



Sustainability and Trust in Seafood

10 Years of Consumer Insights

October 7, 2026



PANELISTS



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AGENDA

MSC introduction

Research background and approach

Key findings

MSC Earth Month 2027 Campaign

Q&A

ABOUT THE MSC

Globally-recognized certification and labeling program for environmentally sustainable fishing.

Our mission is to recognize and reward environmentally sustainable fishing practices, positively influence the choices people make when buying seafood and work with our partners to transform the seafood market to a more sustainable basis.



CELEBRATING 30 YEARS IN 2027

For thirty years, the MSC and our partners have helped build and drive the sustainable fishing movement. It's a huge achievement!

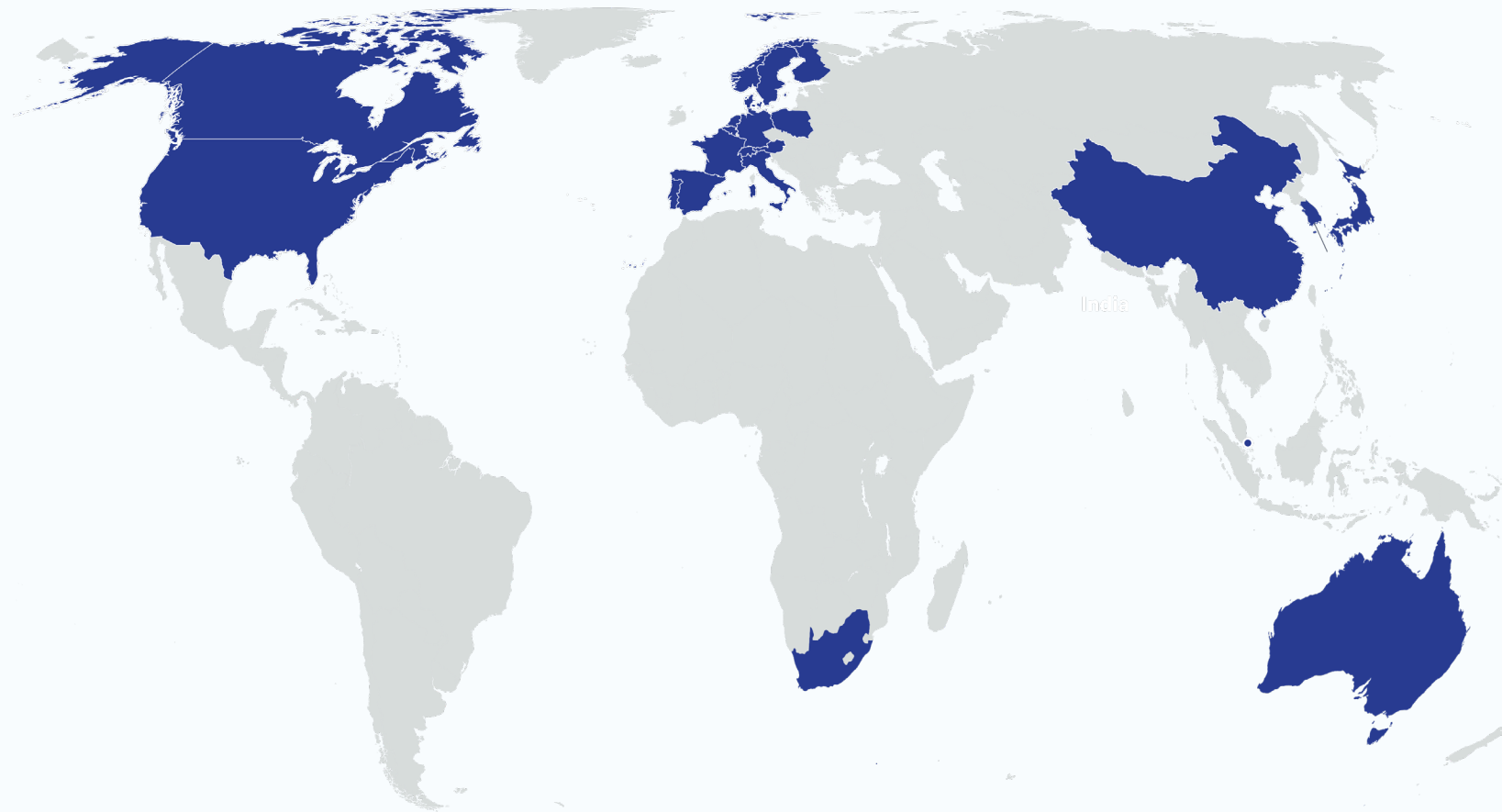
Stay tuned for more on how we will mark the occasion next year.



Background and Approach



2026 global consumer insights from GlobeScan and MSC



Australia • Austria • Belgium • Canada • China • Denmark • Finland • France • Germany • Italy • Japan • Netherlands • Norway • Poland • Portugal • Singapore • South Africa • South Korea • Spain • Sweden • Switzerland • United Kingdom • United States



23
markets

January – March 2026

31,074 consumers
20,543 seafood consumers



33
markets

July – August 2026

32,106 consumers

Focus on Canada and the US



The focus of this session is

Canada and the USA

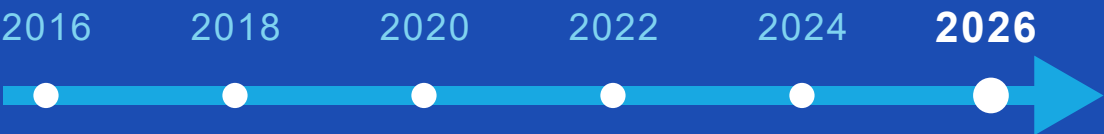


- 6,136 *consumers*
- USA *n*=3,784
 - Canada *n*=2,352

- 2,515 *consumers*
- USA *n*=1,507
 - Canada *n*=1,008

- 4,003 *seafood consumers*
- USA *n*=2,500
 - Canada *n*=1,503

10 YEARS OF TRACKING



Key Findings

Consumer Interest and Ecolabels



Consumers are noticing ecolabels more than ever

Opinions on ecolabels, “describes opinion well” (5+6+7 on a 7-point scale), Consumers in Canada and the USA, 2018–2026



I notice ecolabels when shopping

CHANGE SINCE 2018

+15 pts

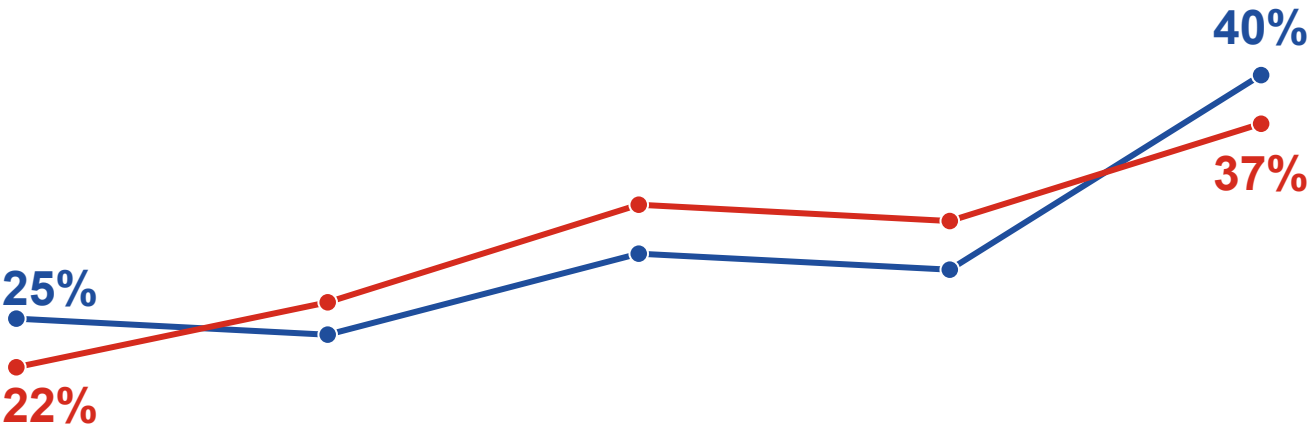
USA

25% → 40%

+15 pts

Canada

22% → 37%



2018

2020

2022

2024

2026

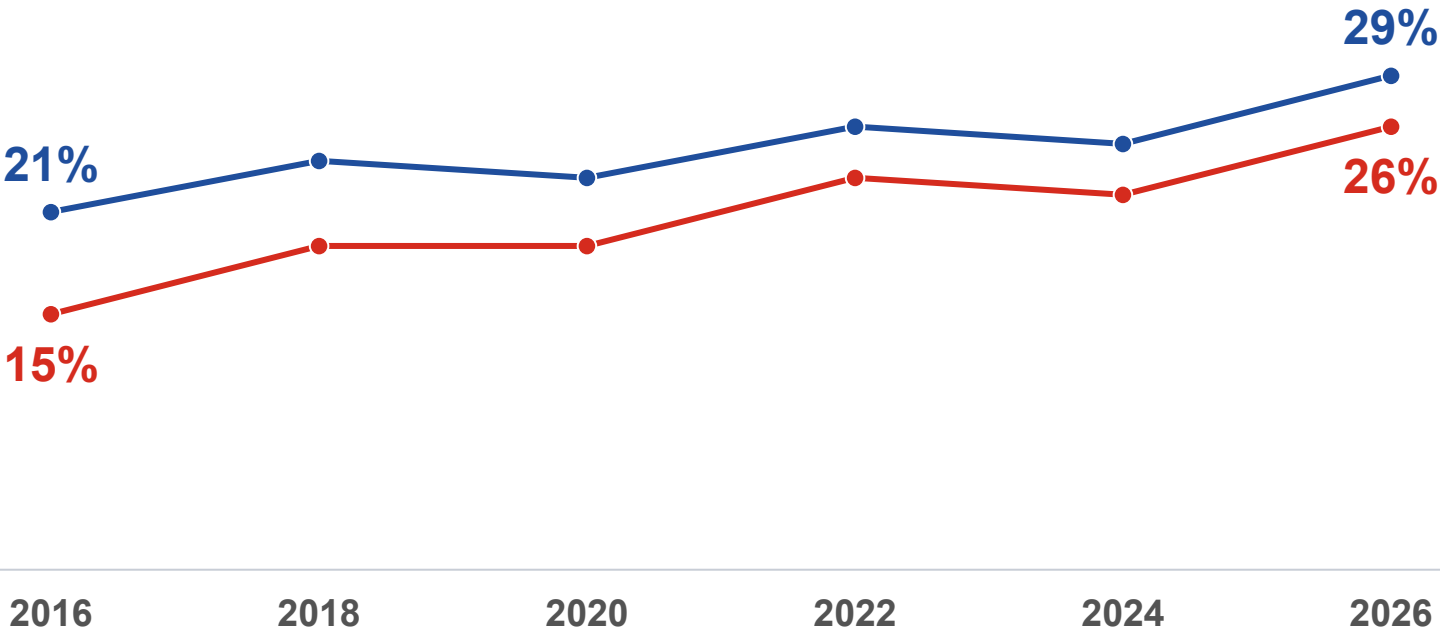
Q8: How well does each of the following statements describe your opinions about ecolabels? – I notice ecolabels when shopping.

Seafood consumers increasingly feel they are helping protect oceans

Contributing well to protecting the world’s ocean environment (6+7 on a 7-point scale), seafood consumers in Canada and the USA, 2016–2026



Consumers of seafood, like me and my family contribute to protecting the ocean



CHANGE SINCE 2016

+8 pts

USA

21% → 29%

+11 pts

Canada

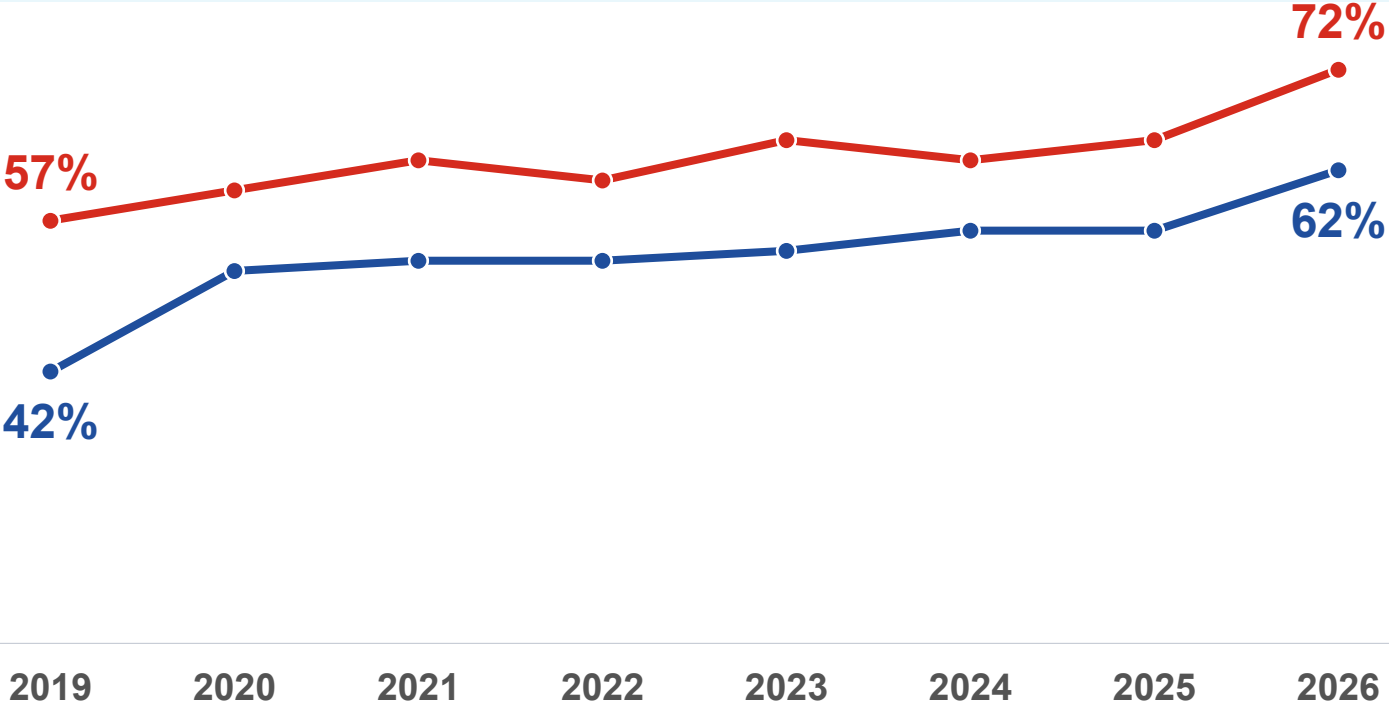
15% → 26%

Many in Canada and the USA feel they are doing all they personally can to protect the environment

% who agree (1+2 on a 5-point scale), “I am doing all I personally can to protect the environment and nature,” consumers in Canada and the USA, 2019–2026



I am doing all I personally can to protect the environment



CHANGE SINCE 2019

+15 pts
Canada
57% → 72%

+20 pts
USA
42% → 62%

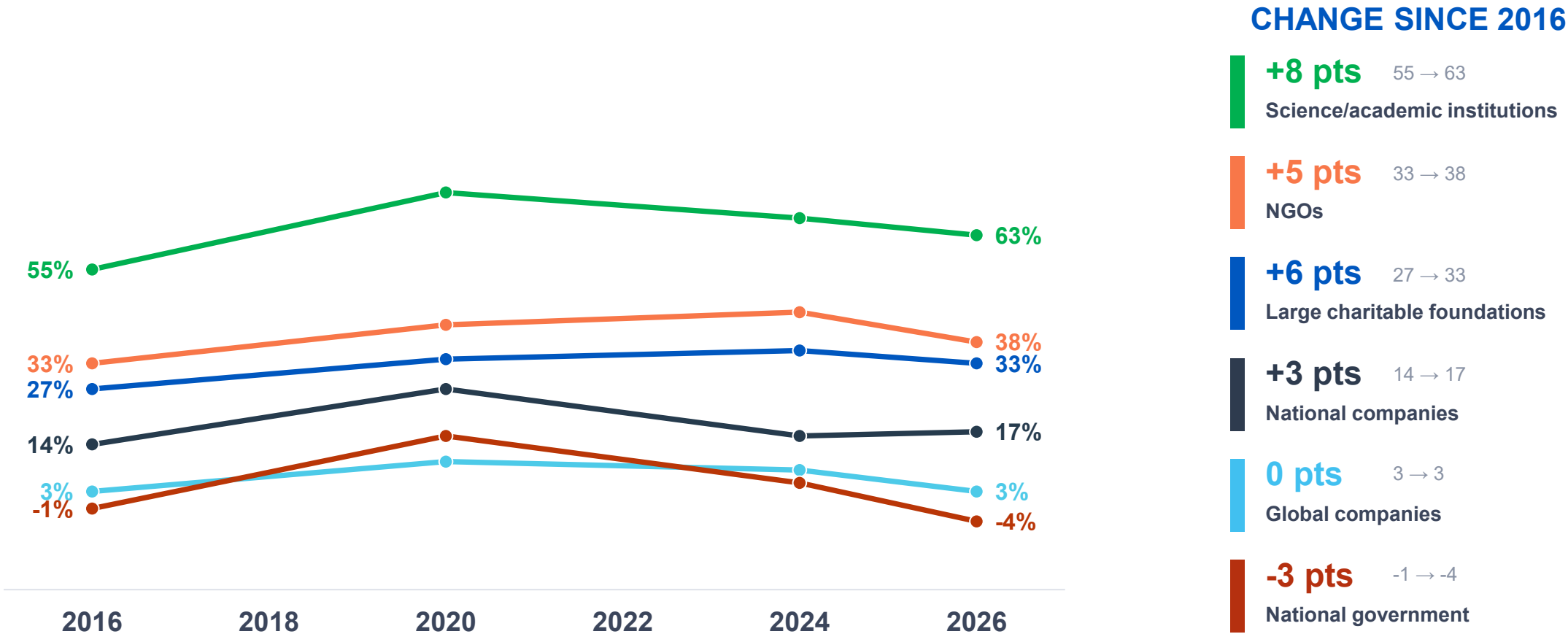
Trust Challenges



GlobeScan's decades of tracking trust show that scientific and academic institutions and NGOs are among the most trusted institutions globally



Thick trust in institutions, net trust,* average of 16 countries,** 2016–2026



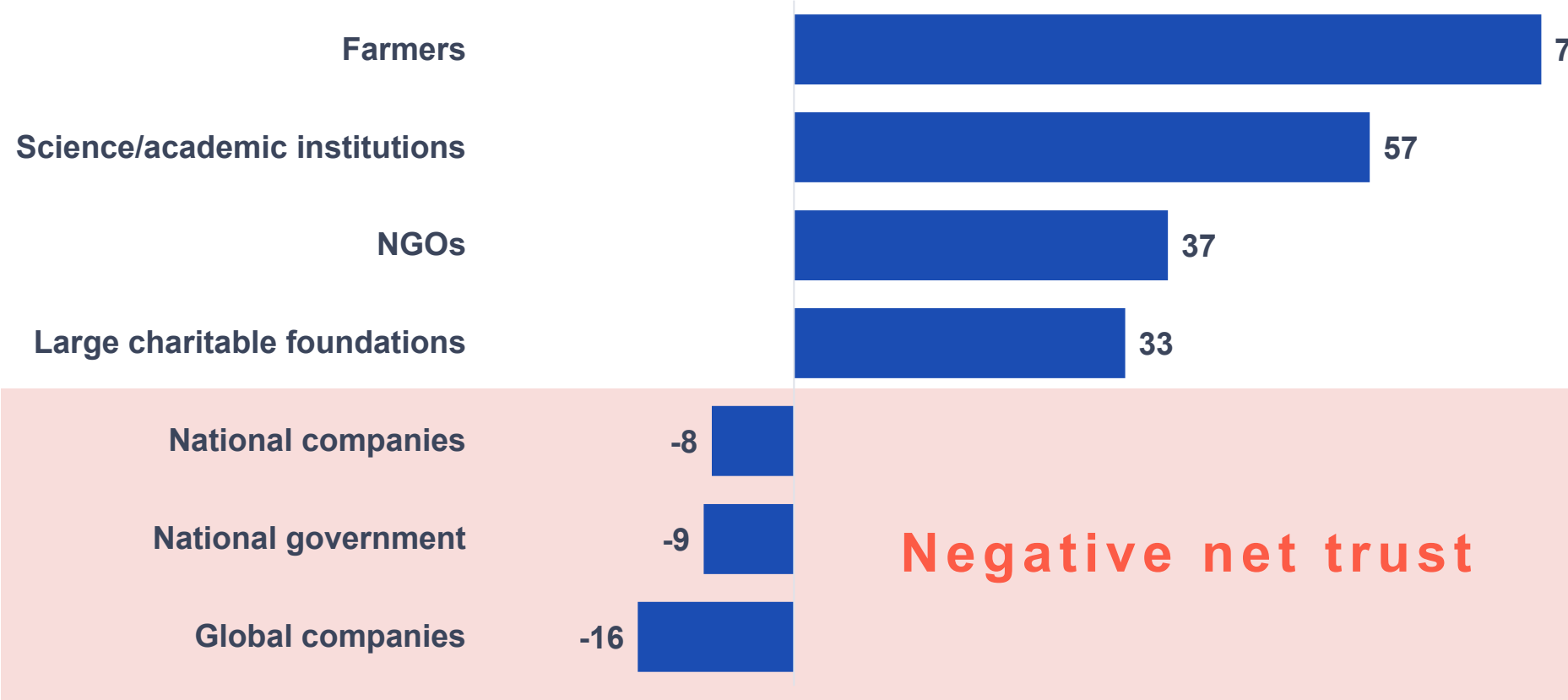
*“A lot of trust” and “Some trust” minus “Not much trust” and “No trust at all”

**Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, South Korea, Spain, Türkiye, UK, and USA. Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

15 T3. Please indicate how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

This extends to Canada and the USA, where companies are less trusted

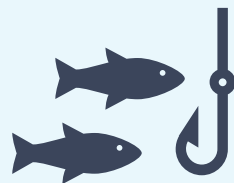
Thick trust in institutions, net trust,* consumers in Canada and the USA, 2026



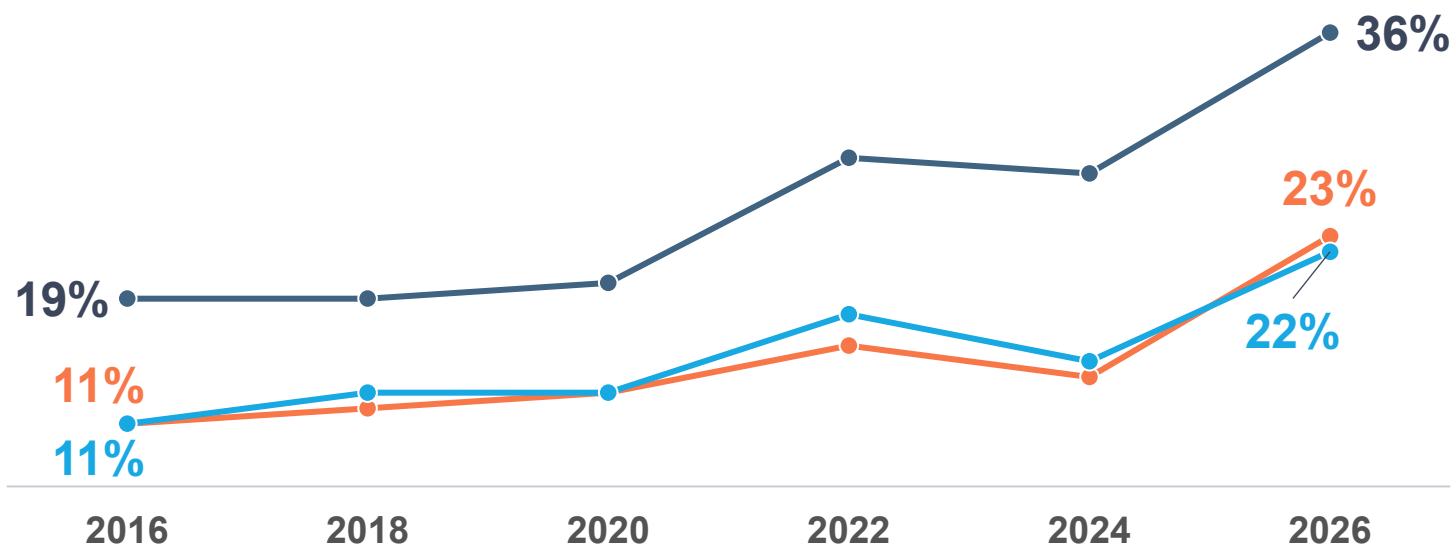
*“A lot of trust” and “Some trust” minus “Not much trust” and “No trust at all”

The fishing industry is increasingly recognized for ocean protection, followed by large companies and retailers

Contributing well to protecting the world's ocean environment (6+7 on a 7-point scale), seafood consumers in Canada and the USA, 2016–2026



The fishing industry is contributing well to protecting the ocean



CHANGE SINCE 2016

+17 pts

The fishing industry

19% → 36%

+12 pts

Large companies and brands

11% → 23%

+11 pts

Shops and retailers

11% → 22%

Even with improved performance, there is a strong gap in meeting consumer expectations

Contributing well to vs responsible for protecting oceans (6+7 on a 7-point scale), seafood consumers in Canada and the USA, 2026



Q3.1b: Some people believe that action needs to be taken to protect the world’s ocean environment. How responsible should each of the following groups or institutions be for protecting the world’s oceans?

Q3.1: How well do you think the following groups or institutions are contributing to protecting the world’s ocean environment?



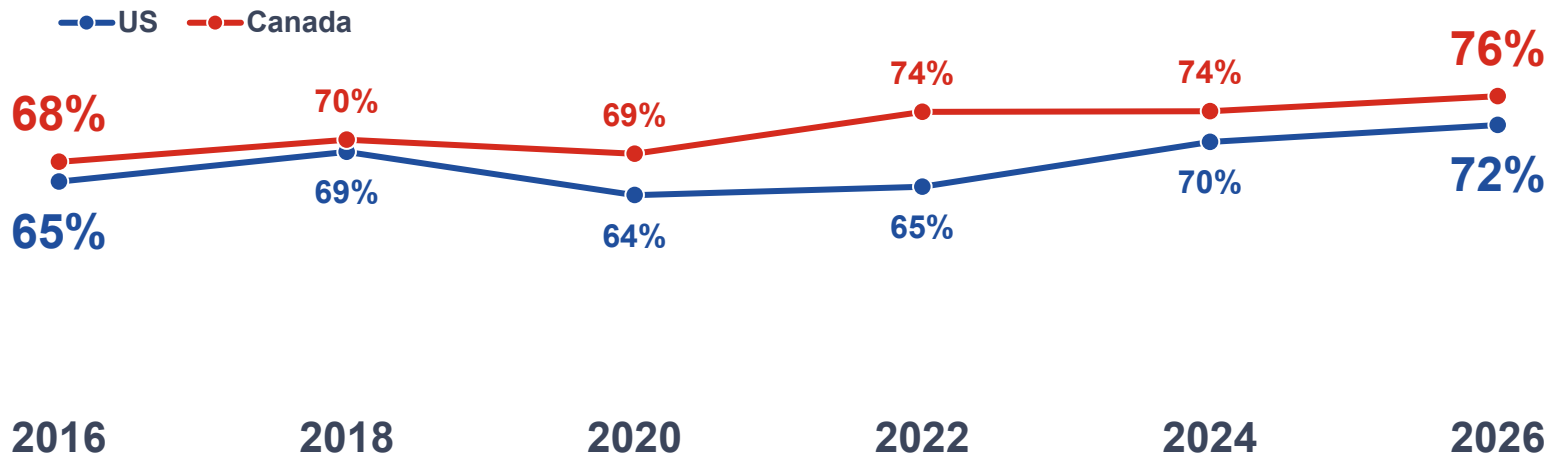
Independent Verification



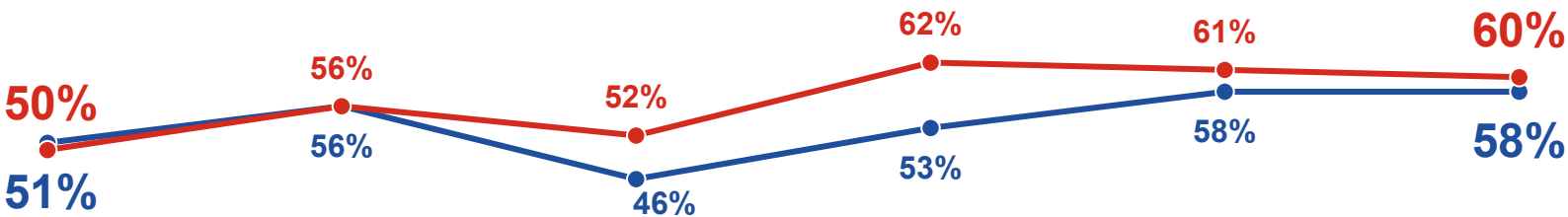
There is wide agreement on brand claims needing independent verification, signaling a steady decade-long shift toward transparency

Describes opinion well (5+6+7 on a 7-point scale), seafood consumers in Canada and the USA, 2016–2026

Supermarkets' and brands' claims about sustainability need to be clearly labeled by an independent organization



I sometimes doubt that the fish in products I buy is really what the label says it is



Q5_7. How well does each of the following statements describe your opinions? - Supermarkets' and brands' claims about sustainability and the environment need to be clearly labelled by an independent organization. I sometimes doubt that the fish in products I buy is really what the label says it is.

Seafood consumers increasingly want to know whether it is trusted and traceable

Opinions on seafood, “describes opinion well” (5+6+7 on a 7-point scale), seafood consumers in Canada and the USA, 2016–2026



I want to know that the fish I buy can be traced back to a known and trusted source

CHANGE SINCE 2016

+8 pts

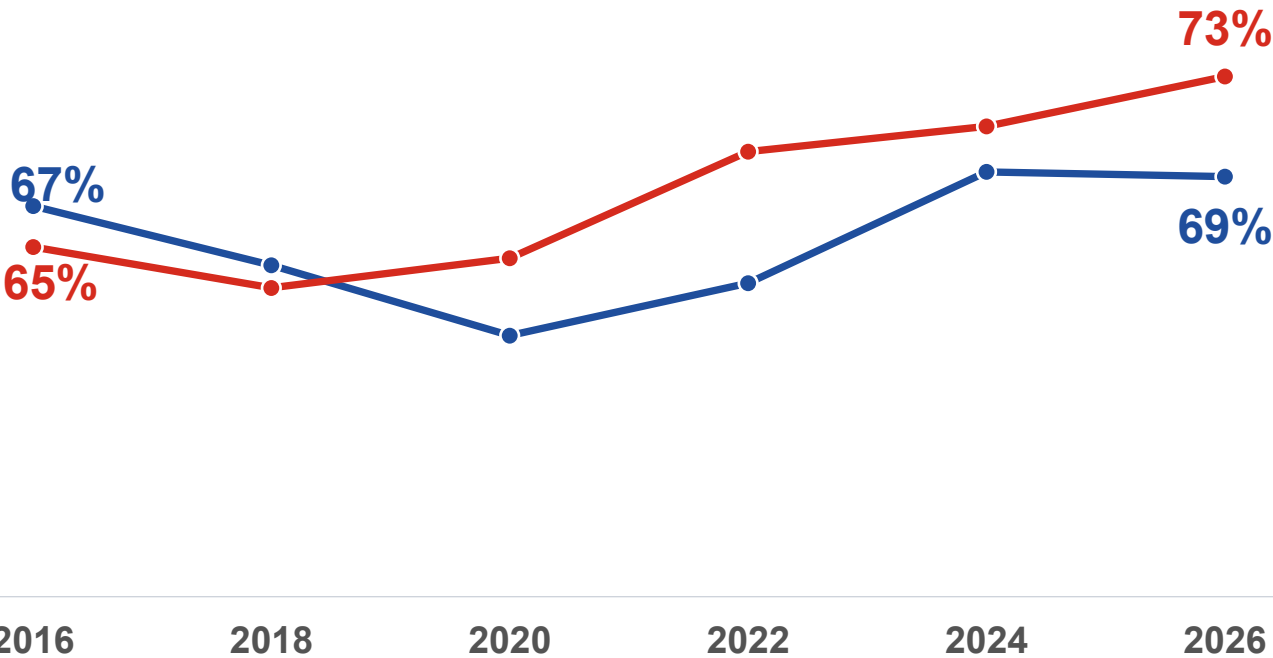
Canada

65% → 73%

+2 pts

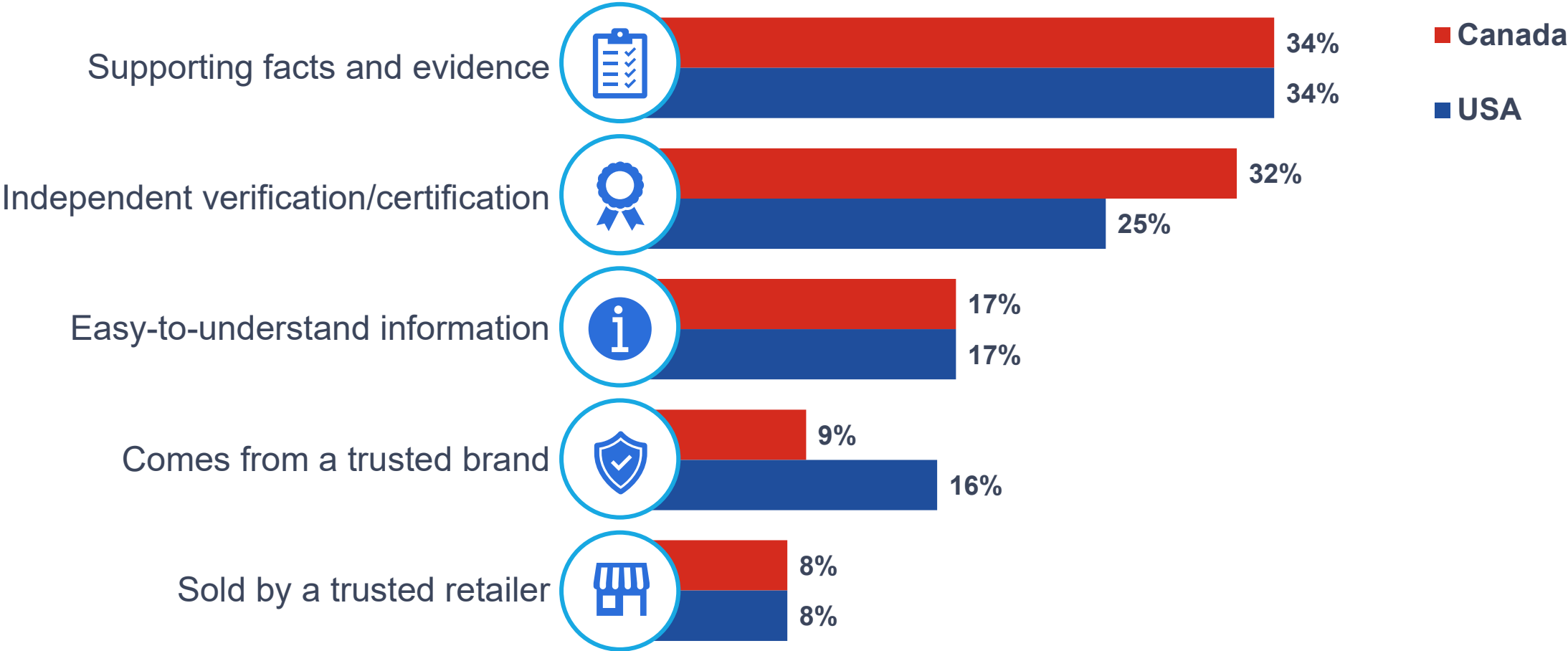
USA

67% → 69%



Supporting evidence and independent certification are the top ways to build trust with a skeptical public

Most likely to make you trust information about environmentally-friendly brands, consumers in Canada and the USA, 2026

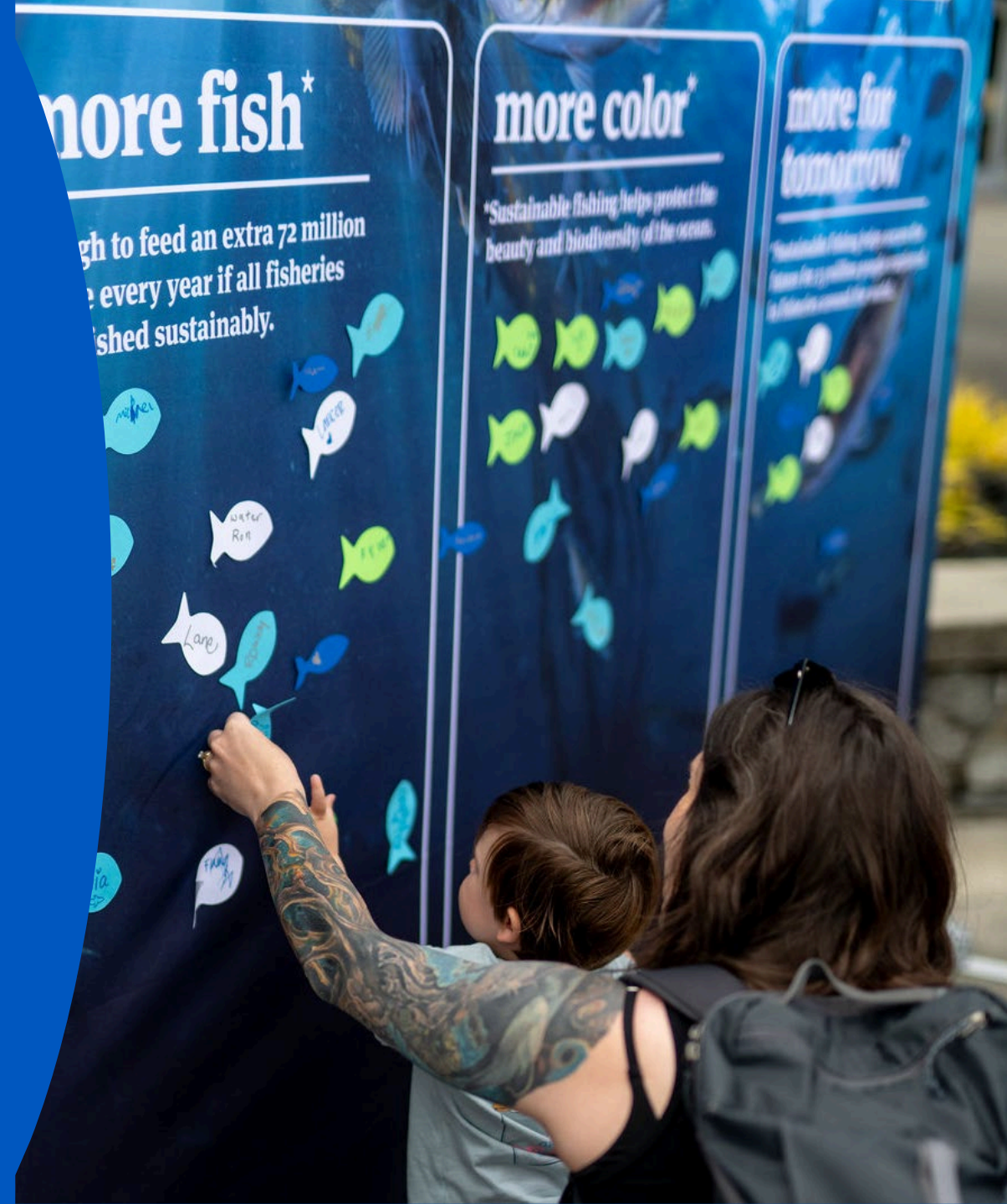


Q96. Which one of the following would most make you trust information from products or brands about how environmentally friendly they are?



Marine
Stewardship
Council

MSC and the Seafood System

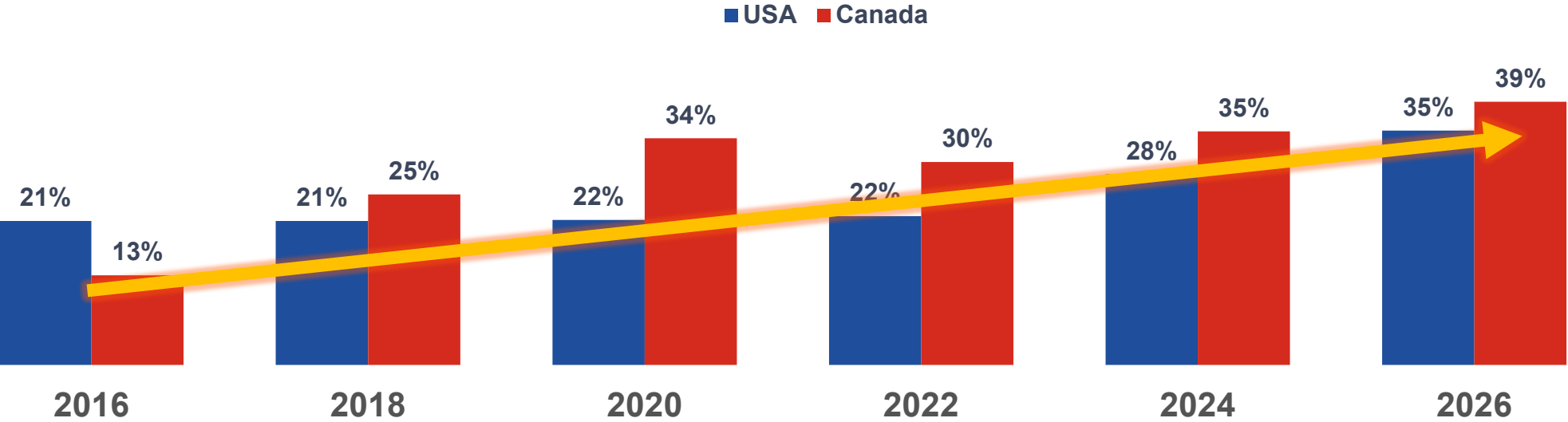


MSC label recognition has grown steadily over the decade in Canada and the USA

Have seen the MSC label, consumers in Canada and the USA, 2016–2026



Have seen the MSC label “often” or “occasionally”

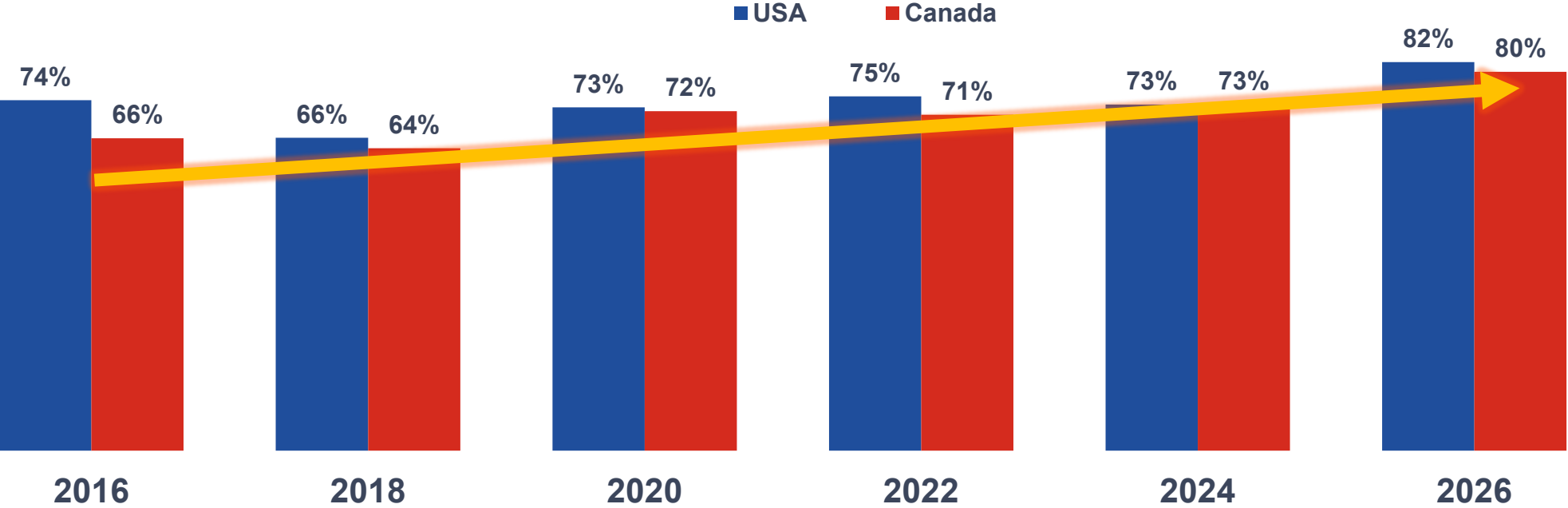


Steady increase in trust in MSC over time

Trust in the MSC label, MSC-aware in Canada and the USA, 2016–2026



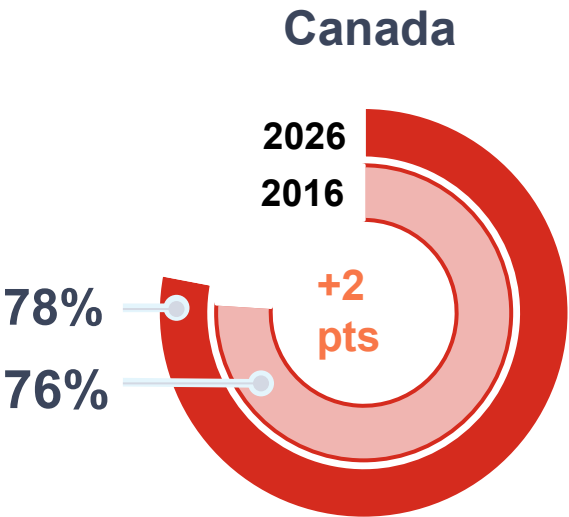
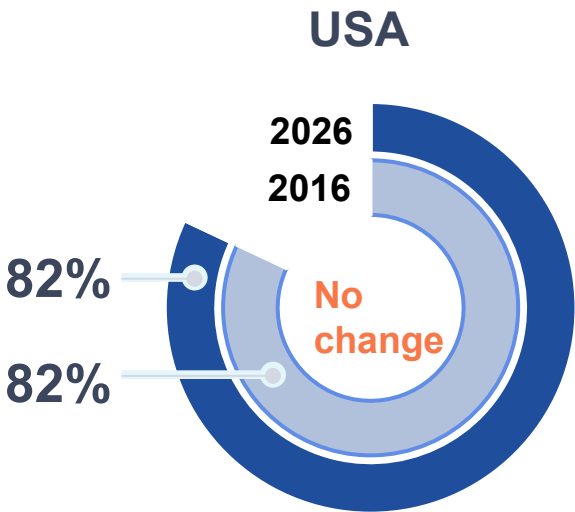
Trust in the MSC label



Recognition of MSC's strict standards has been consistent over the past decade

Describes MSC (5+6+7 on a 7-point scale), seafood consumers in Canada and the USA, 2016–2026

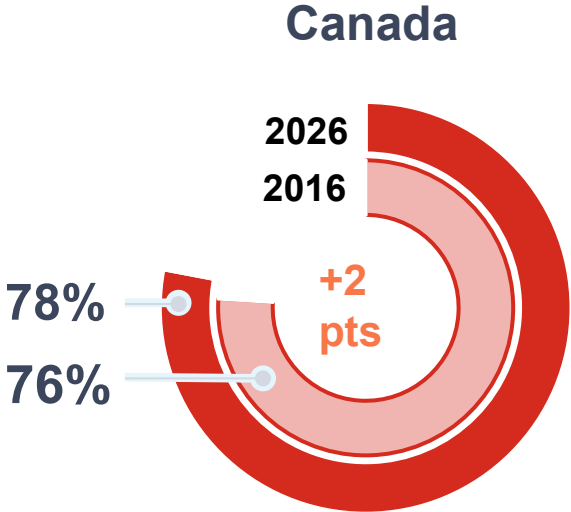
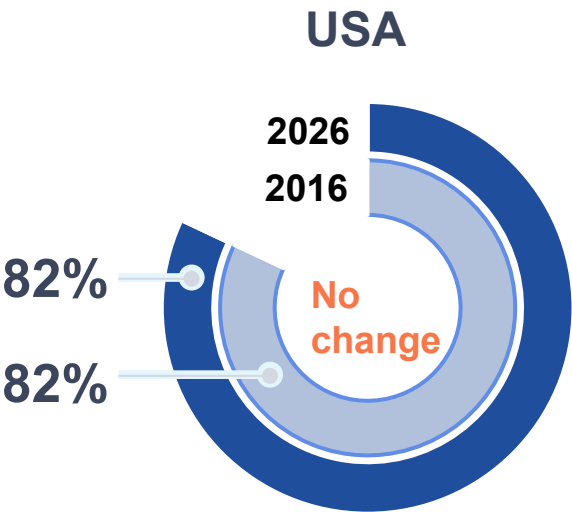
Uses strict assessment and certification standards



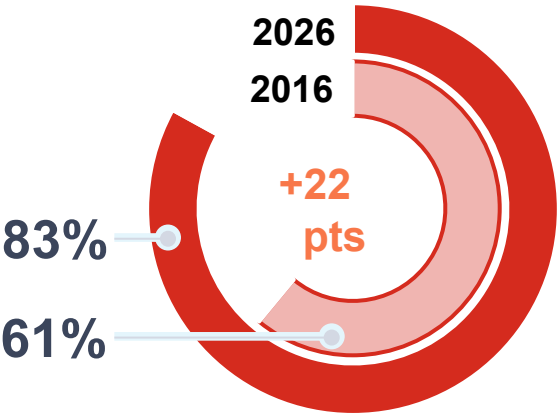
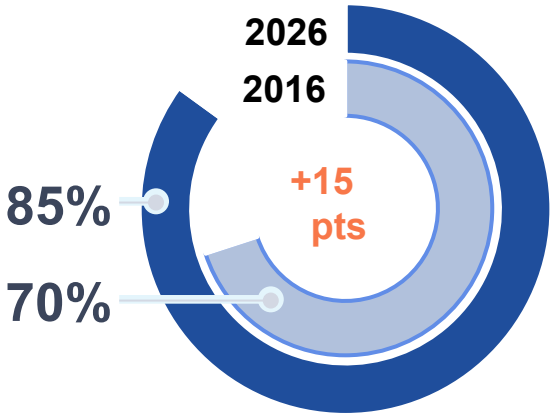
And recognition of the MSC's ocean-awareness efforts jumped rose dramatically

Describes MSC (5+6+7 on a 7-point scale), seafood consumers in Canada and the USA, 2016–2026

Uses strict assessment and certification standards



Raises awareness of ocean issues

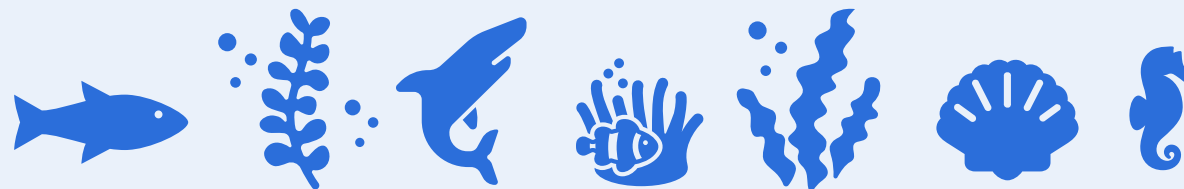


Q11_1_1. How well do you think each of the following statements describes the Marine Stewardship Council (MSC) and the ecolabel?

For consumers today, the MSC label signals ocean protections and seafood traceability

Seafood consumers in Canada and the USA, multi-select, top five ranked items shown, 2026

39% Helps protect the oceans



28% Traceable to its source

24% Reassures me about where it comes from

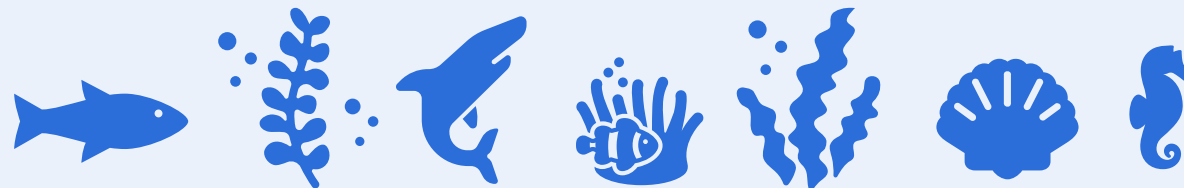
22% Gives me better understanding of how it was caught

22% Wild-caught from the ocean

Many also associate health and quality benefits with the MSC label

Seafood consumers in Canada and the USA, multi-select, top five ranked items shown, 2026

39% Helps protect the oceans



30% Higher quality product

28% Healthier for me

28% Traceable to its source

27% Natural

24% Reassures me about where it comes from

22% Gives me better understanding of how it was caught

22% Wild-caught from the ocean

Ocean sustainability drivers

Conventional purchase drivers



What We Heard



Five trends a decade of tracking tells us

1

Consumer intent keeps climbing

Demand for verified sustainability has risen on every measure since 2016

2

The demand is specific: proof, not promises

Shoppers want claims independently verified, not self-declared

3

Trust in companies is the bottleneck

Belief in company claims lags behind consumer intent

4

Industry is gaining credit but still falls short of expectations

Perceived progress is improving, expectations are rising faster

5

Ecolabels like the MSC are proof points to close the gap

Recognition and trust in the label both keep growing



SEE THE LABEL. KNOW YOU'RE GOOD.

Preview of MSC Earth Month Campaign

Launching April 2027



TODAY'S CONSCIOUS CONSUMER

They like to make intentional choices that reflect their values and identity. They are always looking to be a little bit better, whether that's healthier, more knowledgeable, or more sustainable.

How they're the same:

- Always want to be better
- Values drive their actions
- Seek balance
- Link sustainability & health cues

How they've changed:

- **More pragmatic**, less aspirational
- Small everyday choices vs. global impact
- **Less trusting**, more skeptical
- Need **clarity over complexity** (high mental load)
- Connection to local community



BEYOND PRICE, SHOPPERS ARE LOOKING FOR STRONGER VALUES BUNDLES IN THE GROCERY AISLE...

They look for:

- ✓ Quality
- ✓ Taste
- ✓ Health
- ✓ Price

And in a trust-fractured world, they vet with:

- ✓ Brand
- ✓ Familiar Claims
- ✓ **Eco-Labels**

OUR WAY IN...

EMOTIONAL

A simple, no-regrets
decision that lets them
shop with confidence.



CULTURAL

Clarity you can trust.



FUNCTIONAL

Wild-caught, backed by
hard standards and
oversight.

OUR WAY IN...

SEE THE LABEL.
KNOW YOU'RE GOOD.



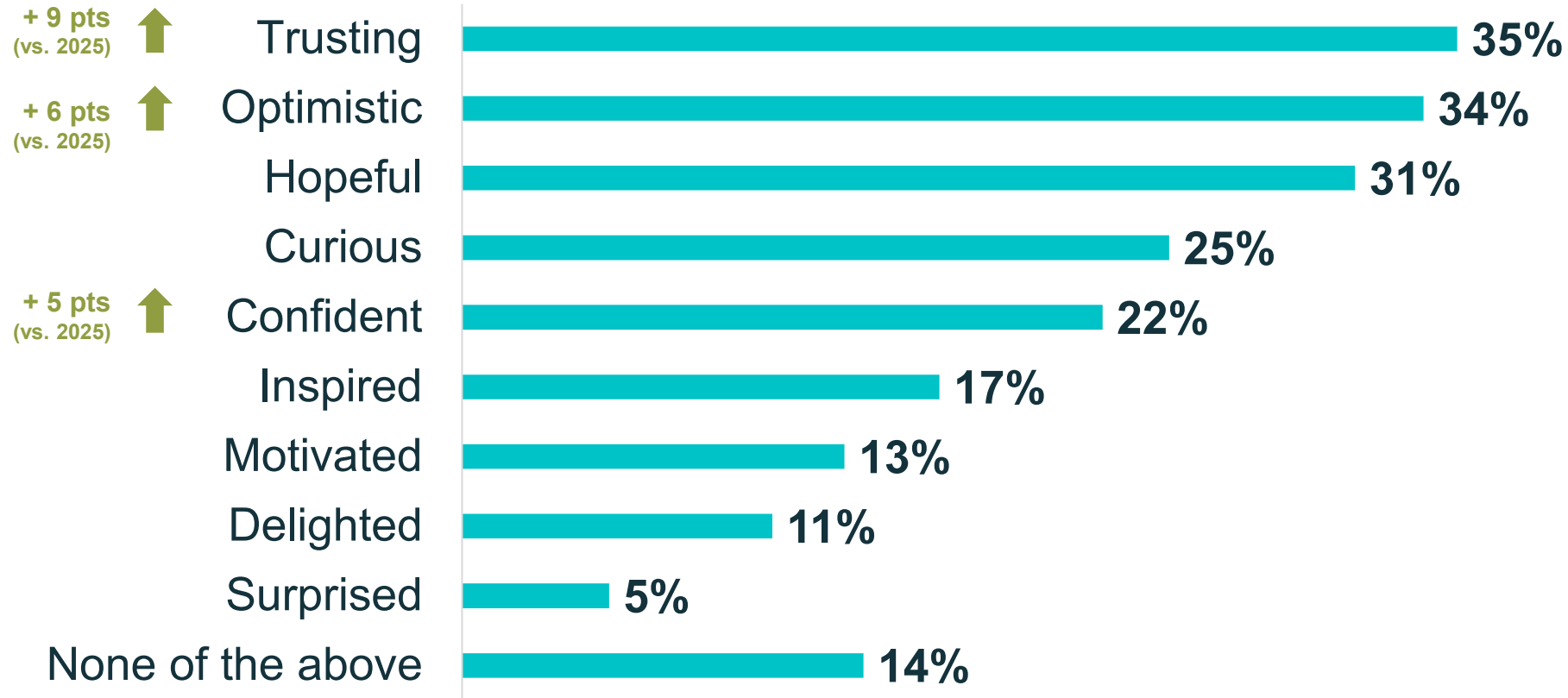
For a
healthier
ocean.



msc.org



CAMPAIGNS WITH IMPACT



Emotions with values
<4% not shown

Fearful
Sad
Disgusted
Angry
Confused
Distrustful

JOIN US



JANES | **MSC**

All of Janes® fish products are MSC-certified!

mscbluefish and 3 others

View shop

257 863 17 204

Liked by jackieangelinamarks and others

freshmeals *CLOSED... more

April 20

nicecans and 2 others

mackeythehepsy • Original audio

nicecans It all started when @chefcharlottelangley met the @mscbluefish and the most boldly delicious sustainable canned food brand was born!

A match made perfect for #earthday

Which is everyday in our world!

23w

MSC

www.msc.org

chickenoftheseaofficial and mscbluefish

SEE THE LABEL. KNOW YOU'RE GOOD.

Chicken of the Sea

MSC

Wild, certified sustainable seafood

18 2

Liked by mscbluefish and others

chickenoftheseaofficial Happy Earth Day! We are... more

April 22



LOOK FOR THE MSC LABEL.

CLOVER LEAF

MSC

Wild, certified sustainable seafood

When you see the @MSCbluefish label on our products, it means the seafood is wild-caught and independently verified as environmentally sustainable by the Marine Stewardship Council.

Sustainably sourced

Responsibly sourced ingredients, better for communities and the planet.

Walmart

Sustainably sourced seafood

MSC

Sustainably wild-caught fish — protects fish stocks and ocean ecosystems.

BAP

Responsibly farmed seafood — focuses on animal welfare, environment and food safety.



JOIN US

2027



Sign up for MSC
consumer toolkits
& insights



April

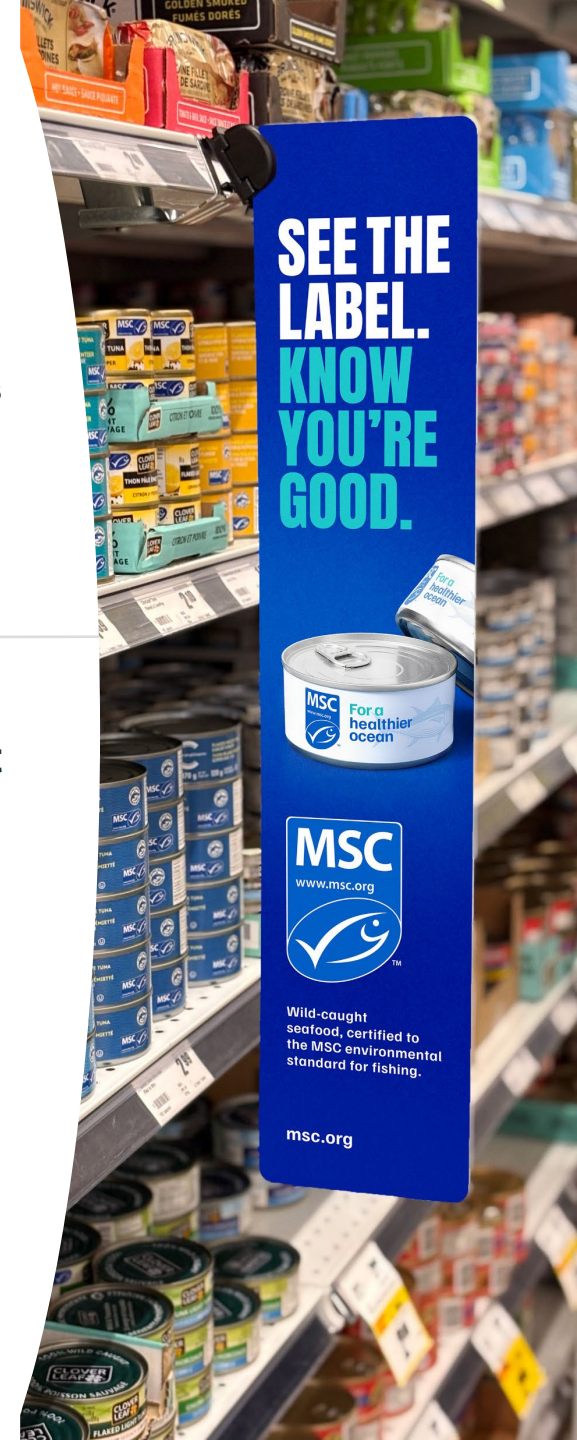
**MSC Campaign
launch for
Earth Month!**

June

**World Ocean Day
– Global MSC
Campaign**

Oct

**MSC National
Seafood Month
Campaign**



**SEE THE
LABEL.
KNOW
YOU'RE
GOOD.**



Wild-caught
seafood, certified to
the MSC environmental
standard for fishing.

msc.org

Q/A



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THANK YOU FOR YOUR TIME!



Sign up for MSC
consumer toolkits
& insights

