Safeguarding ocean resources through market demand

Marine Stewardship Council
Markets increasingly demanding sustainability

- Securing long-term supplies.
- Answer to consumer demand.
- Offset e-NGO pressure.
- Part of overall CSR Strategy.
- Manage risk and reputation.
- Demonstrate leadership and vision.
- Marketing and Sales Opportunities.
- Bottom Line: Sustainability PAYS!

*Standards and credible certification, ecolabels, play a fundamental role in an increasing number of markets*
Five key principles of the MSC Chain of Custody Standard

1. Principle 1: Purchasing from a certified supplier
2. Principle 2: Certified products are identifiable
3. Principle 3: Certified products are segregated
4. Principle 4: Traceable and volumes are recorded
5. Principle 5: The organisation has a management system
Market leaders

Global business commitments
“The origin of our products is extremely important to us. Sustainable fisheries play an essential role in our purchasing policy. We definitely want to make sure that there’s not only fish for today, but that we can also offer a broad fish assortment to our customers in the future. We are proud that today most of our seafood range already bears the MSC label.”

Jan Bock, Director Purchasing at Lidl Germany
China: Online seafood market*

25 million customers in 2015
sales value CNY 10 billion
(US$1.58bn)

55 million customers in 2017
sales value CNY 50 billion
(US$7.89bn)

*Tmall
“McDonald’s collaboration with the Marine Stewardship Council is a critical part of our company’s journey to advance positive environmental and economic practices in our supply chain.”

Dan Gorsky, senior vice president of U.S. supply chain and sustainability
“Our commitment extends beyond sourcing policies and aims not only to educate, but also ingrain this perspective. We must position ocean sustainability as the ‘norm’ and only option moving forward.”

Graham Dugdale, Executive Commercial Director, John West Australia
“Seafood is a popular choice with our guests, and it’s critical that we include sustainable fishing practices in our sourcing strategy if it is to remain available in the future.”

Maxime Verstraete, vice president, corporate responsibility, Hilton Worldwide
Global commercial commitments & progress

In key European markets like Germany, Austria, Great Britain, Netherlands and Belgium we have achieved 100% MSC certification for all our own brand fresh and frozen fish products which are permanently listed. We will continue to increase the amount of MSC certified products in all our markets until 2020 and beyond.

Carrefour wants to offer the largest range of sustainable seafood on the market by 2022 and has set up the target to sell globally one fish out of two from sustainable sources by 2020.

Since 2016, our range of MSC-ecolabelled products has increased from 16 to over 130, and we were proud to be named MSC Newcomer of the Year in 2016, and awarded Fish Counter of the Year in 2017 - we sell MSC-certified fish on all of our 600+ fish counters across the UK.

200+ new MSC products launched this year

237 hypermarket Fish counters certified

Over 180 MSC products worldwide
MSC market growth
Supply chain participation

Full supply chain assurance
Tracebacks and DNA testing
Digital traceability pilot projects
Consumer market growth

• Global MSC sales of £5bn annually
  – + 30% yearly growth

• Over 1000 retail brands worldwide

• 25,000 restaurant outlets globally

• Polish market
  – Tripled over last 12 months
  – Brand participation doubled

• Central European market
  – 20% year-on-year market growth
The market

29,000 products in 108 countries now carry the MSC label

860,000 tonnes

20% growth

Global sum of products available in individual countries

2008 2010 2012 2014 2016 2018

0 5000 10000 15000 20000 25000 30000

28724
MSC market growth by country

Year on year volume growth in all markets

Chart showing the volume of MSC labelled seafood by country for different years.
Growth of MSC by species & category

109 different MSC species sold worldwide

MSC products in growing categories
MSC growth in Central and Eastern Europe
Recognising and rewarding leadership
Retailers ranking in UK

Certified sustainable seafood

January 2015

January 2018
Future strategic focus

• Fishery Retention
• Pathways towards certification
• Species Strategies
  • Crab,
  • squid,
  • octopus,
  • seaweed,
  • reduction fisheries,
  • tuna
• Impact Mapping
• Supply chain risk management
On **Wednesday 15th August**, the MSC opens the final consultation on the revised CoC Standards and certification requirements.

The consultation is open for 60 days, until **15th October 2018**.

The CoC Standards are reviewed every 3-5 years to ensure they are relevant and effective.

The review considers issues raised by stakeholders and developments in the supply chain industry.
How the MSC works with fisheries, suppliers and retailers to encourage a more sustainable seafood market

Fisheries which meet the MSC standard are independently certified as sustainable

Retailers and restaurants choose MSC certified sustainable seafood

A traceable supply chain assures consumers that only seafood from an MSC certified fishery is sold with the MSC ecolabel

Consumers preferentially purchase seafood with the MSC ecolabel

Market demand for MSC certified seafood increases

More fisheries choose to improve their practices and volunteer to be assessed against the MSC standard