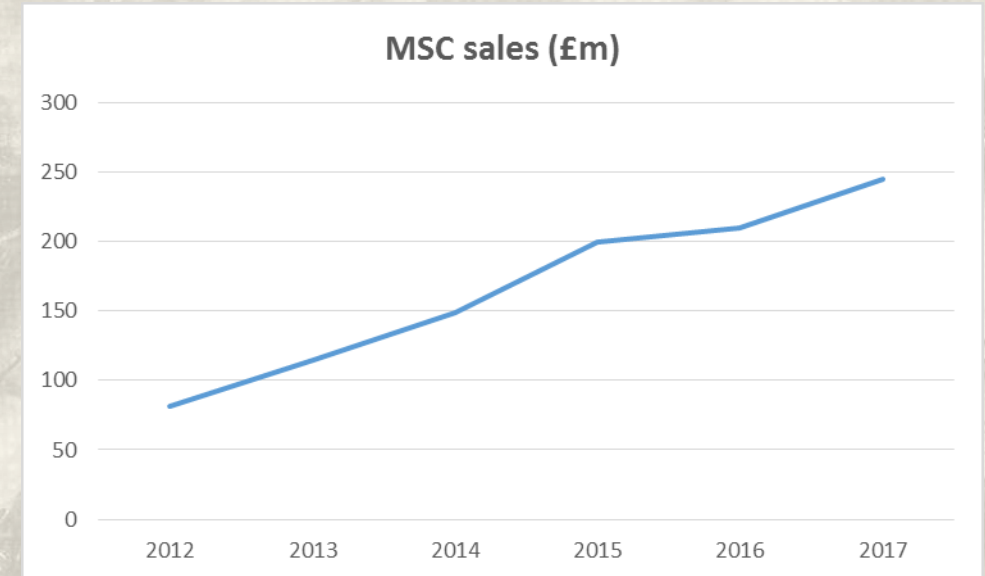
>£240m

sales of MSC
certified products
in FY 2017/18



86%

of wild caught
sales MSC
certified



**The Marine Stewardship Council names Sainsbury's
'The best sustainable seafood supermarket in the world'**



Building a Distinctive Sainsbury's

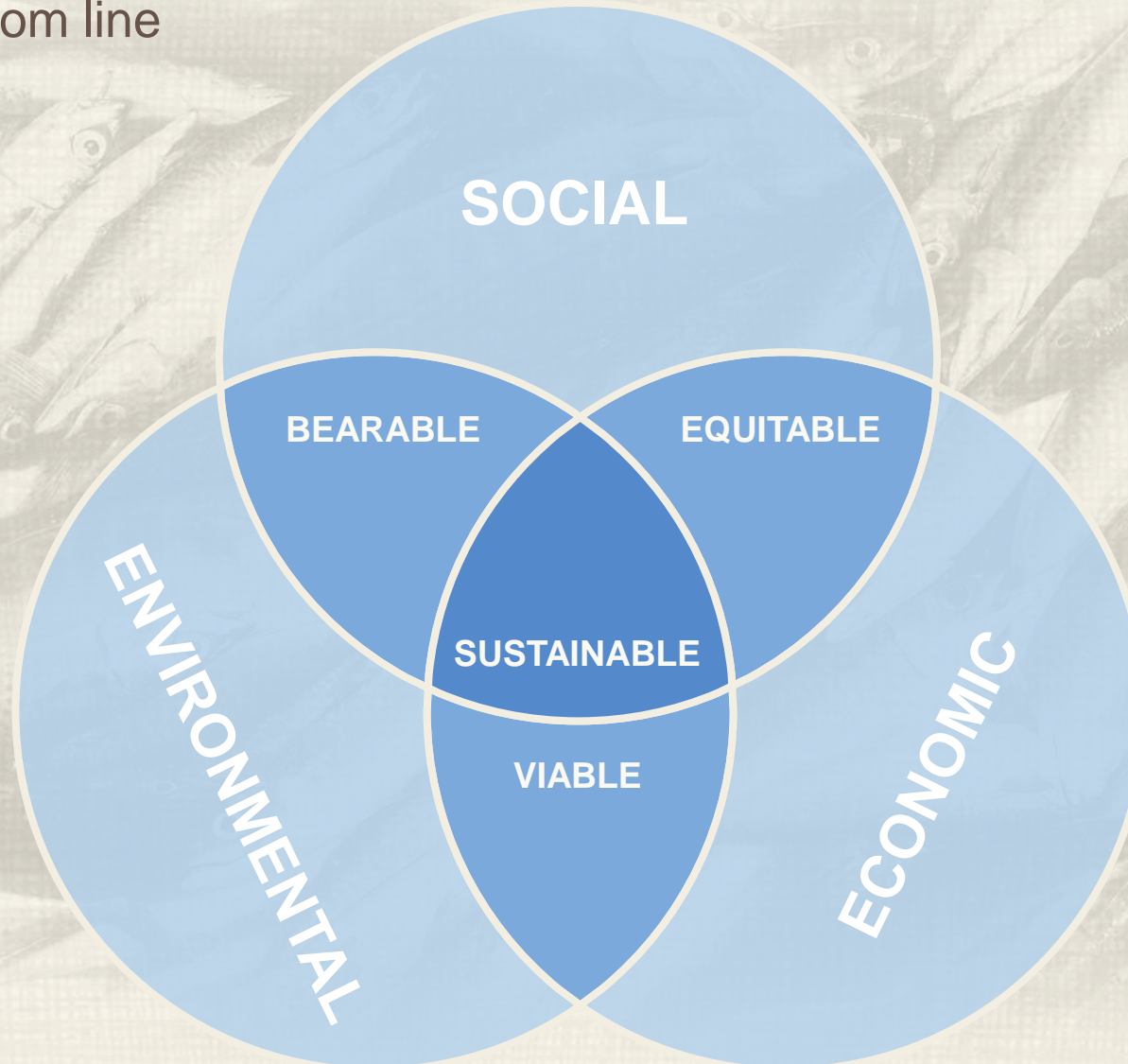
Sainsbury's
live well for less

Developing a sustainable business



Developing a sustainable business

Delivering the triple bottom line





Demonstrating responsibility on a global scale

Organisational engagement

Dialogue

Pre-competitive collaboration

Fishery improvements (FIPs)

Innovation

Standards adoption and development

Underpinning stakeholder recognition



(Fit for) The Future

Conserve and sustainably use the oceans, seas and marine resources for sustainable development



The world's oceans teeming with life, and seafood supplies safeguarded for this and future generations.



Demonstrably delivering the Vision

Delivering consistent assurance

Assessing and reinforcing governance

Maintaining a robust framework for all stakeholders

Adapting to emerging issues and new evidence

Engaging with and adopting new technologies

Cost effectiveness

Finding sustainable balance





Thank you

Panel Discussion



Moderator:
Dr Stephen Hall



Amanda Nickson,
Pew Charitable Trust



Tor Bjørklund Larsen,
Norges Fiskarlag



Annelie Selander,
Nomad Foods Europe



Ally Dingwall,
Sainsbury's

More events

Today 11:00 - 13:00 in the Cinedoc Room:

SEAFISH

CHALLENGING PRECONCEPTIONS OF
THE IMPACT OF BOTTOM TRAWLING &
IDENTIFYING BEST PRACTICE

Prof Ray Holborn (University of Washington)

Dr Jennifer Shepperson (Bangor University)

Dr Alex Caveen (Seafish)

&

14:00 - 15:00 Q&A session on the Seafish
stand (8-4543 in Hall 8)

Visit us in Hall 7
at stand 7-1553



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



Talk more to MSC staff