



Celebrating 25 years of certified sustainable seafood

**The Marine Stewardship Council
Annual Report 2021-22**



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With global demand for fish and aquatic foods expected to double by 2050, we must do much more to safeguard the ocean’s health. Fishing sustainably is essential.

Business commitments are driving change on an international scale. By investing in sustainable fishing and buying only sustainable seafood, businesses create a chain reaction which will be key to helping safeguard the ocean.

Peter Thomson, United Nations Secretary-General’s Special Envoy for the Ocean

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A message from our CEO



The Marine Stewardship Council (MSC) is a quarter of a century old. It really has been an extraordinary journey: without doubt what was once the bold and ambitious idea of our founders, WWF and Unilever in 1997, has become a proven concept. The MSC's evidence-based third-party certification and labelling program has provided a mechanism to enable well-managed and sustainable fisheries to demonstrate their good governance of our ocean resources to the market and consumers, and critically, to incentivise improvements to the way our oceans are fished. Today more than 500 fisheries around the world, landing 12 million tonnes of seafood, have achieved certification in a market for certified and labelled seafood sales of US\$12.28 billion.

None of this would have been possible without the long-term support and engagement of our partners in the fishing industry, seafood market and civil society who share our vision of healthy and productive oceans. The MSC provides the tool and framework, but it is their leadership that delivers the change.

We are a market-based program and report market-based metrics such as the number of certified fisheries and size of the market, but it is important to remember these measures are just proxies for engagement and impact. The MSC is, first and foremost, concerned with driving real and lasting change and in this report you will read about some of the documented improvements – over 2,000 of them – that have been delivered by certified fisheries on their journey to sustainability. Jeff Skoll, founder of eBay and an early supporter of the MSC, recognised this and described the organisation as a disruptor, challenging the status quo with determination to deliver impact at scale.

Despite the tremendous progress being made around the world, our ocean is facing unprecedented pressure. Climate change is

an existential threat which is already having profound impacts on ocean health. Several major fisheries have lost their MSC certification because of climate-related changes and a failure of nation states to follow scientific advice when setting quotas. Growing nationalism also threatens our collective ability to deliver sustainable fishing. Consequently, it is vital that we all redouble our efforts, in the diminishing time we have available, to work together collectively to ensure our oceans are being fished sustainably, globally.

It is for this reason that the MSC has set itself the ambitious target to work with our partners to engage over a third of wild capture landings in the program by 2030, in line with the United Nations Agenda 2030 and as part of our contribution to the delivery of the specific targets within Sustainable Development Goal (SDG) 14, Life Below Water. We have launched a new Fisheries Standard after the most comprehensive review in our history to ensure our standard for environmentally responsible and sustainable fishing reflects new and widely adopted science and best practice fisheries management. We will also launch a new strategic plan in early 2023 that will include the MSC recommitting to innovating and engaging more strategically with fisheries in the pre-certification space through the scaling of our Ocean Stewardship Fund, In-Transition to MSC (ITM) program and expansion of our Pathway Projects that you will read about in this report.

At the MSC, we are humbled by what our partners have achieved over the last 25 years – and determined to play our part in tackling the challenges ahead.

Rupert Howes, Chief Executive, Marine Stewardship Council

A message from our chair



Over the last 25 years, the MSC has become a globally recognised organisation and a respected voice on ocean issues. With this global recognition comes increased responsibility. Given the scale of the challenge facing our ocean, we can – we must – raise our voice even more powerfully to advocate for sustainable fishing globally.

One of the challenges we are grappling with is how we can engage and work with more fisheries – particularly those that may still be some way from achieving certification, to help them on their pathway to sustainability. It requires us to work in different ways, including in some challenging institutional environments and with fisheries that may face more challenges to entering certification because of limited data, less advanced management, funding and a greater need for support and training.

There will always be a tension between those who want the MSC to be accessible to more fisheries and those who want the Standard to set a higher bar. This is a healthy dynamic, and I believe we have managed to strike a good balance in our new Fisheries Standard. We have updated our requirements in key areas, to ensure that MSC certified fisheries continue to be recognised as leaders in sustainability. We have also

sought to streamline aspects of the Standard while making improvements to improve accessibility.

That we are able to maintain this balance owes much to our multi-stakeholder governance structure. We owe a debt of thanks to our Stakeholder Advisory Council and our Technical Advisory Board – busy people in important positions who, on a purely voluntary basis, put in tremendous efforts to ensure the MSC represents a wide diversity of views while also being underpinned with scientific rigour. I am also grateful to the MSC leadership team for the energy, intellect and creativity they continually show.

Of course, there is always room for improvement, which is why we recently carried out a governance review. This should enable the MSC Board to make more effective strategic decisions as we seek to step up to our global responsibilities and set our course for the future.

Werner Kiene, Chair, Marine Stewardship Council Board of Trustees

Overcoming overfishing

Resilience and growth in sustainable seafood

The unprecedented disruption caused by the Covid-19 pandemic as well as surging demand as countries exited lockdowns have put great pressure on the global seafood industry. In February 2022, the uncertain outlook was exacerbated further when Russia invaded Ukraine – with some countries moving to impose or threaten sanctions and higher tariffs on Russian imports, including seafood.

Against this backdrop, MSC certified fisheries have shown great resilience, with the certified seafood catch increasing slightly in 2021-22 to 12 million tonnes or 15% of all wild marine catch. This is testament to the ongoing commitment of fisheries, retailers, brands, processors and NGOs to fishing our oceans sustainably, and the demand for credible third-party verification to support this. Data from our 2022 GlobeScan consumer survey also shows that consumers across multiple markets increasingly recognise the connection between their shopping habits and the state of the ocean: buying sustainable seafood was the most common action that consumers took to protect the ocean.

The UN acknowledged in its Second World Ocean assessment, published in April 2021, that fisheries management was improving in many regions and suggested that 98% of currently overfished stocks could recover by the middle of the century if the appropriate governance was in place. The UN Food and Agriculture Organization's (FAO) State of World Fisheries and Aquaculture 2022 report confirmed this trend, with 82.5% of the volume of fish landed globally coming from sustainably fished stocks – though the proportion of overfished stocks continued to rise, to 35.4%. Equally, there was welcome recognition from the International Union for Conservation of Nature (IUCN) in September 2021 that four commercially fished tuna species were on the path to recovery, thanks to countries enforcing more sustainable practices – although some individual stocks remained severely depleted.

The importance of seafood in meeting the needs of a growing global population was underlined in September 2021 with the publication of the Blue Food Assessment – a joint initiative between the Stockholm Resilience Centre, Stanford University and EAT. This keynote report highlighted the role

of seafood in alleviating hunger and reducing carbon emissions, if supported by sustainable, well-managed food systems.

In 2022, the MSC is celebrating its 25th anniversary. From just three certified fisheries at the beginning of the millennium – Western Australia rock lobster, Thames Blackwater herring and Alaska salmon – the program now encompasses more than 500 fisheries all over the world. New certifications this year included the first certified fishery in the Philippines – a small-scale yellowfin tuna handline fishery – and the Yalu Estuary Manila clam fishery in the Yellow Sea, China's first certified clam fishery.

The MSC Fisheries Standard is the world's most widely used framework providing third-party assurance for sustainable fishing. Updating it to ensure partners remain at the forefront of sustainability is a major endeavour. The latest review of the Standard has involved more stakeholders from industry, environmental NGOs, retailers, scientists and certification bodies than ever before. This participation is one of the hallmarks of the MSC's program and one of the reasons behind its success over 25 years.

US\$88.9 billion

Annual net loss in ocean benefits due to overfishing

The United Nations Second World Ocean Assessment

37.9 million

people work in wild-capture fisheries

3.3 billion

people rely on seafood for at least 20% of their animal protein, rising to more than 50% in parts of Asia and Africa

The annual value of international trade in fisheries and aquaculture products is

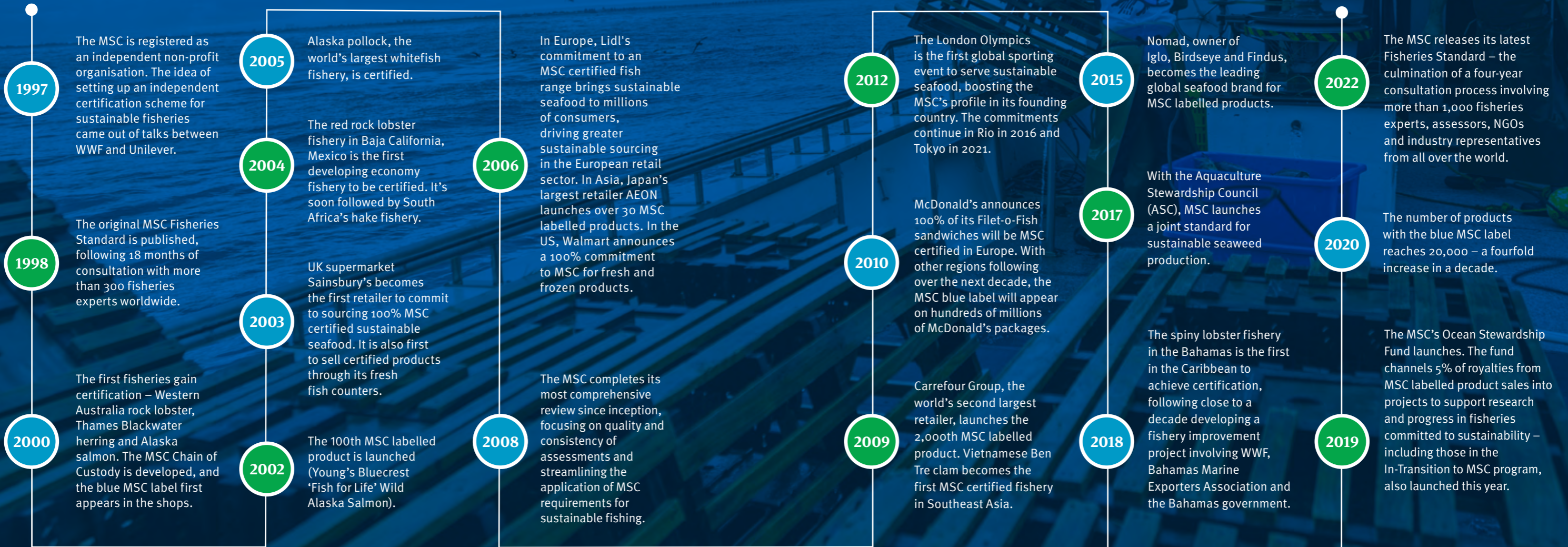
US\$151 billion

Small-scale fisheries support the livelihoods of

492 million people

The State of World Fisheries and Aquaculture 2022 (UN FAO)

25 years of MSC



The new Fisheries Standard

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By distilling science, knowledge and best practice into a tangible set of requirements for fisheries, this Standard provides one of the most powerful tools we have to ensure a sustainable future for our fisheries and oceans.

Dr Rohan Currey, MSC Chief Science and Standards Officer

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The publication of the first MSC Fisheries Standard in 1998 was a watershed moment. Drawing on the then recently published UN FAO Code of Conduct for Responsible Fisheries, it was a pioneering attempt to reach consensus on what sustainable fishing looks like in practice. The Standard was the result of discussions held over 18 months with more than 300 stakeholders – including fisheries, scientists, NGOs, industry representatives and policymakers. It set out the basic principles of maintaining fish stocks at their most productive levels, minimising environmental impacts and ensuring robust management. It also codified a detailed set of requirements and indicators to measure performance against.

The MSC Standard remains the global benchmark for sustainable fishing. But a lot can change in a quarter of a century: fishing practices evolve, scientific knowledge progresses, new concerns arise. Society's expectations and understanding of sustainability are very different from 25 years ago.

We regularly review our Standard to ensure it continues to reflect new science, the evolution and uptake of best practice in fisheries management and the wider challenges facing the ocean. The latest review has been our most comprehensive ever. Beginning in 2018, the consultation process has included workshops, surveys and virtual conferences involving more than 350 participants and 275 organisations from 46 countries. We received over 600 submissions, conducted independent research and analysis, sought advice from experts and tested the revisions in mock assessments.

Following the MSC Board of Trustees' approval, the new Fisheries Standard will be published in October 2022. We are grateful to everyone who has contributed to the process, and are confident that the fisheries that are certified against our revised Standard over the coming years will continue to be at the forefront of sustainable fishing practices globally.

What's new in our Fisheries Standard?

Endangered, threatened and protected species:

We've introduced a more precautionary process for classifying species as endangered, threatened or protected (ETP), and added additional safeguards to minimise fisheries' impacts on ETP species and allow populations to recover. Assessors will need to evaluate explicitly and objectively how fisheries impact the recovery of ETP species.

Shark finning:

The cruel and destructive practice of shark finning is already banned in MSC certified fisheries. But to reflect best practice, we're now requiring all fisheries that retain sharks to have a "fins naturally attached" policy with no exemptions and evidence of compliance is required.

Ghost gear:

To reduce the risk of marine life being caught or entangled in discarded "ghost gear", fisheries will need to take measures to prevent gear loss and minimise potential impacts (for

example, by including biodegradable elements). Ghost gear impact criteria will now be included in every assessment.

Making assessments more efficient:

We've reviewed the Standard to simplify language, remove ambiguity and reduce the number of indicators that fisheries are assessed against – without diluting the level of performance. We've also added extra guidance for assessing complex fisheries, such as those with highly fluctuating stocks or short-lived species like squid.

Evidence:

We've introduced new requirements to clarify the type and quality of information needed to certify a fishery, to ensure that assessments are made on a solid evidence base.

Harvest strategies on shared stocks:

New provisions in the Standard address the complex issue of setting harvest strategies for highly migratory species like tuna, where fisheries operate under a regional fisheries management organisation.

Increasing accessibility

Many fisheries need to make significant improvements before they are ready to be assessed against the MSC Standard. This can be particularly challenging for small-scale fisheries and fisheries in developing regions – whether because of a lack of data to set science-based catch limits, weak law enforcement or simply limited resources. We have a number of approaches to support these fisheries on their journey toward sustainability.

Our In-Transition to MSC program is open to small-scale fisheries and fisheries of all sizes in developing regions that are working toward MSC assessment within five years, although we plan to open up the ITM program to all fisheries in the coming years. Progress against their action plans is verified each

year by independent assessors. This enables the fisheries to measure their performance against the MSC Standard and demonstrate their commitment to sustainability to both funders and seafood buyers. As of March 2022, 16 fisheries from India, Indonesia, Mexico and South Africa are part of the program.

Our Pathway Projects bring together multiple fisheries and partners in a specific region. In India, seven fisheries are hoping to enter assessment to the MSC Standard over the next year via one of these projects, with a further three fisheries aiming to enter the program by 2025. The Indian Pathway Project is supported by partners including the Sustainable Seafood Network of India, WWF India, the Seafood Exporters

Association of India, and federal and state governments.

We also provide training and other tools to support fisheries to make improvements and achieve the MSC Standard. This year we launched a new fisheries management plan template, while our benchmarking and tracking tool enables fisheries to monitor and report on their progress. Our risk-based framework, updated this year, helps fisheries which lack scientific data to provide evidence that they are meeting some of our performance indicators. And as part of our capacity building work, we've launched a new online platform – available in both English and Spanish – that blends pre-recorded learning modules, videos, interactive quizzes and live sessions with assessors.

14

Pathway Projects

16

fisheries In-Transition to MSC

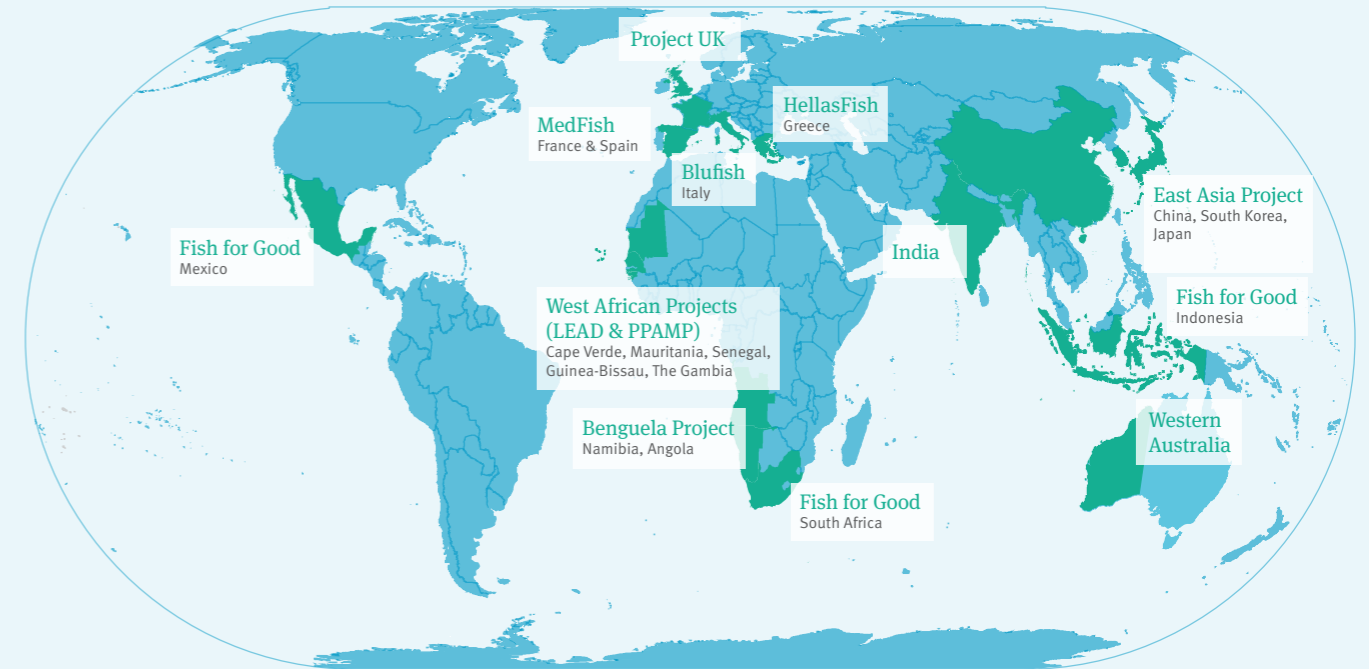
20

countries involved in Pathway Projects

54

fisheries implementing action plans

Our Pathway Projects



Western Australia: Pathway pioneer

This year marked the 10th anniversary of a world-leading commitment to sustainable fishing in Western Australia. As well as being home to the first ever MSC certified fishery, Western Australia pioneered the first state-wide initiative to promote certified sustainable fishing. In 2012, the Western Australian state government launched a AU\$14.5 million fund to support its fisheries to become MSC certified. A total of 11 fisheries along the length of the West Australian coast are MSC certified. And with others in assessment, over 90% of the state's catch by volume is now engaged in the MSC program. This includes a number of firsts: the world's first certified abalone and sea cucumber fisheries, the first MSC certified pearls, and the first co-managed commercial and recreational fishery. It's an inspiring example for other Pathway Projects around the world.

“ Western Australia's leadership and commitment to global best practice in fisheries management is being benchmarked around the world helping safeguard seafood supplies for future generations.

Anne Gabriel, MSC Program Director – Oceania and Singapore

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Ocean Stewardship Fund

US\$2.8 million
total grants awarded

64
projects and fisheries

40%
supporting developing economy fisheries

18
countries covered

24
research projects funded

Translocating sea urchins in Mexico, attaching satellite tags to stingrays in the Mediterranean, testing seabird mitigation measures in Iceland, developing DNA testing to understand bycatch risks in Indonesia: these are just some of the innovative projects underway thanks to support from the Ocean Stewardship Fund.

The Ocean Stewardship Fund supports fisheries on their pathway to sustainability, with a particular focus on small-scale fisheries and those in developing regions. Since we set up the fund in 2019, we have awarded 64 grants totalling US\$2.8 million to support a wide range of projects – but we have ambitious plans to scale up its impact.

We have committed 5% of annual royalties from MSC certified product sales to the Ocean Stewardship Fund, and are seeking external funding from third-party donors to grow the fund further. Our ambition is to raise a total of €10 million (US\$11 million) by the end of 2022. Already, we have seen generous contributions from the MAVA Foundation, which is supporting fisheries improvement projects in the Mediterranean and West Africa, and the Walton Family Foundation, which is supporting a loan guarantee scheme for fisheries committed to sustainability.

Mexico Baja California red sea urchin diver-caught fishery. © Romana Gabriela Ehuán Noh / José Alberto Zepeda Domínguez / Luis Malpica Cruz / María Teresa Tavera Ortiz / Ezequiel Carrizo

Blue swimming crab, Indonesia

More than 270,000 people on the Indonesian island of Madura rely on the blue swimming crab fishery for their livelihoods. But this valuable commodity was heavily exploited throughout the 1990s, leading to heavy declines in the number and size of the crabs caught. The Ocean Stewardship Fund has been supporting efforts to rebuild the crab population and improve the sustainability of the fishery, including avoiding interactions with endangered, threatened and protected species and tackling ghost fishing. The fishery is intending to enter full assessment against the MSC Standard over the next year.

Red sea urchin, Mexico

Mexico’s red sea urchin fishery hopes to become MSC certified by 2025. Divers harvest the sea urchins by hand, so it’s a highly selective fishery, but it’s important that harvesting levels are carefully managed. The Ocean Stewardship Fund has been supporting various improvements, with the latest grant funding research into the effects of artificially transferring sea urchins into areas where the kelp they feed on is more abundant. This could offer a “win-win” situation, allowing depleted kelp areas time to recover while the urchins thrive in their new home – but it’s vital to strike the right balance to avoid unintended consequences on the marine environment.

Deep-sea discoveries, Greenland

International scientists at ZSL’s Institute of Zoology have been working with Sustainable Fisheries Greenland to identify vulnerable seabed habitats in Western Greenland. Fish stocks are shifting in the Arctic because of climate change. As a result, it’s important that ocean habitats are mapped before fishing operations move into new fishing grounds, helping them to avoid any potential damage to sensitive ecosystems. A second grant in 2022 will support further research to map and protect rare deep-sea habitats close to certified halibut fishing operations in the Davis Strait.

Saving seabirds, South Africa

When the South African hake fishery became MSC certified in 2004, it successfully managed to reduce accidental seabird deaths by over 90% by using bird-scaring lines. But while these work well offshore, they’re less effective on smaller inshore vessels. Now, with an Ocean Stewardship Fund grant, the fishery is collaborating with BirdLife South Africa to develop bespoke measures to prevent birds colliding with trawl cables. Structural modifications for attaching bird-scaring lines have been tested on three different types of inshore vessels to date. The project is also trialling the use of cameras to monitor interactions with seabirds.



“ We had seen the need for this research to take place for a long time, but due to lack of funding and a direct way to benefit the fishing fleet, getting support had not been possible until funding from the MSC became available.

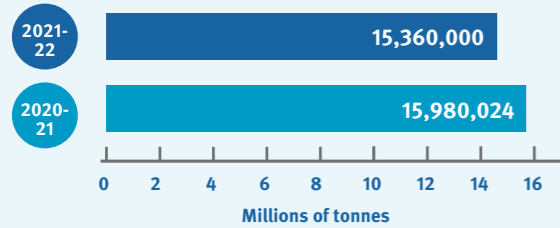
Andrea Angel, BirdLife South Africa

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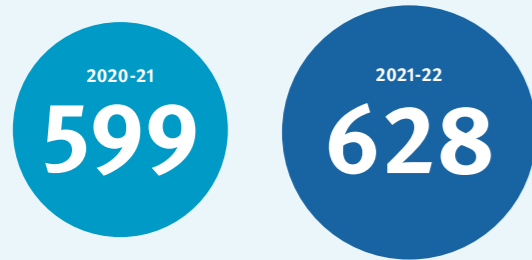
Andrea Angel of BirdLife South Africa. © MSC / Albatross Task Force

Progress on the water

MSC engaged catch remained above 15 million tonnes*



Number of fisheries engaged in the MSC program



59 countries engaged

19% of all wild marine catch was engaged with the MSC**

15%
MSC certified

2%
In assessment

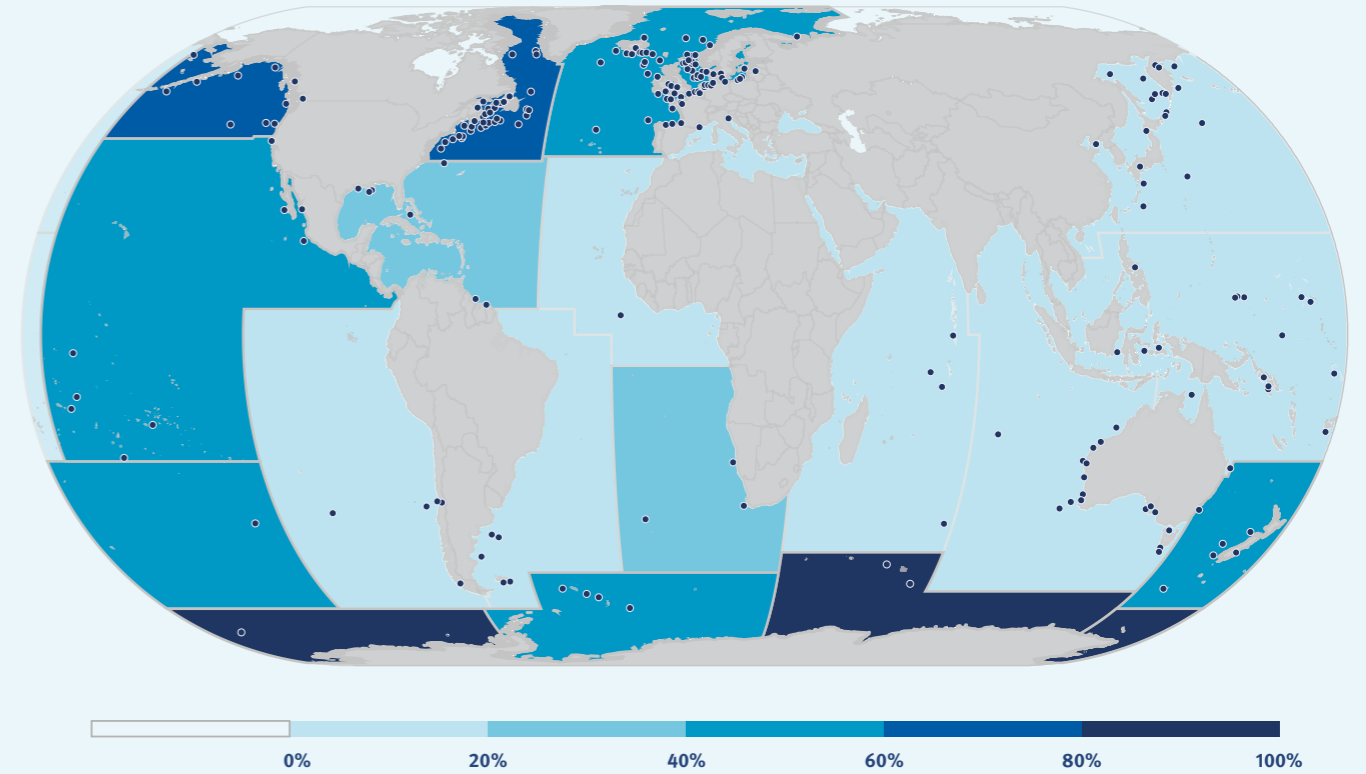
2%
MSC certified but suspended

*MSC 2021-22 marine catch (follows MSC exclusion policy and does not include farmed fish or inland fisheries) compared with latest UN FAO data (2020).

**Engaged means certified, suspended or in MSC assessment

Proportion of global catch that is MSC certified

MSC certified and suspended marine catch and fishery data as of 31 March 2022, compared with total marine catch for UN FAO Major Fishing Areas in 2020.



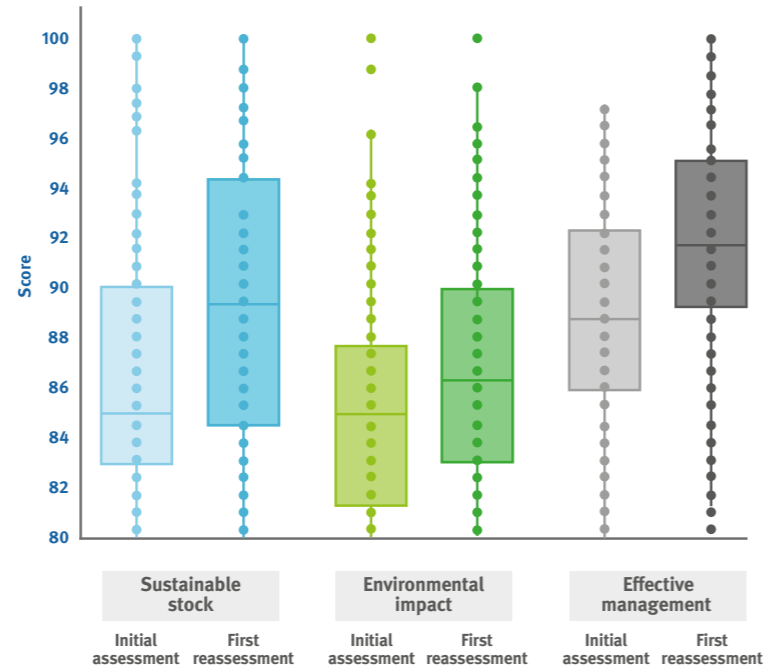
● Approximate location of MSC certified fishing activity

539 fisheries certified (of which 24 were suspended), plus another 89 in assessment

A journey of improvement

Fisheries are scored separately against the three Principles of the MSC Fisheries Standard: sustainability of the stock (Principle 1); ecosystem impacts (Principle 2); and effective management (Principle 3). To pass an assessment they must score at least an average of 80 for each Principle, indicating the fishery meets global best practice, while a score of 100 represents state-of-the-art performance.

Fisheries improve their scores as they stay in the program. The graph shows the distribution of Principle scores from all currently certified fisheries that have completed at least two full assessments against the MSC Fisheries Standards. For all three Principles, scores increased between when fisheries joined the program and the beginning of the second certification period.*



*See supplementary information file for full details of analysis.

2,087
improvements made by MSC certified fisheries up to 31 March 2022

Improvements in fisheries are often driven by conditions of certification. These require fisheries to develop an approved action plan for achieving global best practice on every one of the 28 performance indicators against which they are assessed. A condition is set if a fishery achieves minimum sustainability requirements on an indicator (at least 60) but less than best practice (80). The condition is closed when it scores 80 or above, with the time limit usually being the lifetime of a certificate, five years.

418 improvements over the last three years, consisting of:

161

improvements benefiting endangered, threatened and protected species, and reducing bycatch

107

improvements benefiting stock status and harvest strategies

76

improvements benefiting fishery management, governance and policy

74

improvements benefiting ecosystems and habitats

Fisheries improving performance

Sardines in Cornwall, UK: The Cornish sardine fishery has made several improvements over the last couple of years, closing seven conditions of certification since 2020. Members of the Cornwall Sardine Management Association are working alongside scientists at the UK government agency Cefas (Centre for Environment, Fisheries and Aquaculture) to conduct new research to improve understanding of stock dynamics. It's part of an effort to ensure sustainable management of the stock by incorporating new scientific information into their harvest strategy. The fishery also strengthened recordings of discards and slippage events (surplus catch released from nets alive while still in the water) in fisher logbooks. Slippage has since been reduced to 3% of overall catch. The fishery also installed CCTV on all vessels in the 2020-21 season to offer independent monitoring of fishery operations, alongside an observer program established in 2018.

Greenland halibut in northern Canada: The Canada Greenland halibut bottom trawl and gillnet fishery has been conducting research with the University of Windsor in Ontario, Canada, to improve understanding of potential impacts of fisheries on Greenland shark populations.

Although Greenland shark is the world's longest-living vertebrate, with some found to live for hundreds of years, much remains unknown about the population and the impacts of interactions with fisheries. The research, supported by a grant from the MSC Ocean Stewardship Fund, has fitted sharks with satellite tags to improve scientific understanding on their post-release survival as well as training fishers on best practices in handling and release. The fishery has also made changes to fishing practices to reduce bird bycatch, including setting nets after dark without floodlights, introducing heavier lines that sink faster and disposing of offal on the opposite side of the vessel from where the nets are hauled.

Northern shrimp in the Gulf of St Lawrence: The northern shrimp trawl fishery in Canada's Gulf of St Lawrence has been certified since 2009 and continues to make improvements. With its latest recertification in 2020, the fishery implemented new rules to avoid vulnerable marine habitats. At-sea observers help to ensure compliance, with logbook and satellite tracking data also recording the fishery's footprint and identifying any overlap with sensitive habitats. Fishing licence restrictions, seasonal closures and catch limits also help to prevent impacts on sensitive habitats.



Four sardine fishers hauling the net over the side of the vessel. © MSC / Nigel Millard

Early visionaries of the sustainable seafood movement

Rewind 25 years, and for most companies in the seafood sector, sustainability wasn't high on the agenda. Price, quality, taste, provenance and health considerations all influenced the seafood choices made by shoppers and diners. The long-term viability of fish stocks or the impacts of fishing practices on marine ecosystems? Not so much.

But a few companies were beginning to see things differently – and not just those serving a niche market of eco-conscious consumers, but some of the biggest names in the business.

It was consumer goods giant Unilever – then owner of the Iglo and Birdseye brands – that set up the MSC with WWF. Their commitment to using MSC labelled fish in mass-market frozen products paved the way for the certification of major whitefish fisheries including Alaska pollock, New Zealand hoki, South African hake and Russian pollock.

Leading retailers soon came on board: discount giants Aldi and Lidl in Germany, Sainsbury's in the UK, Carrefour in France. In the US, the world's largest retailer, Walmart, made waves throughout supply chains by signalling its commitment to sustainable seafood. One of Japan's largest retailers, Aeon, brought MSC labelled products into the Asian market. Food-service giants like McDonald's introduced the MSC blue label to millions of customers.

These brands and many others have helped drive the global sustainable seafood movement over the last quarter-century. By making ambitious commitments to sourcing MSC certified seafood, they have created market incentives for responsible fishers, raised consumer awareness, influenced other companies to improve their own sourcing practices and encouraged more fisheries to seek certification.

Today, sustainability is on everybody's agenda – and the commitment of our partners continues to support positive change for the future of the ocean.

Early visionaries

Iberconsa

increases sustainable seafood supplies in Southern Europe, supporting the certification of South African hake in 2004 and Namibian hake in 2020. In 2021, the company sold more than 3,600 tonnes of certified cape hake to European retailers. The company is also spearheading the launch of a fishery improvement project for Argentine hake that aims to achieve certification to the MSC Standard.

2004

2015

McDonald's

begins serving MSC labelled fish across all its restaurants in Europe, which sell around 100 million Filet-o-Fish sandwiches each year. Its US and Canadian operations follow in 2013 and 2014, followed by Japan in 2019 and South Korea in 2021.

Lidl

launches Europe's first and largest private-label product range with the blue MSC label – and it's still innovating 15 years later, with branches in Germany launching their own private-label tuna brand in 2021.

AEON

launches the first MSC labelled product from a large-scale retail chain in Japan. Today it sells more than 50 products from 29 species with the blue MSC label.

2006

2011

IKEA

commits to sell only certified sustainable seafood to its 650 million visitors in 49 markets. In 2021, IKEA's four stores in Indonesia become the first outlets in the country to receive MSC Chain of Custody certification and use the blue MSC label on their menu.

Recent partnership highlights

Japanese Consumers' Co-operative Union (JCCU)

JCCU launched an ambitious new sustainability goal, pledging that by 2030 at least half of its seafood will come from certified sources, with an emphasis on MSC and ASC products. In 2021, over 10% of its seafood was MSC certified. Japan's largest consumer organisation, JCCU serves more than 300 co-ops with 30 million members.

Iglo

This frozen food giant – part of the Nomad Group, which also owns the Birdseye and Findus brands – has been a driving force for certified sustainable seafood over the last 25 years. It already sells 100% MSC certified products in several European countries, and they were joined this year by Belgium and Portugal. The success in the latter was made possible by the certification of the Namibian hake fishery in 2020 – a process which the company advocated for over several years.

FOODSERVICE APME

One of Asia's leading food-service companies FOODSERVICE APME, achieved MSC Chain of Custody certification across Singapore, Vietnam, Thailand, Hong Kong, Cambodia and Dubai. The company's in-house premium seafood brand Ocean Gems includes three MSC certified products, which include octopus, hard-shell clam and sockeye salmon. The products are sold in retail, e-commerce and food-service outlets, including hotels, across all six countries.

E-commerce innovations

In March 2022, online retailer **Ocado** launched a new filter to make it easier for customers to find sustainable seafood on its website. And **Waitrose** in the UK launched an online equivalent of its end-of-aisle promotions to encourage seafood consumers to buy MSC labelled products.



The initiatives follow **Sainsbury's**, which first launched an online shelf for MSC labelled products as part of our UK team's Sustainable Seafood Week campaign in 2020.

Meanwhile **Amazon** launched a range of MSC labelled products online across Europe as well as in newly opened stores in the UK. The company also supported a joint marketing campaign in the US during National Seafood Month that helped attract new customers: around 25% of the MSC certified products sold on Amazon.com during the campaign were bought by new customers.

Waitrose pre-packed MSC certified seafood.
© FareLight Productions

Whitefish

From fish fingers to surimi to fish and chips, whitefish is the key ingredient in some of the world’s most popular seafood products. And thanks to the commitment of the fishing industry and supply chain partners, nearly three-quarters comes from MSC engaged fisheries.

In September 2021, the Faroe Islands cod and haddock fisheries achieved MSC certification, building on the existing certification for ling and tusk. Being able to sell MSC certified cod and haddock is a milestone for the country, which relies heavily on seafood exports for jobs and income. The push for MSC certification led the Faroese government to introduce a new scientifically based regulation limiting the number of fishing days for cod and haddock, helping to safeguard stocks.

Also newly certified in 2021 was pollock from the Russian Western Bering Sea, adding another 300,000 tonnes of MSC certified pollock to the market. The fishery has made a number of improvements in working towards the MSC Standard, carrying out scientific surveys to better understand impacts on birds and marine mammals and collecting data on bycatch. It will need to make several further improvements as a condition of certification.

The challenge of maintaining the MSC Standard was highlighted last year when the Norway inshore cod and haddock fishery chose to remove the inshore component from its recertification. This was because of the difficulty of meeting a condition around separating certified North East Arctic cod and haddock catch from non-certified coastal cod populations. The offshore cod and haddock components remain certified while the fishery is engaged with the Institute of Marine Research and management authorities to understand the cod challenges and hopes to reinstate its inshore certificates in the near future.

One of the main markets for Norwegian cod is Portugal, which consumes around a fifth of all cod caught globally. Demand for MSC certified cod is growing quickly in the country, thanks to the commitment of leading brand Riber Alves to increase its MSC labelled seafood. A third of Riber Alves’ sales of frozen, salted and ready-to-cook cod are now MSC certified.



Iceland: 10 years of leadership

Icelandic Sustainable Fisheries (ISF), an organisation created to manage the Iceland fishing industry’s engagement with the MSC program, celebrated its 10-year anniversary in 2022. The organisation has pursued a remarkable achievement: 98% of the country’s landings now come from fisheries that are MSC certified (including suspended). ISF has been a pioneer in gaining certification for new species including global firsts for golden redfish, capelin, ling, tusk, wolffish, blue ling, anglerfish, lemon sole and lumpfish, along with popular whitefish like cod, haddock, plaice and saithe.

ISF Icelandic capelin. © Hreinn Sigurdsson



Fishmonger holding a cod fillet. © MSC

In numbers...

6,149,000
tonnes MSC engaged catch*

74%
of global wild whitefish catch from MSC engaged fisheries**

MSC Volume of MSC labelled sales (tonnes)



174 MSC engaged fisheries

146 improvements made over the last three years by certified fisheries

81 Endangered, threatened and protected species and bycatch

40 Ecosystems and habitats

22 Stock status and harvest strategy

3 Fishery management, governance and policy

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

Small pelagics

Vital for marine food webs, small pelagic species make up a quarter of the world’s fish catch. The proportion of the small pelagic catch engaged in the MSC program has more than tripled to 18% in the last eight years.

Back in 2014, just 4% of the wild catch of small pelagic fish was engaged in the MSC program. Engaging with more small pelagic fisheries has been one of our strategic priorities because of their importance in marine ecosystems and extensive use in aquaculture feed. Our aim is for a third of small pelagic fisheries to be engaged in the program by 2030. To achieve this, we’re focusing on working with fisheries in South America and North Africa. Also contributing to this goal is a project funded by the MAVA Foundation, which is supporting small pelagic fisheries in Mauritania, Senegal, Gambia and Guinea-Bissau to work toward the MSC Fisheries Standard.

One of the main uses of small pelagics is as fish meal for feed in the aquaculture industry, and with farmed fish consumption continuing to grow, it’s vital that this is sustainable. This was highlighted in the new ASC Feed Standard released in June 2021, which requires certified fish farms to ensure their feed comes from progressively more sustainable sources at each recertification – with the aim of reaching 100% MSC certification for marine ingredients.

Calls for action on North East Atlantic quotas

With governments failing to listen to the scientific advice on recommended North East Atlantic pelagic quotas, the supply chain has been pushing for action.

Fishing states in the North East Atlantic have failed to reach an agreement over joint management plans for mackerel, Atlanto-Scandian herring and blue whiting stocks. Instead, they have set individual quotas far above sustainable limits: since 2015, combined catches have exceeded sustainable levels by 34%, or 4.8 million tonnes. As a result of not implementing quotas in line with scientific advice, in combination with a decline in overall stock health, the fisheries in question had their MSC certification suspended in 2019 and 2020 – a major blow to the companies that are committed to buying these species from sustainable sources.

The North Atlantic Pelagic Advocacy Group, which represents around 50 retailers and seafood companies, has been leading calls for an agreement on lower catch limits. And the MSC has been pushing for action at international events including at the Arctic Circle Assembly. Encouragingly, there were signs of progress at the annual meeting of the North East Atlantic Fisheries Commission in November 2021, with a declaration that all parties are committed to reach quota-sharing agreements for all three stocks within the 2022 period. However, there is a long way to go to achieve a quota share agreement in line with scientific advice from the International Council for the Exploration of the Sea (ICES), so it is essential that the pressure for progress continues.

In the meantime, some brands have been looking elsewhere to bring consumers sustainable mackerel. Leading retailers Migros in Switzerland, Delhaize in Belgium and Albert Heijn in the Netherlands have all recently begun selling MSC certified Chilean jack mackerel, and German seafood brand Followfood is about to launch canned Chilean jack mackerel bearing the blue MSC label. The Chilean-based mackerel fishery achieved MSC certification in 2019, shortly followed by a Dutch-flagged fleet in 2020: their recognition by high-value European markets demonstrates how fisheries that meet the stringent requirements of MSC certification can benefit from new opportunities where demand for certified sustainable seafood is high.

In 2021, the combined individual quotas for mackerel, Atlanto-Scandian herring and blue whiting exceeded ICES advice by 41%, 35% and 25% respectively.

Capelin certification

While disputes continue over other small pelagics in the North East Atlantic, the certification of the Icelandic capelin fishery shows effective international management of shared stocks is possible. Although the capelin’s distribution has shifted in recent years, an effective coastal states agreement and harvest control rules have enabled the fishery to adapt to shifts in the distribution of the capelin stock.

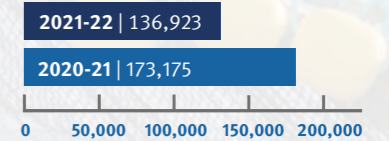
Icelandic Sustainable Fisheries (ISF) granted Greenland and Norway access to its MSC certification for capelin, reducing costs and ensuring close cooperation between fishery clients. With the certification of the Faroe Islands’ share of the capelin catch in February 2022, all Icelandic capelin fishing operations are now MSC certified. The hope is that this will contribute to an ongoing effective coastal states agreement.

In numbers...

4,296,000
tonnes MSC engaged catch*

18%
of global wild small pelagic catch from MSC engaged fisheries**

MSC
www.msc.org
Volume of MSC labelled sales (tonnes)^



62 MSC engaged fisheries

47 improvements made over the last three years by certified fisheries

10 Endangered, threatened and protected species and bycatch

3 Ecosystems and habitats

21 Stock status and harvest strategy

13 Fishery management, governance and policy

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

^eco-labelled products largely destined for human consumption, engaged catch more representative of volumes destined for fishmeal/oil and human consumption

Tuna

Sales of MSC labelled tuna products jumped 24% in the last year as a growing number of brands fulfilled their pledges to source certified sustainable tuna. The proportion of the global catch of major commercial tuna fisheries engaged in the MSC program grew to 57%.

Retailers drive growth in sustainable tuna

Recent years have brought a rapid increase in certified tuna volumes – from 14% of the world’s major commercial tuna catch in 2014 to almost 40% today. Sales of MSC labelled tuna reached 136,000 tonnes, compared to 50,000 tonnes five years ago. And with several fisheries entering assessment this year, the market is set to grow further.

Retailers have been instrumental in driving growth in MSC certified tuna sales, particularly for canned tuna, as they seek to meet consumer demand for sustainably sourced seafood. In May 2021, for example, Lidl Germany began the switch to using MSC certified skipjack tuna in its private-label brand, Nixe – the blue MSC label is now appearing on Nixe tuna cans across the country. In the US, Walmart began a partnership with The Nature Conservancy and the Marshall Islands to supply MSC certified canned skipjack tuna for its Great Value brand, with profits being directed back into Pacific Island communities.

The Bolton Group, which owns tuna processor Tri Marine, has also been a key player in transforming the tuna industry.

As well as launching MSC labelled products through its brands such as Rio Mare and Saupiquet, by 2024 Bolton has pledged to source 100% of its tuna from MSC certified fisheries or from those working to meet the MSC Standard through robust fishery improvement projects.

Calls for collaboration in Western Central Pacific

Highly migratory species like tuna require international management – individual fisheries can’t operate sustainably in isolation. That’s why, when fisheries in the Western Central Pacific achieved MSC certification, it came with conditions that the 26 member states of the Western Central Pacific Fisheries Commission – the regional management body that oversees the stocks – must agree on harvest strategies and control rules to ensure the future sustainability of shared tuna stocks.

However, this has proved hard to achieve. With the region supplying over half the global commercial tuna catch and nearly three-quarters of MSC certified tuna, failure to make progress could slow momentum toward a sustainable tuna industry.

Tuna highlights from 2021-22

A traditional handline tuna fishery in the Philippines became the first in the country to achieve MSC certification, following a 10-year improvement project supported by WWF.

With support from the Ocean Stewardship Fund, the MSC certified Echebatar tuna fishery in the Indian Ocean is carrying out research working with AZTI to better understand and mitigate the impacts of derelict fish aggregation devices (FADs) on coral reefs and other vulnerable ecosystems. It has also been working to design and construct biodegradable FADs.

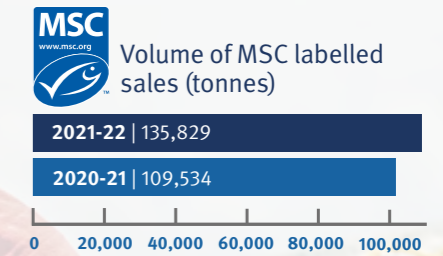
American Tuna was the first company to market MSC certified tuna in the US, sourced from the American Albacore Fishing Association, the first MSC certified tuna fishery in the world. The business started in 2007 with just eight pallets and a single MSC certified tuna product caught one by one in the North Pacific. Today, the company supplies 33 MSC certified tuna products from several fisheries to multiple retailers.



In numbers...

2,882,000
tonnes MSC engaged catch*

57%
of global wild tuna catch from MSC engaged fisheries**



124 MSC engaged fisheries

38 improvements made over the last three years by certified fisheries

12 Endangered, threatened and protected species and bycatch

1 Ecosystems and habitats

3 Stock status and harvest strategy

22 Fishery management, governance and policy

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

Hamis pulls tuna to the boat. © MSC

Octopus and squid

Cephalopods are relative newcomers to the MSC program. It was almost 20 years before the first certification of an octopus fishery: an artisanal fishery in Asturias in north-west Spain, certified in 2016 and recertified in August 2021. The first squid fishery followed two years later. And while a handful more fisheries have been certified since, there’s still a long way to go before the MSC label becomes a common sight on polpo or calamari.

Part of the challenge is that octopus and squid have very different population dynamics from most fish and shellfish. They have short lifespans – typically only around one to three years – and numbers can fluctuate dramatically according to the environmental conditions. As a result, it can be challenging to calculate maximum sustainable yield, which is part of the MSC Standard’s usual scoring criteria for assessing the sustainability of the stock.

To overcome this, as part of our Fisheries Standard Review we’ve proposed additional guidance to support squid and octopus assessments. This involves using alternative reference points and strategies for maintaining stock levels, such as ensuring that a certain percentage of the total biomass is left in the sea. The research triggered by one of the conditions from the Asturias certified fishery has

also led to the development of a more precautionary new reference point, so-called “latent productivity”, that is better adapted to short-lived and naturally fluctuating stocks such as cephalopods.

We’ve also been supporting cephalopod fisheries working toward the MSC Standard. This includes one of the biggest octopus fisheries in the world, located on Mexico’s Yucatan peninsula, which is part of the In-Transition to MSC program. This year, the fishery received a grant from the Ocean Stewardship Fund to help improve catch data collection and monitor the use and impact of certain crab species as bait. Its progress was also highlighted as part of our International Symposium on Octopus Sustainability, held in Vigo, Spain and broadcast online to 150 participants from around the world on World Octopus Day (8 October). The conference highlighted the

need for greater support from the supply chain to help octopus fisheries become sustainable and meet global demand.

Strengthening the management of octopus and squid fisheries is all the more important since they are among the few marine species that may benefit from a warming ocean. This could open up opportunities to increase supplies of sustainable seafood and help fishing communities to adapt to climate change – but only if stocks are carefully managed. In addition, an Ocean Stewardship Fund project looking at alternative sources of bait for Australian tuna and billfish fisheries has identified recently certified sustainable squid from the US as a possible solution.

It may have been a slow start, but the story of certified sustainable squid and octopus has a long way to go.

“ The Yucatan octopus fishery is very important both nationally and internationally, with a great impact on fishing communities. Funding from the Ocean Stewardship Fund is allowing us to identify areas to implement improvements throughout the fishery’s supply chain.

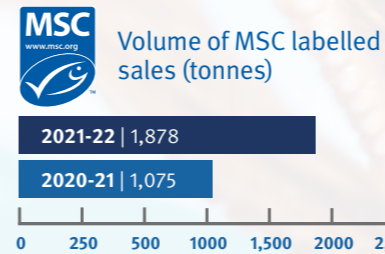
Lorena Rocha Tejada, Comunidad y Biodiversidad (COBI)



In numbers...

71,000
tonnes MSC engaged catch*

20%
of global wild cephalopod catch from MSC engaged fisheries**



6 MSC engaged fisheries

5 improvements made over the last three years by certified fisheries

- 1** Endangered, threatened and protected species and bycatch
- 1** Stock status and harvest strategy
- 3** Fishery management, governance and policy

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

Crab and lobster

With two new certifications and two recertifications in the past year, fishers around the world are stepping up to meet growing demand for certified crab and lobster.

Argentine southern king crab

The Argentine Patagonian southern king crab fishery achieved MSC certification in March 2022, becoming the fourth fishery in Argentina to be certified. The fishery will now be able to sell certified king crab to its main export markets in China, Japan and the US.

The certification is a milestone in a long journey of improvement. The crab traps include escape rings to minimise bycatch of juvenile crabs and other species, and must include a biodegradable component to prevent “ghost fishing” if traps are lost.

A student research project funded through the MSC’s Ocean Stewardship Fund scholarship program provided key information about how effectively the escape rings helped reduce spider crab bycatch in the fishery.

The fishery will continue to make sustainability improvements through a condition of certification, including providing evidence of the measures taken to avoid negative impacts on other species and habitats.



Recertification drives further improvements in crab fisheries

Two Western Australian crab fisheries recertified this year are making innovative improvements as conditions of certification.

The crystal crab fishery, which operates in remote waters around 200km from the coast of Western Australia, is collecting information about impacts on deep-sea habitats. With a grant from the Ocean Stewardship Fund, it will attach underwater cameras and lights to the crab traps, allowing researchers to analyse potential impacts on different habitat types. Although the fishery has used cameras before, this is the first time they have been able to operate in deep-water habitats, hundreds of metres below the surface.

The Peel Harvey estuary fishery, which targets both blue swimmer crab and sea mullet, is the only co-managed commercial and recreational fishery to achieve certification. While it successfully closed all the conditions attached to its original certification, when it was reassessed against an updated version of the MSC Standard, further areas for improvement were identified. One of these was around potential impacts on migratory wading birds in the nearby wetland of international importance in Mandurah. With support from the Ocean Stewardship Fund, researchers will use high-resolution satellite imagery, machine learning and on-site surveys to investigate how fishing activity overlaps with and affects wading bird populations.

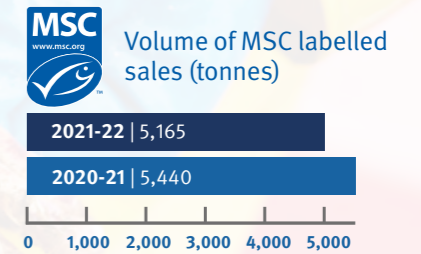


Measuring a brown crab. © MSC / David Loftus

In numbers...

277,000
tonnes MSC engaged catch*

14%
of global wild crab and lobster catch from MSC engaged fisheries**



50 MSC engaged fisheries

43 improvements made over the last three years by certified fisheries

23 Endangered, threatened and protected species and bycatch

4 Ecosystems and habitats

9 Stock status and harvest strategy

7 Fishery management, governance and policy

“ These funds, kindly provided by MSC, will help us ensure the sustainability of two of our fisheries – so we’re grateful for this. The MSC program has been important to me personally, as it’s improved our ability to better share our passion for getting the science right with industry colleagues.

Dr Dan Gaughan, Chief Fisheries Scientist, Government of Western Australia

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

Salmon

Alaska salmon was one of the first fisheries to be MSC certified back in 2000, and as one of the world's most popular fish species, it remains a key part of the MSC program.

The popularity of salmon has been soaring in Germany in recent years – German consumers eat more salmon than any other type of fish. Although much of this is farmed, there's an ever-growing range of sustainable wild salmon bearing the blue MSC label.

Among the pioneers in the German market was salmon specialist

Gottfried Friedrichs, one of Germany's oldest seafood companies. In 2002, the family-owned company was the first in Germany to offer MSC certified smoked Alaska salmon, and it continues to put sustainability at the heart of its range.

In the past 12 months, 165 wild salmon products carrying the MSC ecolabel have been launched in Germany, Austria and Switzerland. These include frozen fillets and chilled prepared products – as well as 42 new pet food products containing MSC certified salmon.

One new salmon fishery was certified this year, the Kolkhoz Udarnik Karaginsky Gulf Karaga Bay and Litke Strait Pacific salmon fishery on Russia's Kamchatka peninsula. This latest achievement takes the total number of Kamchatka salmon fisheries meeting the MSC Standard to 30. Sadly, it is likely to be the last for some time. Following Russia's invasion of Ukraine, Assurance Services International – which oversees the organisations that carry out certification assessments – has suspended all new assessments in Russia for the time being.

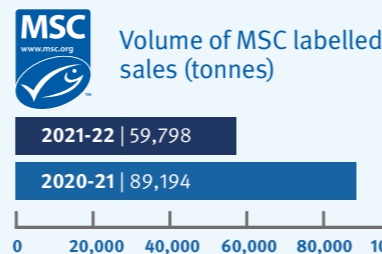
Wild crispy skin salmon with white bean and coriander puree. © MSC



In numbers...

488,000
tonnes MSC engaged catch*

82%
of global wild salmon catch from MSC engaged fisheries**



44 MSC engaged fisheries

20 Improvements made over last three years by certified fisheries

-  **3** Endangered, threatened and protected species and bycatch
-  **11** Stock status and harvest strategy
-  **6** Fishery management, governance and policy

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



Prawn and shrimp

A total of 34 prawn and shrimp fisheries are now certified to the MSC Fisheries Standard, from common shrimp caught in Chilean waters to northern shrimp in the Barents Sea. Shrimp and prawn fisheries have also made significant improvements to fishing practices, minimising impacts to sensitive marine life.

MSC labelled potted shrimp comes to Sainsbury's

If future generations are to enjoy traditional seafood favourites, then they need to be sustainable today – so the launch of the first MSC labelled potted shrimp is cause for celebration. The British dish, known as one of James Bond's favourite delicacies, is made from brown shrimp in butter flavoured with nutmeg and other spices. Available in Sainsbury's under The Good Tide brand since September 2021, the MSC labelled potted shrimp is handmade by the Seafood and Eat It company. The shrimps come from the North Sea brown shrimp fishery, which became MSC certified in December 2017.

Meanwhile, another certified shrimp fishery – the Wash brown shrimp fishery – has been gathering better data on the types of species it encounters and identifying mitigation measures to ensure it isn't hindering the recovery of any endangered, threatened or protected species. The project, driven by a condition of certification, is being supported through an MSC student research grant. The Wash brown shrimp fishery lands around 95% of the common shrimp (*Crangon crangon*) caught in UK waters.

Barents Sea shrimp certification

The FIUN Russian Barents Sea northern shrimp fishery achieved certification in September 2021. The fleet includes around 25 vessels, which landed more than 25,000 tonnes of shrimp in 2019. It joins an array of MSC certified fisheries from Canada, Greenland, Iceland, the Faroe Islands and Norway targeting northern prawn (*Pandalus borealis*) in Arctic waters. It also now joins other North Atlantic countries trying to deliver more effective harvest controls rules to ensure long-term protection of these abundant stocks.

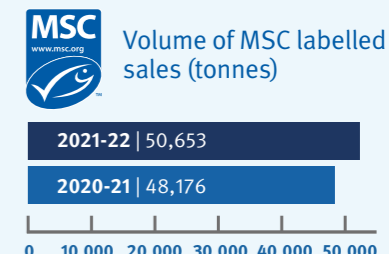
E-commerce giant in China sells certified prawns

In November 2021, JD.com, China's largest e-commerce company, pledged to prioritise MSC certified sustainable sources for the launch of its new JMeal brand. The line includes 10 new products including cold-water prawns from certified fisheries in Norway.

In numbers...

351,000
tonnes MSC engaged catch*

11%
of global wild prawn and shrimp catch from MSC engaged fisheries**



34 MSC engaged fisheries

44 Improvements made over last three years by certified fisheries

-  **16** Ecosystems and habitats
-  **13** Endangered, threatened and protected species and bycatch
-  **11** Stock status and harvest strategy
-  **4** Fishery management, governance and policy

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

Bivalves

Clam first points to growth of sustainable seafood in China

A clam fishery in the Yellow Sea has become the first in China to achieve MSC certification. The Yalu Estuary Manila clam fishery was certified in September 2021, following a successful fishery improvement project that began in 2016. The project was supported by WWF and Dandong Taihong Foodstuff, a major supplier of seafood to the Japanese market.

But while demand from Japan and other export markets was one of the drivers behind seeking certification, the fishery also hopes the annual harvest of around 200,000 tonnes will help create a larger market for MSC labelled products within China. Chinese consumers are increasingly interested in sustainability: the 2022 MSC GlobeScan survey found that almost three-quarters of Chinese seafood consumers believed that we need to consume fish and seafood from sustainable sources in order to save the ocean.

The Manila clam fishery is the sixth Chinese fishery to achieve MSC certification. Operating in the mudflats of the Yalu River estuary, an important area for migratory birds, it supports the livelihoods of many coastal communities.

The Yalu Estuary Manila clam fishery. © MSC

“ The Yalu Estuary clam fishery will be the first of many. The success of this pilot project has encouraged not only clam fisheries, but also crab, squid and anchovy fisheries to consider entering the MSC program.

An Yan, MSC China Program Director

Scallop first

In October 2021, the Abrolhos Island and Mid-West scallop trawl fishery became the first scallop fishery in Australia to achieve MSC certification.

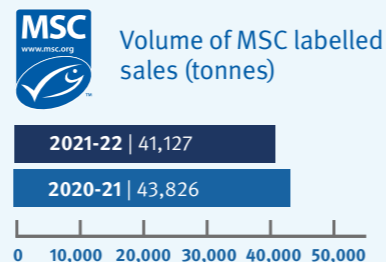
Contributing more than AU\$5 million to the regional economy, it's the 11th commercial fishery in Western Australia to achieve certification – meaning that around 90% of the state's fisheries by value are now MSC certified.

A second, larger scallop operation just south of Melbourne shortly followed, with the Bass Strait central zone scallop fishery achieving certification in March 2022 – adding a further 2,500 tonnes of certified sustainable scallops on the market for consumers.

In numbers...

370,000 tonnes MSC engaged catch*

17% of global wild bivalve catch from MSC engaged fisheries**



50 MSC engaged fisheries

22 Improvements made over last three years by certified fisheries

- 2 Ecosystems and habitats
- 5 Endangered, threatened and protected species and bycatch
- 6 Stock status and harvest strategy
- 9 Fishery management, governance and policy

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

Seaweed

Seaweed certification has taken off since the launch of the MSC-ASC Seaweed Standard in 2017, with a total of 1,500 tonnes already certified and 11,500 tonnes in assessment. Consumers could soon be eating sustainable crispy seaweed snacks after a Korean farm became the first of its kind to be certified against the joint ASC-MSC Standard.

Laver is one of the most popular varieties of edible seaweed. Usually dried into sheets for use in snacks and sushi, it is also known as nori, or gim in Korea. Pulmuone, one of the most popular food brands in Korea, encouraged the local laver farm to be certified and it became the third Korean producer to achieve the ASC-MSC Standard. Pulmuone launched the certified seasoned laver, roasted laver and dried seaweed snacks to export to Europe and the USA as well as supply in domestic markets. The farm grows two seaweed species from floating

rafts off the western coast of Korea. The seaweed grows so quickly that it can be harvested after just 50 days.

The Yellow Sea on Korea's west coast is rich in biodiversity, and various seaweed species provide an important habitat for cephalopods, crustaceans, fish and shellfish. As part of the certification process, auditors confirmed that the farm does not have any adverse effects on the aquatic ecosystem or local biodiversity.

Certified seaweed is also disrupting the aquaculture industry. A year after microalgae producer Veramaris achieved certification, its algal oil is being sourced by Florida-based aquaculture company Atlantic Sapphire and US-based salmon feed company Skretting. Rich in Omega-3, the certified algae are enabling the companies to reduce the fish oil content of their feed by 25%.

“ Team Veramaris was exceedingly proud to be the first natural marine algal oil producer to be certified by ASC-MSC, supporting the continued sustainable growth of aquaculture while taking pressure off finite forage fish resources, traditionally used as a source of Omega-3. It has been an exciting journey of collaboration along the value chain, working with feed mills, farmers, food processors and retailers to achieve a common vision of sustainable growth.

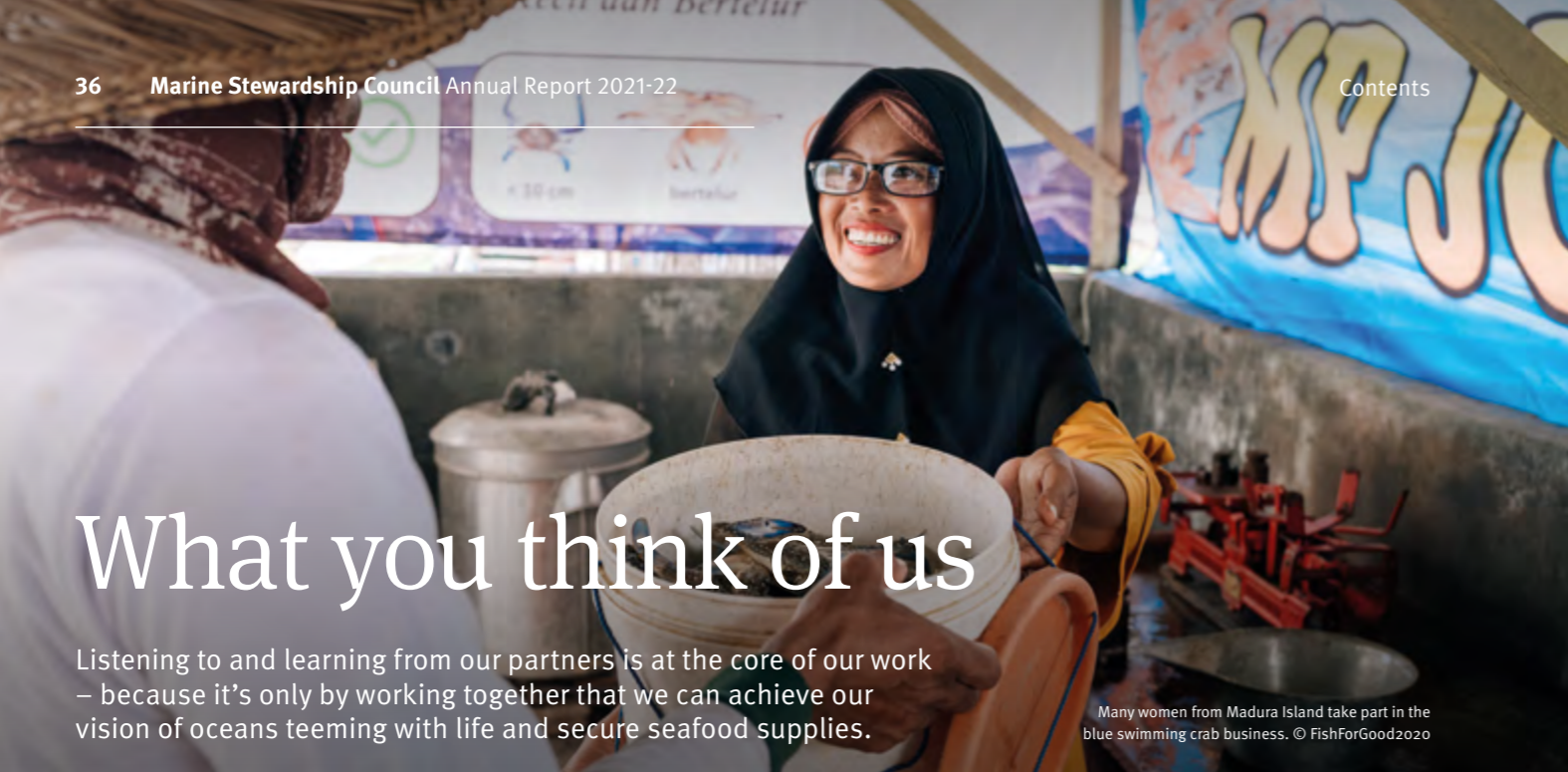
Karim Kurmaly, Chief Executive Officer, Veramaris

In numbers...

13,000 tonnes MSC engaged harvest*

49 Engaged farms

"Cottonii" seaweed farm in front of Semaya village. Although many seaweed farms in Nusa Penida Island were damaged and closed because of ice-ice disease, seaweed in Semaya village was healthy and green. © Makoto Suzuki / MSC



What you think of us

Listening to and learning from our partners is at the core of our work – because it’s only by working together that we can achieve our vision of oceans teeming with life and secure seafood supplies.

Many women from Madura Island take part in the blue swimming crab business. © FishForGood2020

More than 1,000 people shared their views through the independently run MSC Global Stakeholder Survey 2021. The online survey was an opportunity for those who engage with the MSC to tell us what they think about us and to suggest areas for improvement. We received responses from every continent, from fisheries, seafood businesses, NGOs, scientific institutes, governments and many more.

The survey also reflected the competing priorities that we have to balance. Many industry stakeholders would like to see less complexity, lower costs and fewer barriers to participation to expand the impact and scale of the MSC program – but NGOs and other civil society stakeholders tend to request stricter criteria.

Overall, there was a strong level of support, with 79% saying they were likely to speak favourably about the MSC. Seven out of 10 said they had a high level of trust in the MSC to contribute to ending overfishing – which was identified as the most urgent ocean issue. Around half said they were satisfied with the MSC Standards, with very few expressing dissatisfaction.

While we’re seen as a credible certification and ecolabelling program, participants said they would like the MSC be a leading voice on ocean issues. They wanted the MSC to act as an authority on sustainable fishing and seafood, to raise consumer awareness and advocate for stronger government policies, and to grow our scale, reach and scope to cover more markets, types of fisheries, species and social issues.

We’re grateful to everyone who took part, and are incorporating feedback into our new strategic plan, which is currently being developed.

“ The MSC should be a vocal leader in defining what sustainable seafood is, how to measure a healthy ocean, and what seafood consumers can do to contribute toward a healthy ocean. ”

– Retailer/brand, North America

Global Seafood Consumer Perceptions Survey

Every two years, independent research consultancy GlobeScan carries out the largest survey of its kind to understand the latest consumer attitudes to ocean health, seafood consumption and ecolabels.

The 2022 survey polled over 25,000 consumers across 23 countries.*

48% of consumers surveyed say they have **seen** the MSC label (up from 46% in 2020)

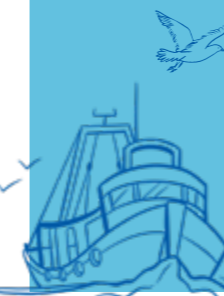


56% of consumers that recognise the MSC label **understand** what it means (up from 53% in 2020)

78% of consumers who have seen the MSC label say they **trust** its claims [up from 75% in 2020]

60% of seafood consumers say seeing the MSC label would make them **more likely to purchase** a product

44% of seafood consumers put **overfishing** in their top 3 most worrying ocean issues



Buying more sustainable seafood is the number one action seafood consumers say they will take to protect the ocean



24% had bought sustainable seafood **in the last year**



39% say they will buy more sustainable seafood **in the future**



Globally, people said their top reasons for protecting the oceans were...

Because oceans are necessary for the **future health of the planet.** 63%

To prevent ocean **wildlife from going extinct.** 60%

So their **children and grandchildren** will have healthy oceans. 51%

*The survey was carried out in Australia, Austria, Belgium, Canada, China, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Poland, Portugal, Singapore, South Africa, South Korea (new in 2022), Spain, Sweden, Switzerland, UK and USA using online questionnaires. A total of 25,869 consumers were surveyed across these countries between 25 January and 16 March 2022, including 20,127 seafood consumers. The global averages reported are based on all 23 markets unless stated otherwise. For global averages, each country is weighted equally, regardless of sample size.

Building awareness and understanding of the MSC

With the easing of Covid-19 restrictions in retail environments and the return of in-person events, we have been able to expand our marketing and communication efforts – from award ceremonies and seafood expos to education events with schools, it was great to be out and about with our partners again.

Chefs, partners, fishers and consumers from around the world came together to promote sustainable seafood for our “Big Blue Future” **World Ocean Day** campaign.

We had 161 partners involved, including 72 ambassadors and influencers. The campaign was rolled out across 20 countries, translated into 18 languages and reached 37 million people around the globe – including educating over 15,000 children about looking after the ocean.



As part of our education program, we developed a partnership with **World Ocean Day for Schools**, a coalition of organisations with a mission to engage schools globally in ocean literacy reaching over 5,000 subscribers.

We also collaborated with Teachers For Future Spain on an educational project about sustainable fishing, **reaching more than 10,000 students.**



McDonald's began selling MSC labelled Filet-O-Fish burgers in its 407 restaurants in South Korea in April 2021. We marked the occasion with a month of promotional activities in store and online, including a YouTube advert with over half a million views.



In the UK, “**All Hands on Deck**” was the theme of our second Sustainable Seafood Week, with over 40 commercial, fishery and institutional partners joining us to raise awareness of sustainable seafood. The campaign included billboard and bus stop ads, digital marketing and social media, more than 70 pieces of media coverage, and support from MSC UK chef Ambassadors Mitch Tonks and James Strawbridge. **The campaign achieved a reach of over 5.7 million.**



In the US, we joined forces with ecolabels Fairtrade America and Non-GMO on a campaign to celebrate “**Little Labels That Make a Big Impact**” during Good Food Month. We developed a toolkit for retailers, ran joint webinars and collaborated with dozens of retailers to promote the campaign. For National Seafood Month in October, we ran an MSC label awareness campaign on Amazon’s online video platform and TV streaming service which was seen 1.5 million times.

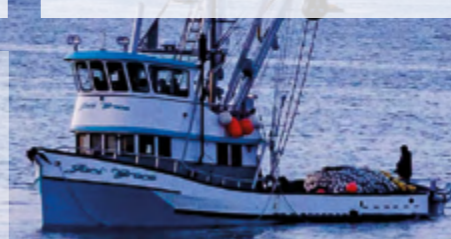


We held our first **Seas Forever Week** in Portugal in November. Chefs and artists joined the campaign to promote the importance of sustainable seafood. The event involved an art installation of a painted boat on display at the Oceanário de Lisboa (public aquarium) and a local branch of Continente, Portugal’s biggest retailer.

Local artist Tomás Pires or ‘ÔJE’ helped to illustrate and inform people of the importance of protecting our marine resources. Chef Ricardo Luz was also on hand to share his top sustainable seafood tips.



We celebrated 10 years of the MSC in Spain with an event at the prestigious Círculo de Bellas Artes in Madrid. More than 100 people participated, including representatives from certified fisheries, commercial partners, NGOs, government officials, MSC ambassadors and journalists.



Our funding and donors

This year we would especially like to thank the many donors, including trusts, foundations and statutory bodies, from across the globe that have supported our work. In addition to the generous support for MSC's many projects, we also received significant and new generous grants for our Ocean Stewardship Fund. This has included support from the MAVA Fondation pour la Nature to help small-scale fisheries in the Mediterranean and Western Africa as well as from the Walton Family Foundation to establish a new loan guarantee facility, enabling fisheries working towards sustainable management practices to access additional financing.

We would also like to thank the Dutch Postcode Lottery for its continued core support; the Walton Family Foundation for its continuing generous support for projects around the world; the David and Lucile Packard Foundation for facilitating our East Asia Sea Pathway to Sustainability project; the Adessium Foundation for supporting our work in the Mediterranean; the A.G. Leventis Foundation for a grant to work with small-scale fisheries in southern Africa. Finally, we also continue to receive generous core support from the Triad Foundation and Holzer Family Foundation for which we are truly grateful.

MSC Cornish sardine fishery. © Oliver Berry

We would like to thank the following organisations for their support:

US Foundations

David and Lucile Packard Foundation
Walton Family Foundation
New Venture Fund
Remmer Family Foundation
Triad Foundation
Holzer Family Foundation

UK Trusts and Foundations

A.G. Leventis Foundation

European Foundations

Adessium Foundation (Netherlands)
Dutch Postcode Lottery
MAVA Fondation pour la Nature (Switzerland)

Statutory bodies

MMO (Marine Management Organisation, for Project UK)

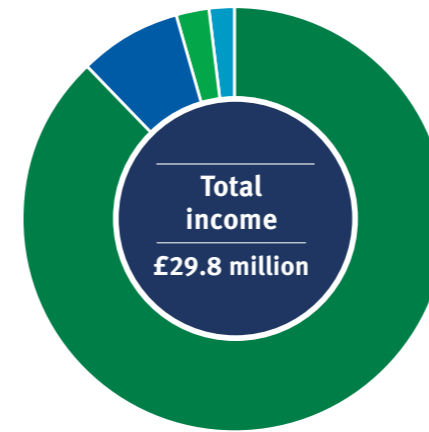
NGOs

WWF-Sweden
WWF-UK (for Project UK)

Corporate

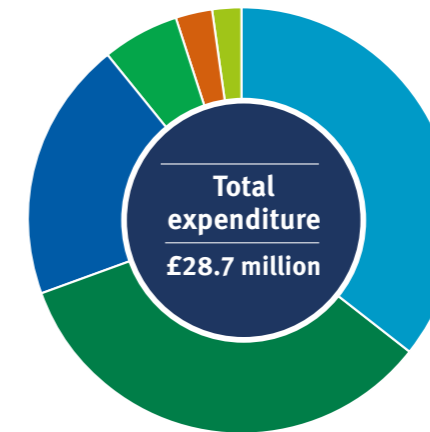
Project UK (various)

Our finances 2021-22



Where the money comes from

- 8.0% Donations and legacies
- 1.7% Other trading activities
- 87.8% Income from charitable activities (logo licensing)
- 2.5% Income from investments



Where the money goes to

- 19.8% Policy and maintenance of Standard
- 35.8% Education and awareness
- 33.8% Commercial and fisheries servicing and outreach
- 5.7% Logo licensing
- 2.7% Ocean Stewardship Fund
- 2.2% Expenditure on raising funds

Total funds at 31 March 2022: £40.7 million

Compared with total funds of £38.8 million on 31 March 2021

Other gains and losses in the year not shown under income or expenditure amounted to a gain of £0.8 million

Report by the Trustees on the summarised financial statements

The summarised financial information is extracted from the full statutory trustees' annual report and financial statements which were approved by the trustees and signed on their behalf on 26 July 2022.

An unqualified audit report was issued in relation to the full statutory trustees' annual report and financial statements by our auditors Crowe U.K. LLP on 15 August 2022.

The auditors have confirmed to the trustees that, in their opinion, the summarised financial information is consistent with the full financial statements for the year ended 31 March 2022. This summarised financial information may not contain sufficient information to gain a complete understanding of the financial affairs of the charity. The full statutory trustees' report, financial statements and auditors' report may be obtained in writing from Finance Director, Marine Stewardship Council, 1 Snow Hill, London, EC1A 2DH, United Kingdom.

Signed, on behalf of the Trustees:

Werner Kiene,
Chair, MSC Board of Trustees
15 August 2022

Governance 2021-22

The MSC Board of Trustees

The MSC Board of Trustees is the MSC's governing body. With advice from the Technical Advisory Board and the Stakeholder Advisory Council, it sets the strategic direction of the MSC, monitors progress and ensures the MSC meets its objectives.

Dr Werner Kiene
Chair

Mr Paul Uys
Chair, Marine Stewardship
Council International Board

Ms Amanda Nickson
Co-Chair, Stakeholder
Advisory Council

Ms Stefanie Moreland
Co-Chair, Stakeholder
Advisory Council

**Dr Christopher
Zimmermann**
Chair, Technical Advisory
Board

Mr Giles Bolton

Ms Maria Damanaki

Mr Stuart Green

Mr Jim Leape

Mr David Lock

Dr Kevin Stokes

Welcome to new members:

Mr Kristjan Th. Davidsson

Thank you to
departing members:

Mr Eric Barratt

Membership is correct as of 31 March 2022

The Technical Advisory Board

The Technical Advisory Board advises the MSC Board of Trustees on technical and scientific matters relating to the MSC Standards, including developing methodologies for fishery and supply chain certification and accreditation and reviewing the progress of fisheries certifications.

**Dr Christopher
Zimmermann**
(Germany) Chair

Dr Florian Baumann
(Germany)

Dr Tim Essington
(USA)

Dr Victor Restrepo
(USA)

Dr Keith Sainsbury
(Australia)

Ms Michèle Stark
(Switzerland)

Mr Sergey Sennikov
(Russia)

Mr Adam Swan
(UK)

Dr Rebecca Lent
(USA) (Co-opted Member)

**Mr José Augusto Pinto de
Abreu**
(Brazil) (Co-opted
Member)

Thank you to
departing members:

**Ms Lucia Mayer
Massaroth**

Ms Kerry Smith

Marine Stewardship Council International Board

The Marine Stewardship Council International (MSCI) Board provides oversight of the MSC's ecolabel licensing and fee structure.

Mr Paul Uys
MSCI Chair

Dr Werner Kiene
MSC Board of Trustees
Chair

Mr Rupert Howes
MSC Chief Executive

Ms Valentina Tripp

Welcome to new members:

Mr Giles Bolton

Mr Fernando Lago

Thank you to
departing members:

Mr Eric Barratt

Mr Jeff Davis

Membership is correct as of 31 March 2022

The MSC Stakeholder Advisory Council

The MSC's Stakeholder Advisory Council provides advice to the MSC Board of Trustees and input into the MSC's review processes and provides a formal body through which stakeholders can provide their views to the MSC. It includes representatives from the seafood industry, conservation community, market sector and academia. The membership reflects diverse experiences, geographies and interests in relation to the work of the MSC.

Ms Amanda Nickson
Paul M Angell Family
Foundation, USA

Ms Stefanie Moreland
Trident Seafoods, USA

Dr Johann Augustyn
SADSTIA, South Africa

Ms Heather Brayford
Government of Western
Australia, Department of
Primary Industries and
Regional Development,
Australia

Mr Rory Crawford
Birdlife International/
RSPB, UK

Ms Yumie Kawashima
Aeon, Japan

Mr Tor Larsen
Norwegian Fishermen's
Association, Norway

Dr Ghislaine Llewellyn
WWF International,
Australia

Ms Christine Penney
Clearwater Seafoods,
Canada

Mr Ivan Lopez Pesquera
Ancora, Spain

Mr Marco Quesada
Conservación
Internacional, Costa Rica

Membership is correct as of 31 March 2022

Ms Carmen Revenga
The Nature Conservancy,
USA

**Ms María José Espinosa
Romero**
Comunidad y
Biodiversidad A.C (COBI),
Mexico

**Thank you to
departing members:**

Ms Agathe Grossmith

“

At the MSC, we are humbled by what our partners have achieved over the last 25 years – and determined to play our part in tackling the challenges ahead.

Rupert Howes, Chief Executive, Marine Stewardship Council

”



Share with friends and colleagues

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All data in this report is correct as of 31 March 2022, unless otherwise stated. The reporting year is 1 April 2021 to 31 March 2022.

Registered Charity number: 1066806. Registered Company number: 3322023

Find out more:

info@msc.org

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