



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



MSC Chain of Custody Standard



Principle 1:
Purchasing from a certified supplier



Principle 2:
Certified products are identifiable



Principle 3:
Certified products are segregated



Principle 4:
Traceable and volumes are recorded



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

The poster is blue with white text and features silhouettes of fish. The text reads: "LE POISSON DURABLE DE LIDL POUR TOUS CEUX QUI COMPTENT DE DUURZAME VIS VAN LIDL VOOR IEDEREEN DIE TELT". At the bottom, in a yellow banner, it says: "Participez à la Semaine Consciente du Poisson! Doe mee met de Bewuste Visweek!".



MSC可持续渔场寻鲜之旅

可持续海鲜 从渔场到餐桌全程溯源

喵鲜生携手MSC/美渔坊/獐子岛

活动时间:2016.1.11-2.10



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



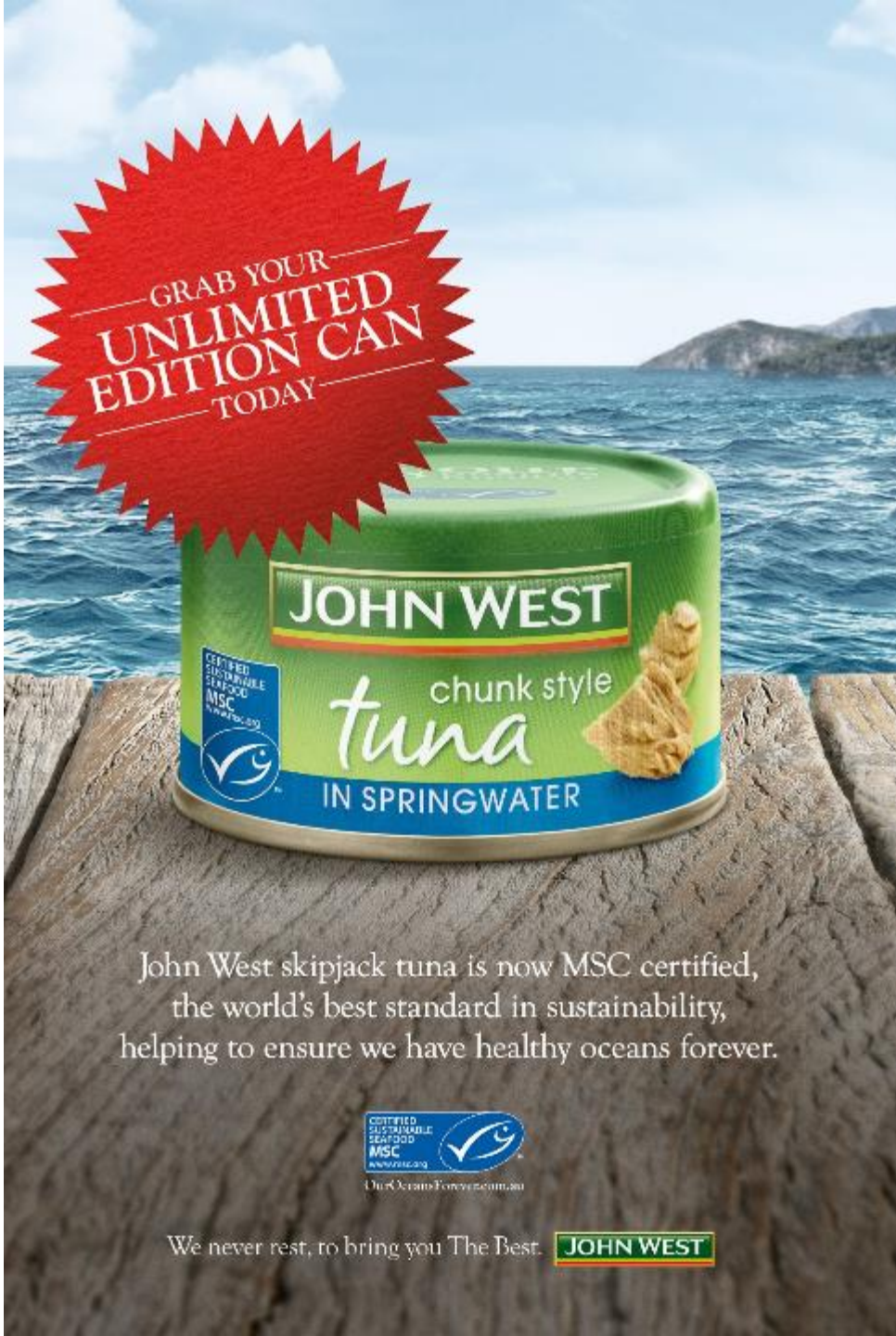
此白框暂代指MSC



"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





GRAB YOUR
UNLIMITED
EDITION CAN
TODAY

John West skipjack tuna is now MSC certified,
the world's best standard in sustainability,
helping to ensure we have healthy oceans forever.



We never rest, to bring you The Best. **JOHN WEST**

“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."

200+ new MSC products launched this year



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.

237 hypermarket Fish counters certified



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.

Over 180 MSC products worldwide



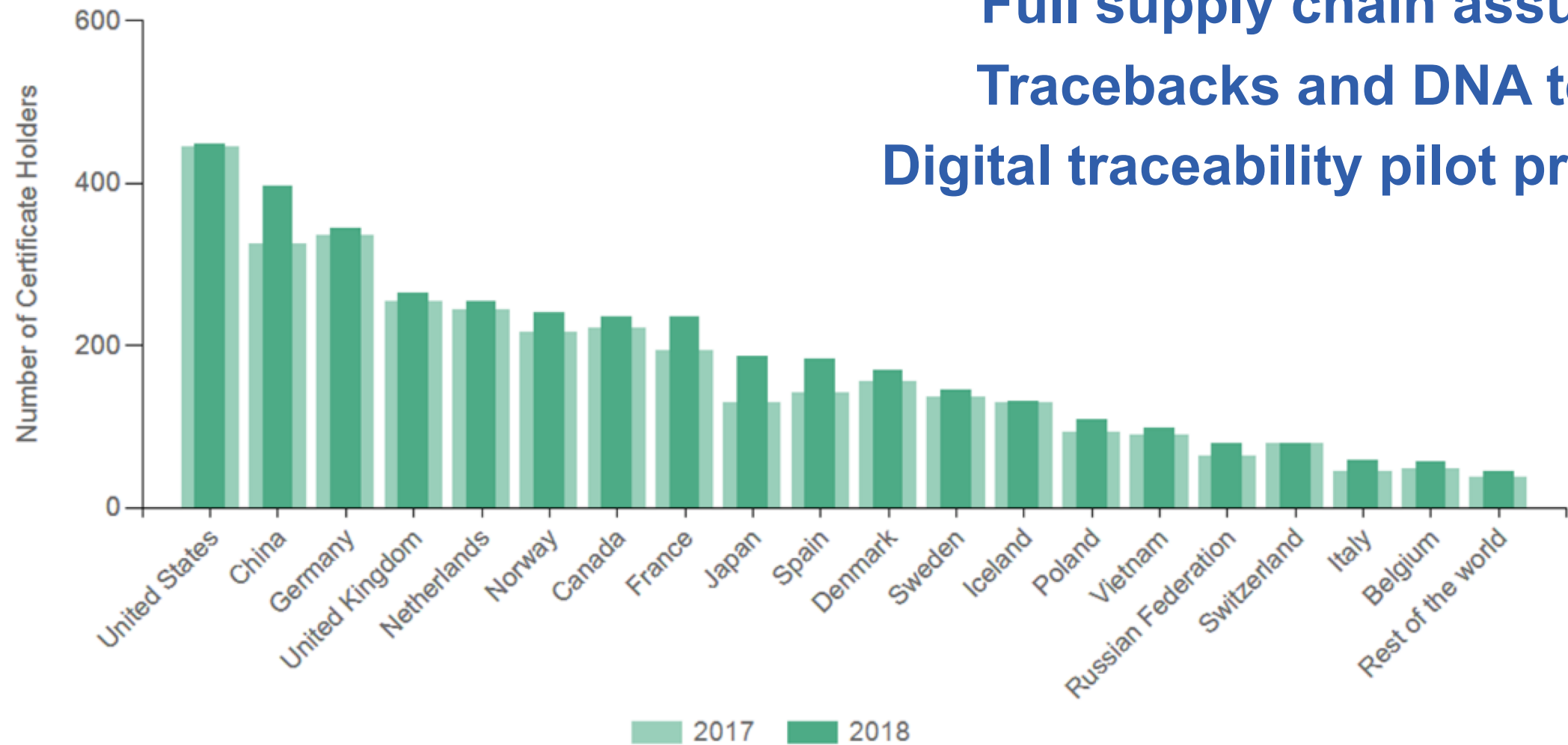
MSC market growth



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

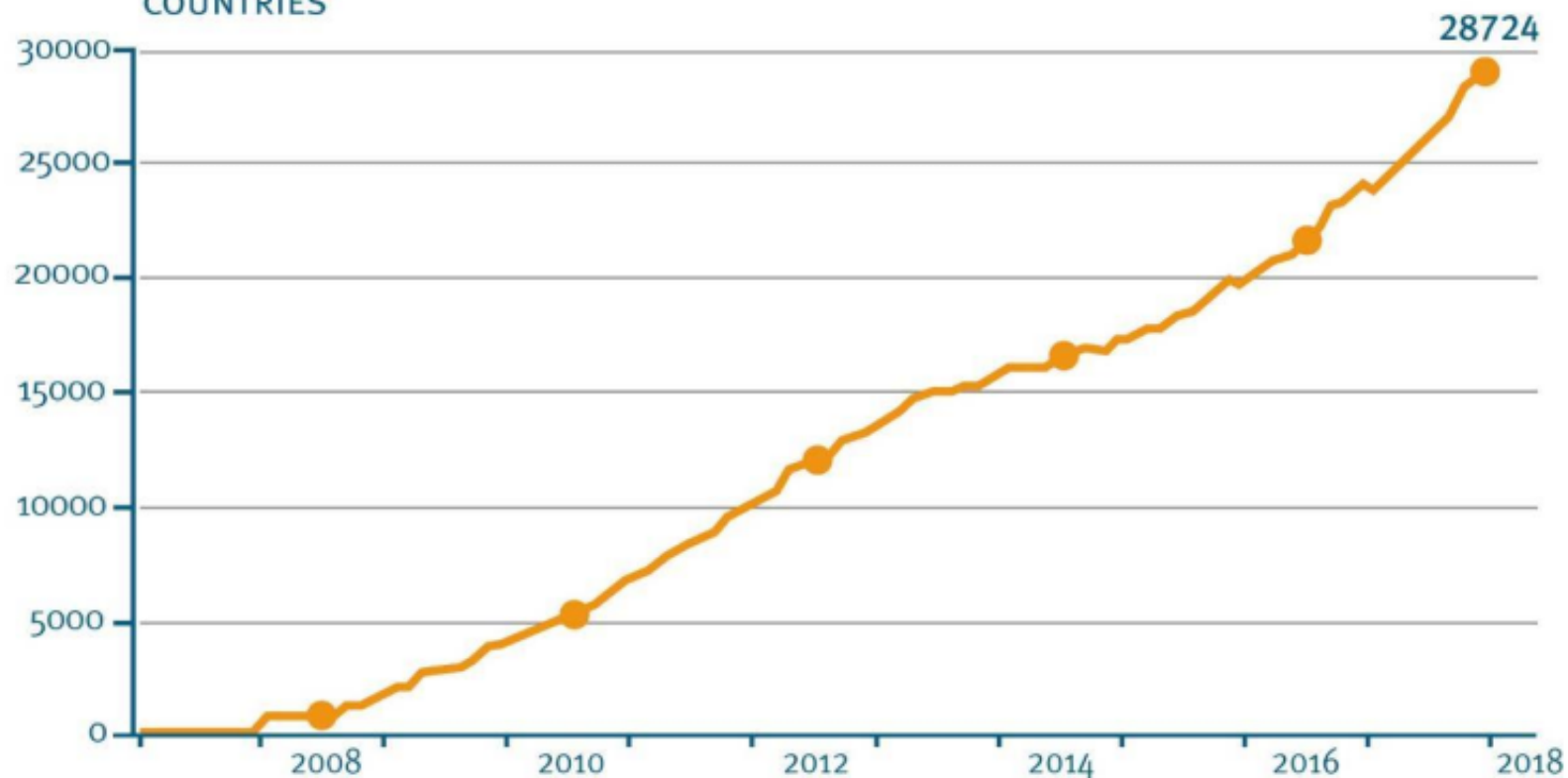
29,000 PRODUCTS IN **108 COUNTRIES**

now carry the MSC label

860,000 TONNES

20% GROWTH

GLOBAL SUM OF PRODUCTS AVAILABLE IN INDIVIDUAL COUNTRIES

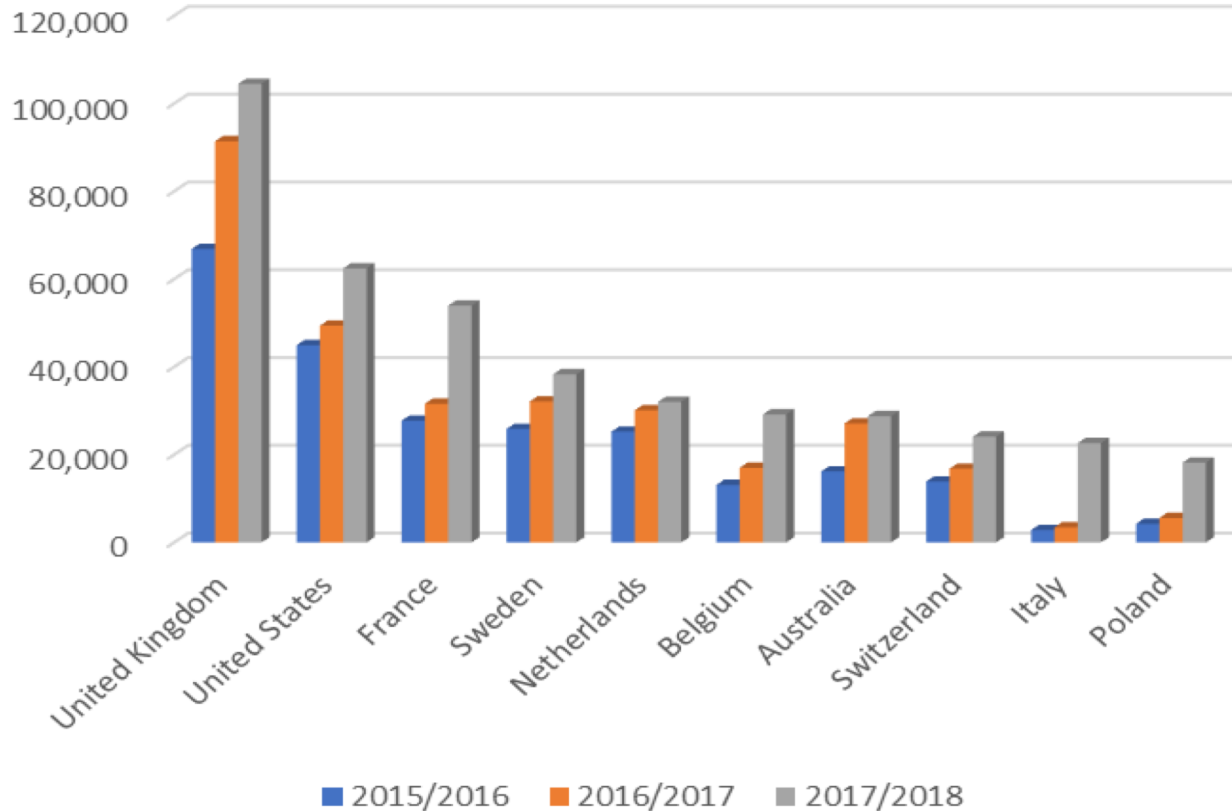


MSC market growth by country

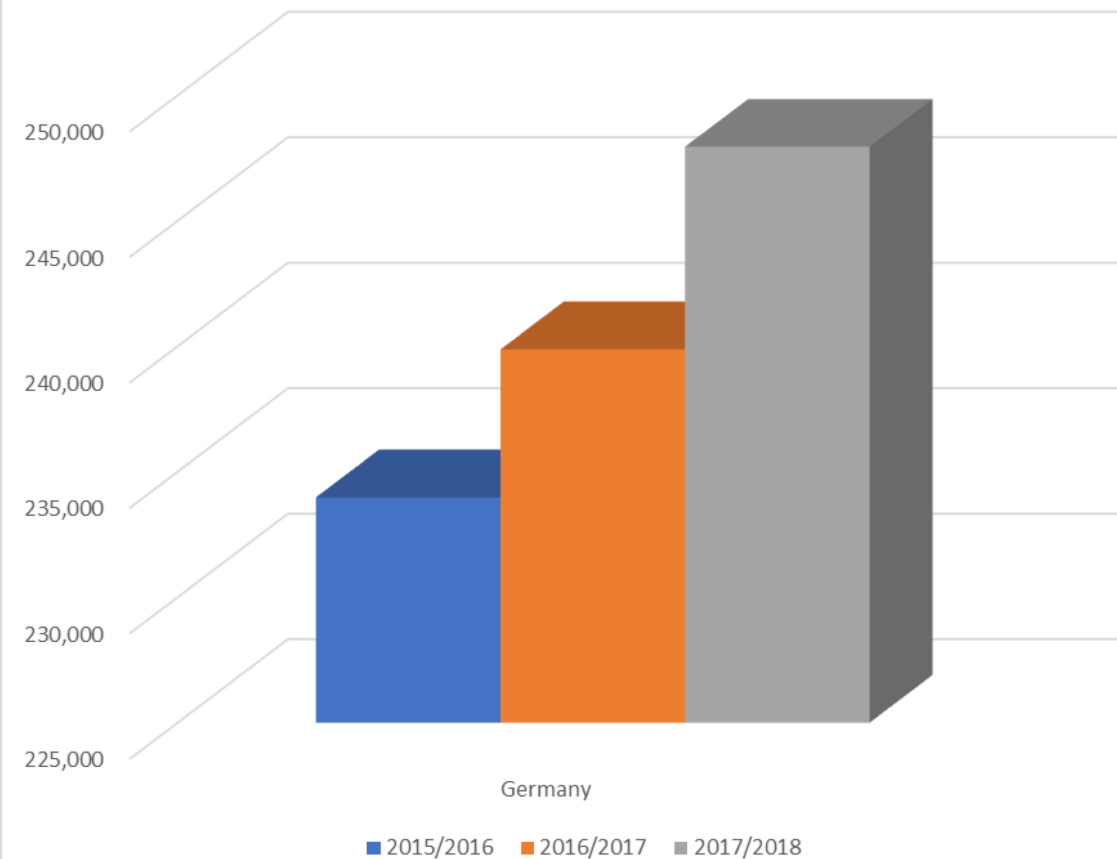


Year on year volume growth in all markets

volume of MSC labelled seafood



volume of MSC labelled seafood



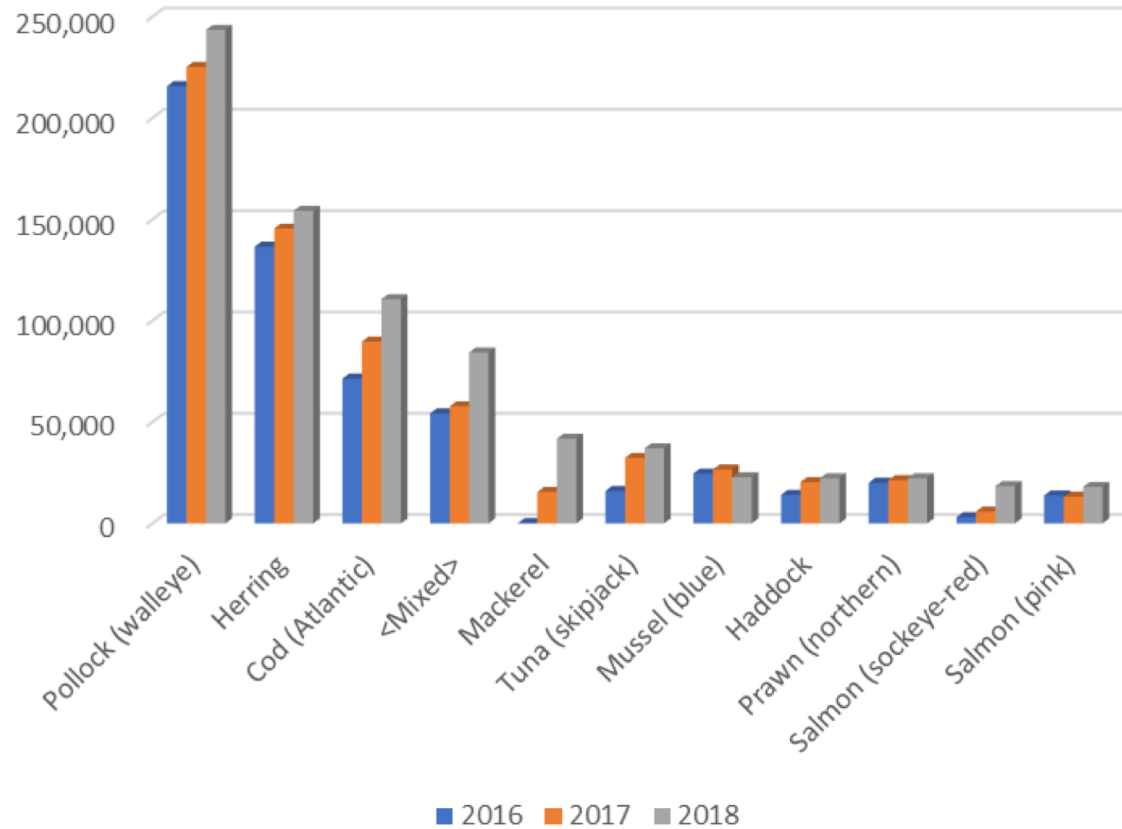
Growth of MSC by species & category



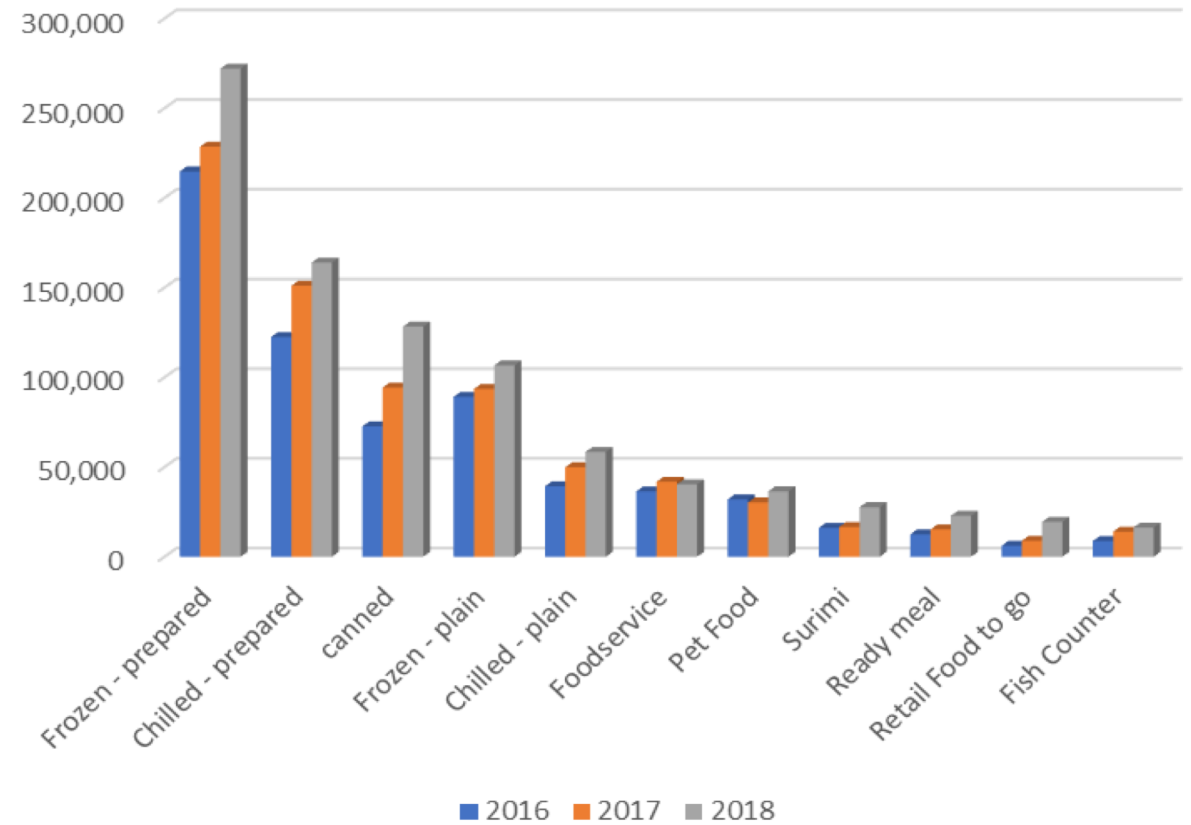
109 different MSC species sold worldwide

MSC products in growing categories

MSC products by species



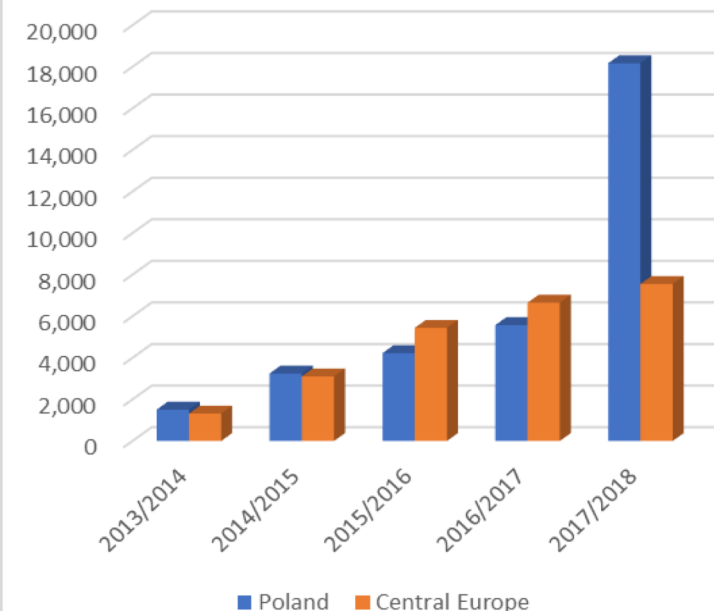
MSC products by category



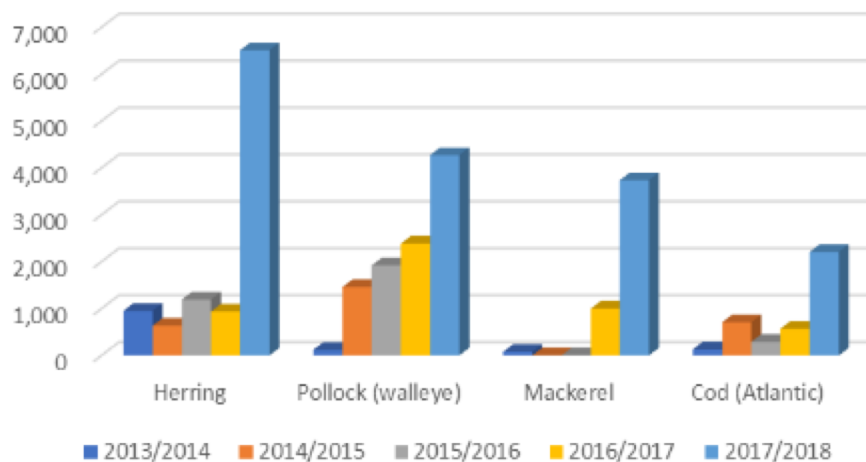
MSC growth in Central and Eastern Europe



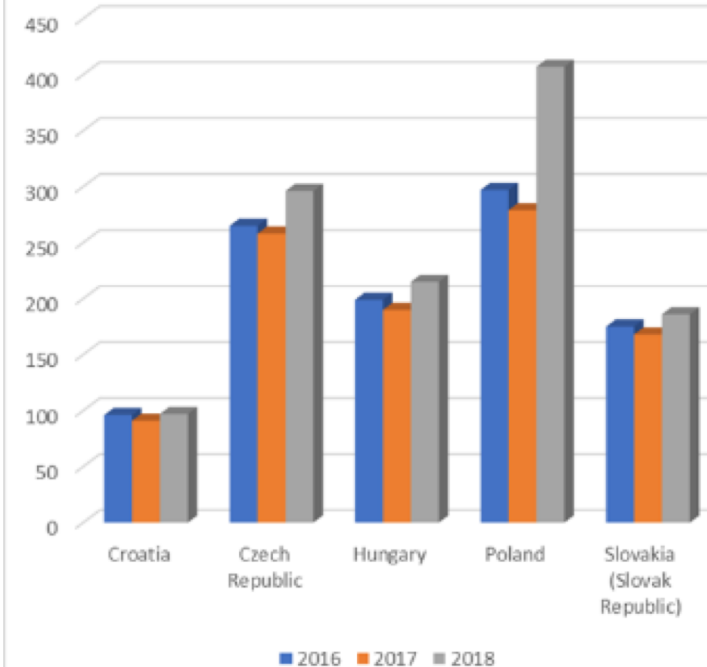
Volume of MSC labelled products (MT)



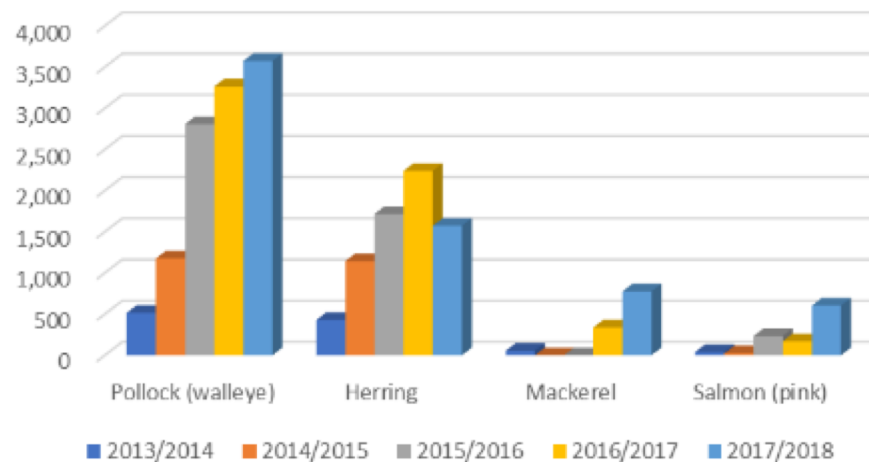
Polish MSC products by species



MSC labelled products in central Europe



Central Europe MSC products by species



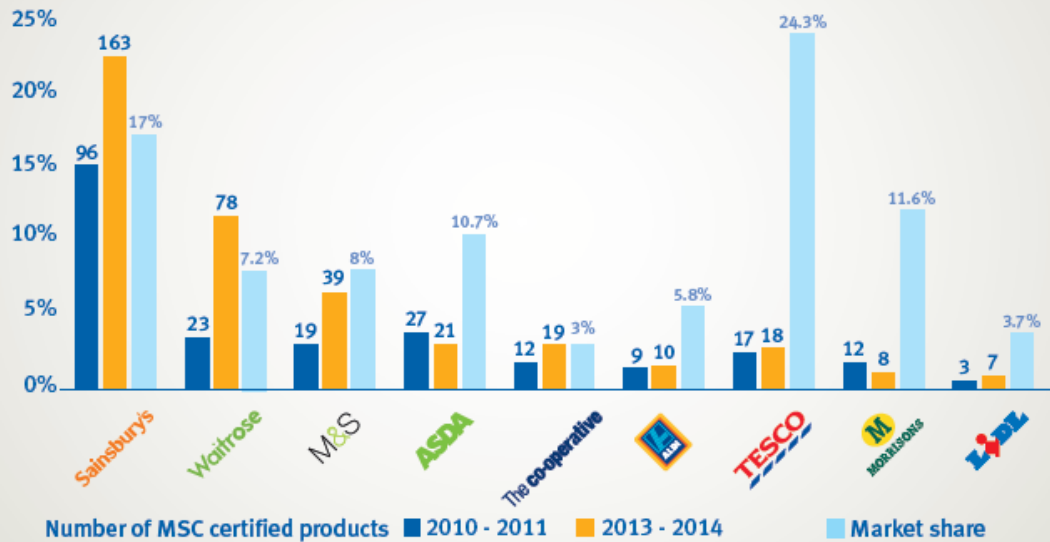
Recognising and rewarding leadership



Retailers ranking in UK



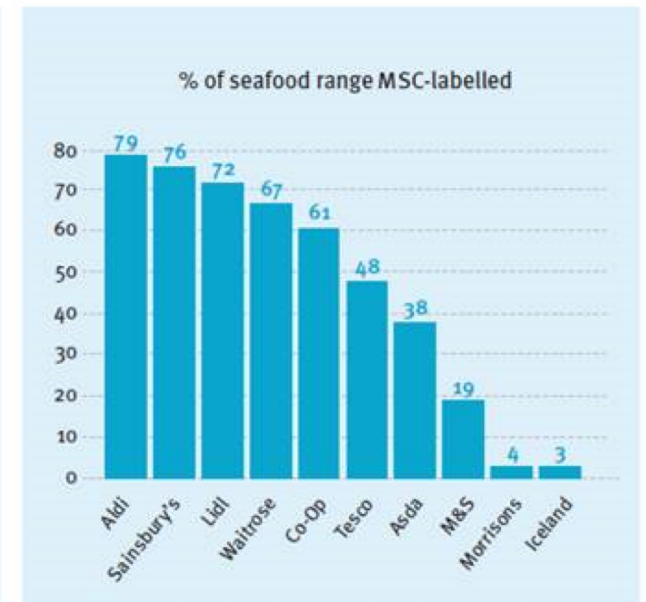
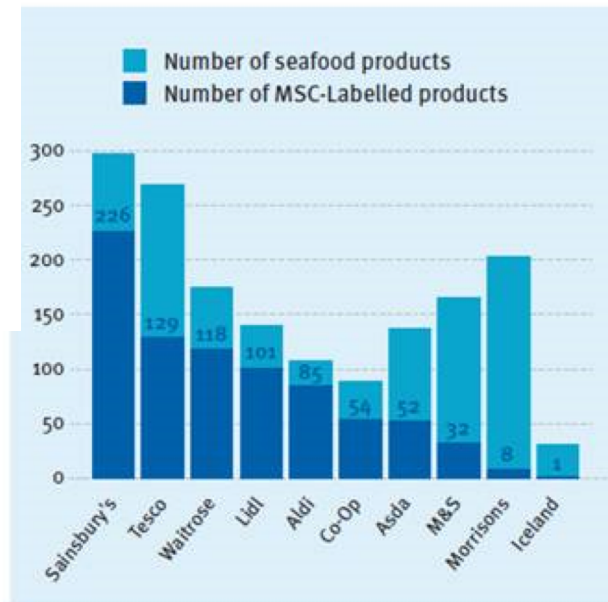
Certified sustainable seafood



Marine Stewardship Council/Nielsen HomeScan 2014

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.

