



***Rola polskiej branży w dokonywaniu pozytywnych zmian w ekosystemach morskich
– kluczowe gatunki dla polskiej branży***

***The role of Polish seafood business in driving positive change in marine ecosystems
- crucial species for the Polish seafood business***

**Marta Kalinowska, Erin Pridle, Camiel Derichs, Tomasz Zakrzewski , MSC
Warsaw, Poland – 7th September 2023**

**10 LAT
MSC
W POLSCE**



2013

2023

AGENDA

1. Intro MK – 10 min

- Global overview
- How certified fisheries performing
- What is the impact of the Polish industry?

2. MSC Program Development CD 10 minutes

- Ocean Stewardship Fund
- In-Transition to MSC
- MSC program in non-financial reporting

3. Let's talk about species: CD – 15 minutes

- Wild Salmon
- White Fish
- Small Pelagics
- Tuna

-> split into 4 groups discussion – 15 minutes

-> recap from the groups – 5-10 minutes (in total)

4. Q&A - 10 minutes

The largest ecosystem on Earth

83%

of the global carbon cycle is circulated through the ocean*

3 billion

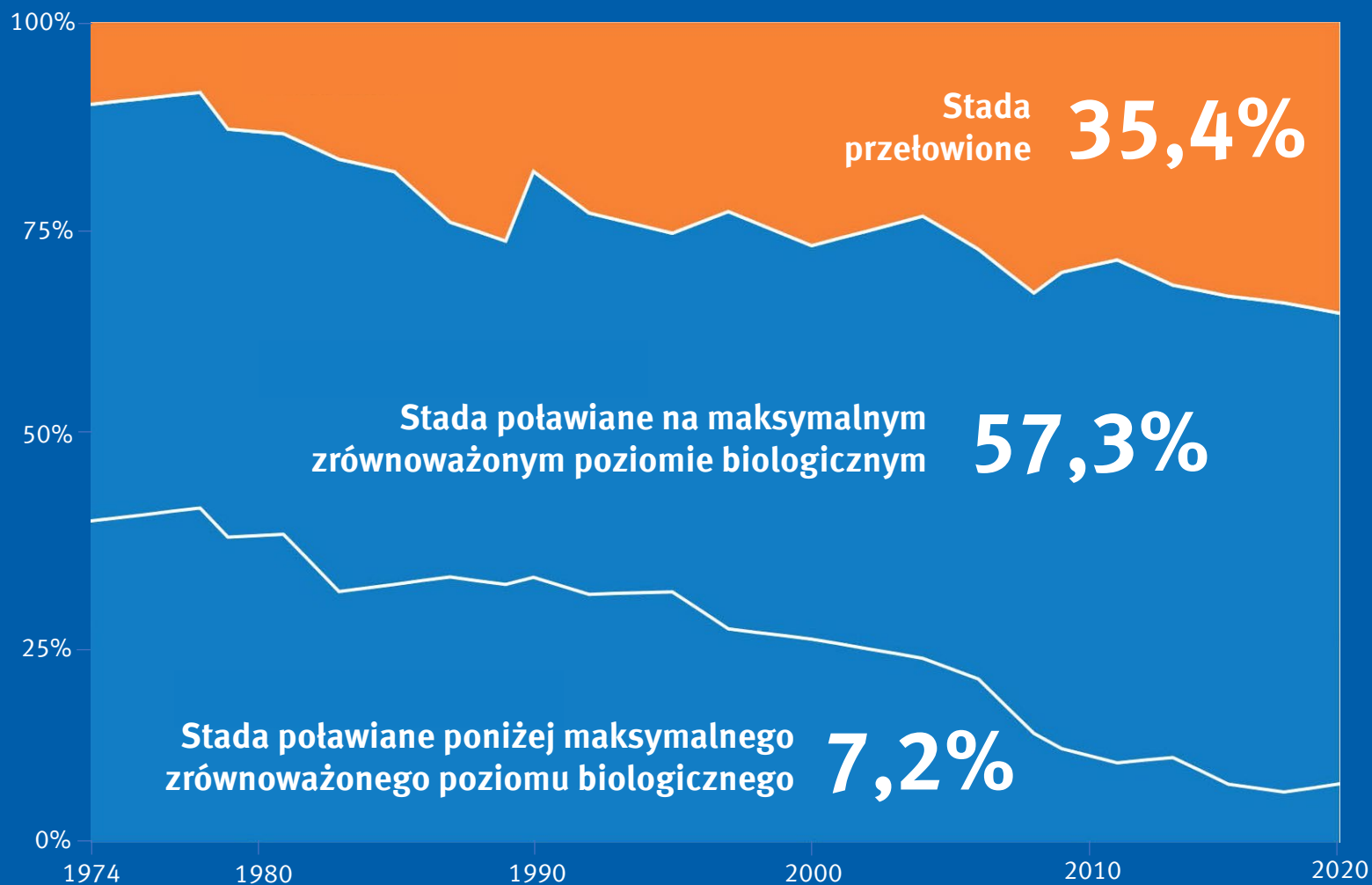
people depend on seafood for their main source of protein

600 million

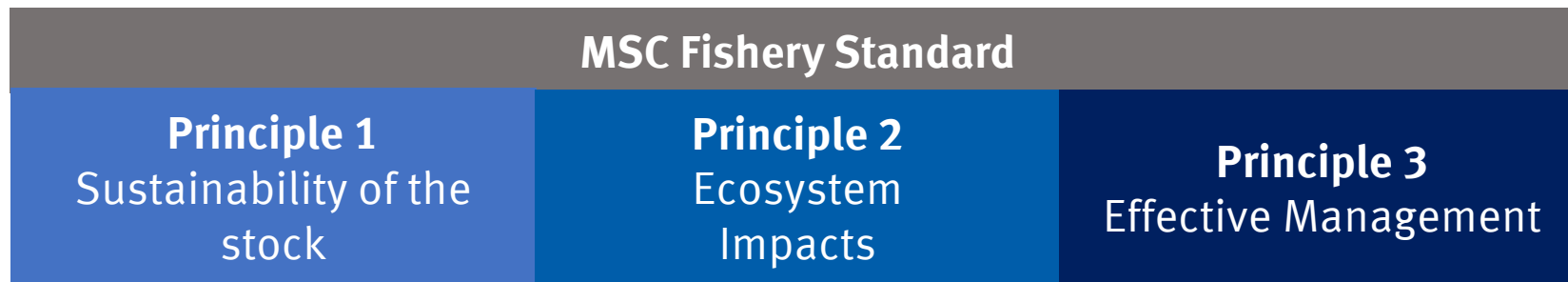
people depend on seafood for their livelihoods



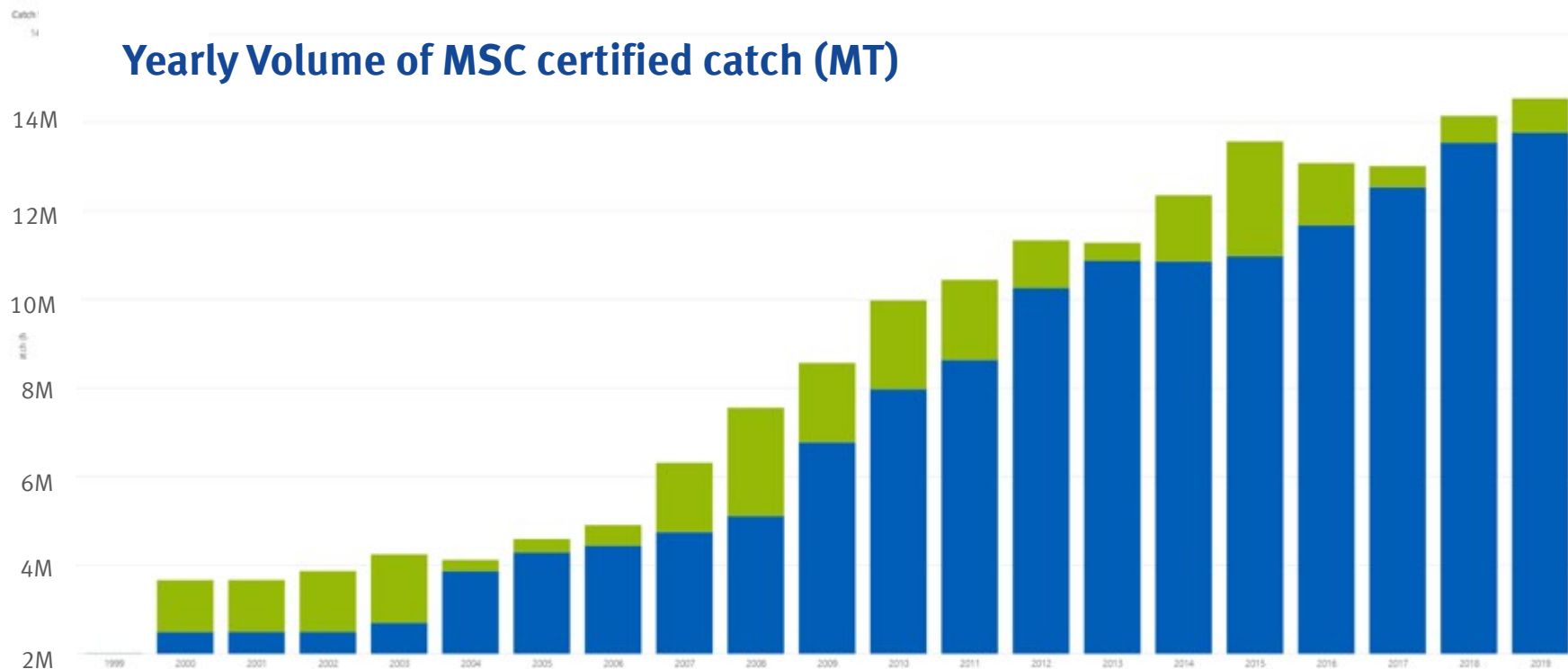
And overfishing continues



MSC Certified Fisheries



Includes 28 Sustainability indicators **Catch Status** ● Certified ● In Assessment



14.7 million
tonnes of MSC certified and in-assessment seafood

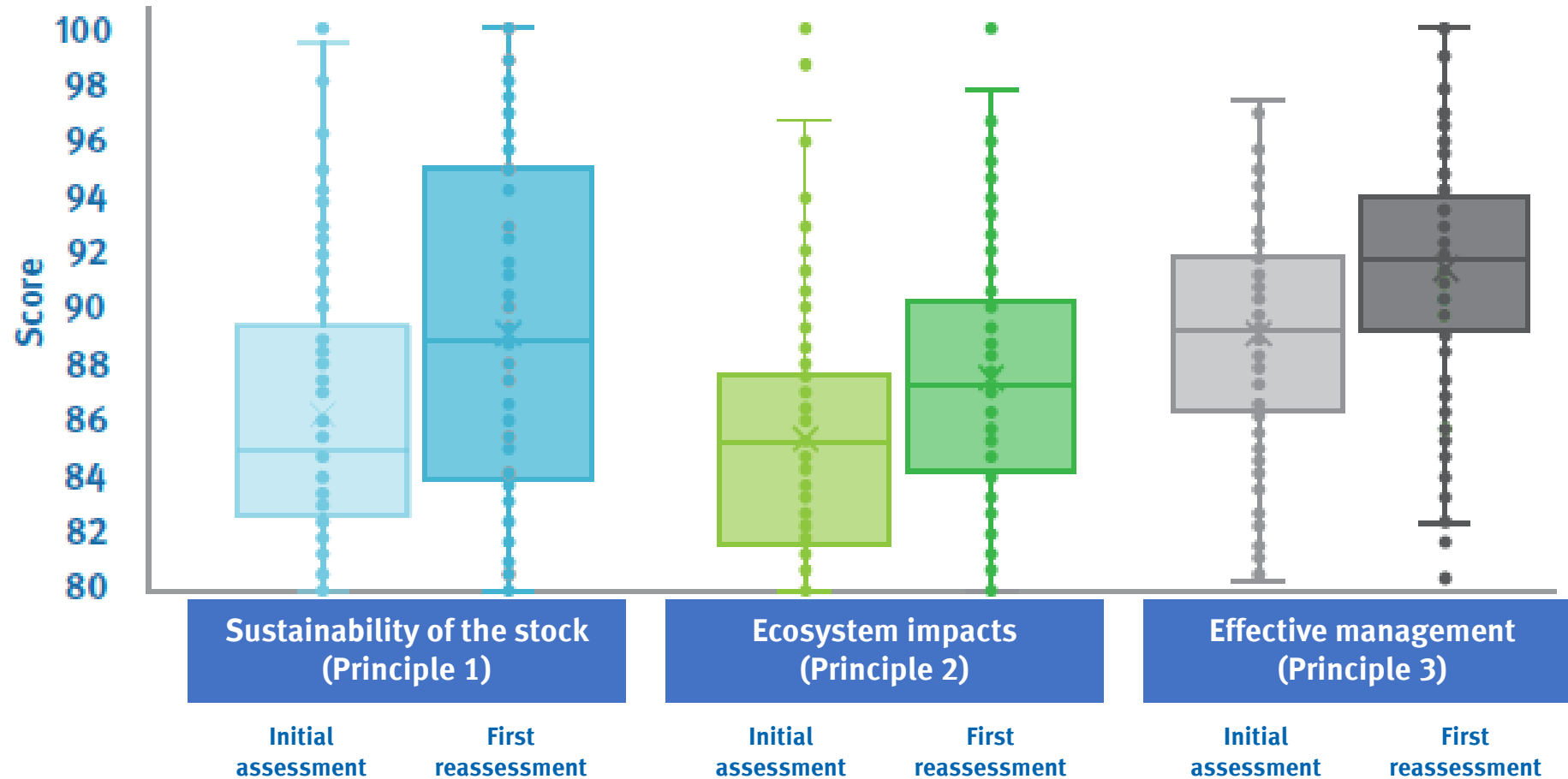
19%
of global marine catch engaged in the MSC program

670
Fisheries engaged (90 in assessment)

66
countries with MSC certified fisheries

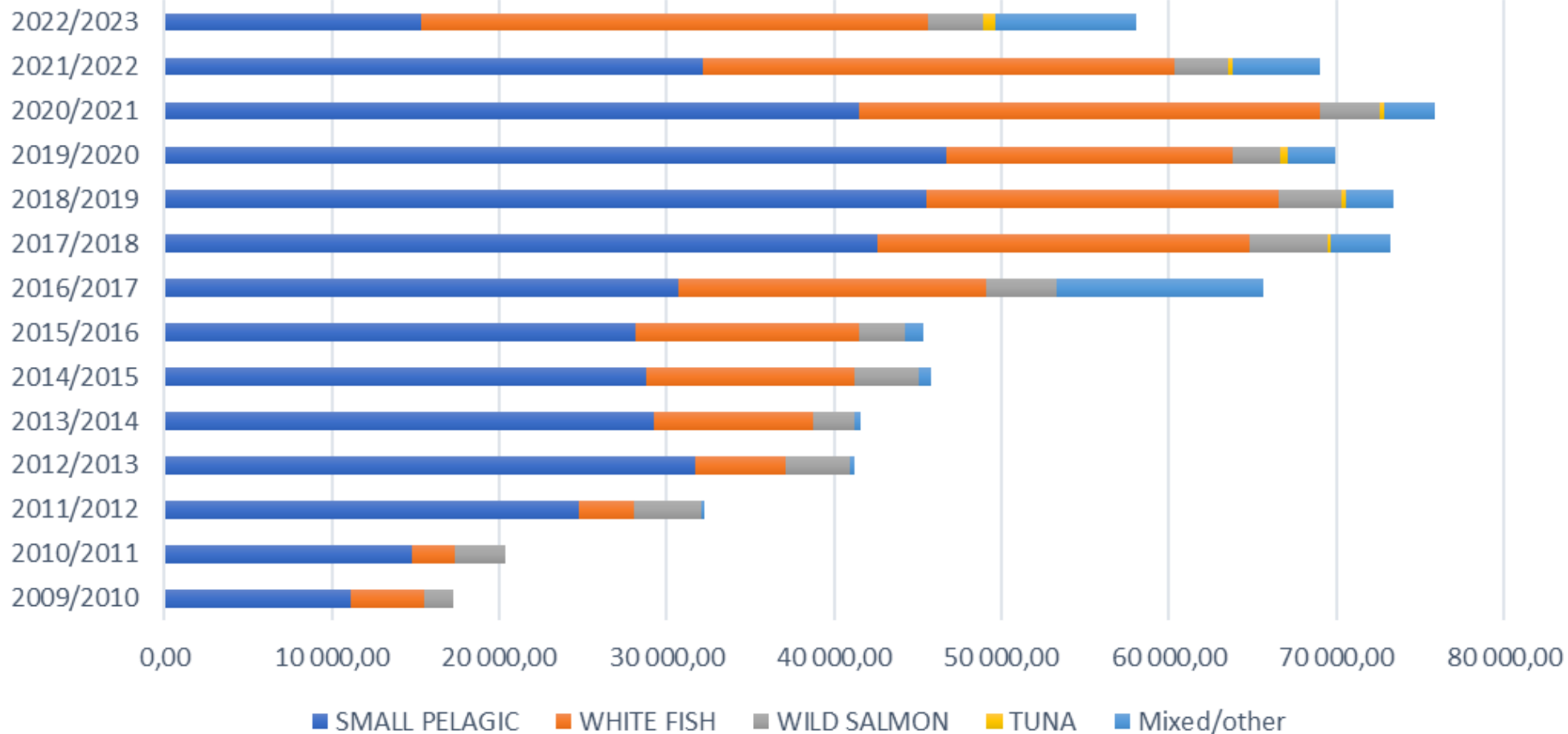
But certified fisheries improving

Conditions data is publicly available on MSC webpage. Impact reporting



And what is the impact of the Polish industry?

MSC products by Polish LH



10 years:

- 2 billion units
- 37 species
- 150 companies (CoC)
- 80 companies (LH)



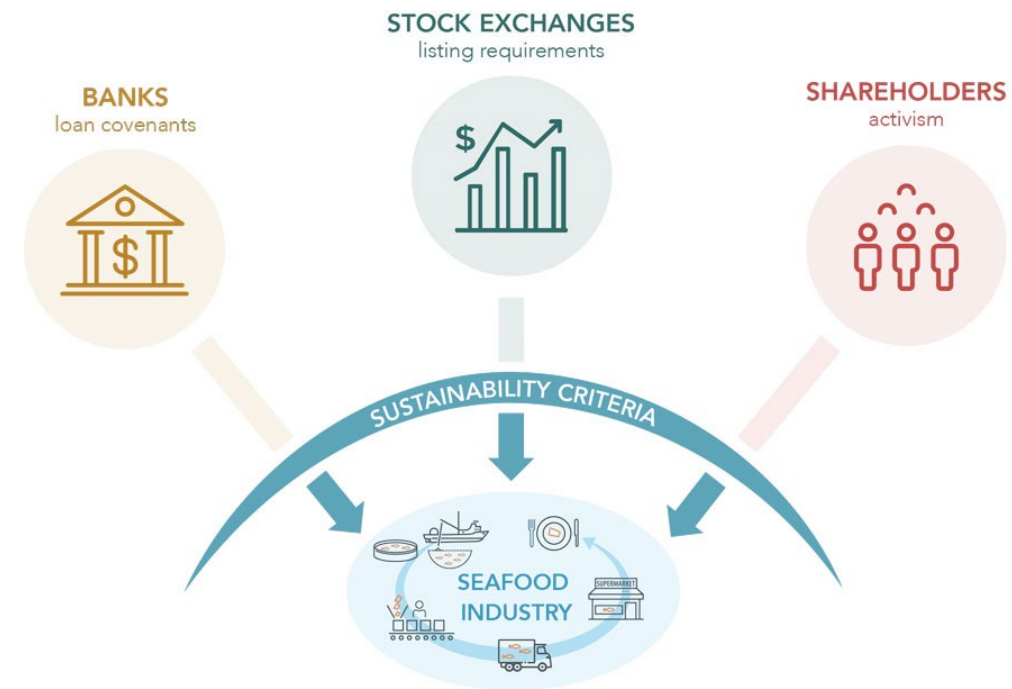
MSC Program Evolution, looking ahead

- Use of MSC in the finance sector, why/how?
- MSC supporting and recognizing improvement
 - Transition program (ITM)
 - Ocean Stewardship Fund (OSF)
- MSC supporting credible documentation and disclosure of GHGe in fisheries?

FINANCE SECTOR NEEDS CREDIBLE GLOBAL STANDARDS



- **MSC offers a recognized credible global approach:** standards and assurance mechanisms with information tools that the finance sector is using.
- **Tools available:** Webportal, Impact reporting, Ocean Stewardship Fund (OSF), Data-metrics platform trialed (with ASC) and will progress; to support financial sector decision making and ESG performance verification and demonstration
- **Best practices emerging:** MSC-ASC inclusion in green/bluebond frameworks (ING/SMN/BBVA), Chain of Custody-based pilots to aid due diligence of banks, Sustainability Linked Loans with MSC/ASC as KPIs in loan contracts (Rabobank).



Ocean Stewardship Fund



Our **Ocean Stewardship Fund** (OSF) is dedicated to supporting fisheries committed to sustainability and fishing best practice.

The Fund offers strands for certified fisheries, as well as support to ITM fisheries:

- **Transition assistance**
Supports costs of improvements in the action plan and CAB progress verification costs.
- **Loan guarantees**
Reduce risk to lenders, helping fisheries access commercial loans to support their development, including progress towards sustainability.

Ocean Stewardship Fund

US\$2.8
million

total grants awarded

24

research projects
funded

64

projects and fisheries

40%

supporting developing
economy fisheries

18

countries covered



IN-TRANSITION TO MSC

The In-Transition to MSC (ITM) program supports fisheries as they work towards certification.

- Through independent verification of progress, it increases the credibility of fishery improvement projects (FIPs).
- And by providing access to MSC tools and expertise, it offers fisheries a fast track to sustainability.

HOW DOES ITM FIT IN TO OUR PROGRAM?

Pre-certification

Pathway to sustainability

- Pathway tools
 - Pathway projects
- In-transition to MSC ➤

Certification

Closure of conditions of certification



Ecological performance

A large, thick blue arrow pointing from left to right, positioned at the bottom of the slide. The text "Ecological performance" is centered within the arrow.

WHICH FISHERIES CAN JOIN ITM?

- Until October 2022, the ITM program was limited to small-scale fisheries, and fisheries in developing economies.
- Now all fisheries are welcome, regardless of size or location.
- Currently 19 fisheries in the ITM program

What does the ITM program involve?



MSC (PRE)-ASSESSMENT reports

Improvement action plan

Implement action plan & track progress

Full MSC assessment

Carried out or verified by a CAB within previous three years

Aim to achieve a conditional pass at the end of the program

CAB verified

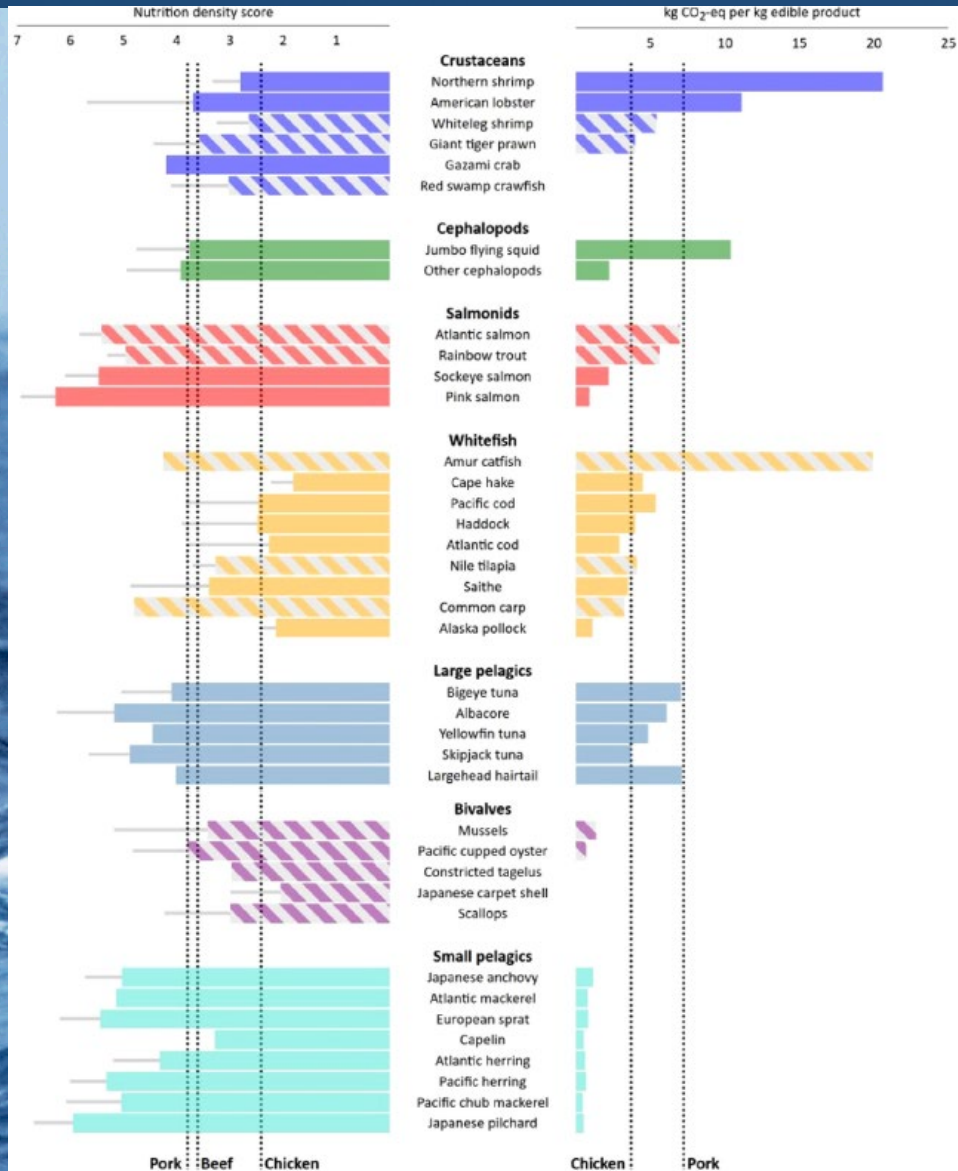
Regular verification of progress against action plan

CAB verified

All intended improvements achieved

Full assessment at the end of program

SEAFOOD PART OF THE BLUE FOOD SOLUTION?



- Fish is an important source of protein, globally.
- Seafood is a **highly nutritional and low-carbon alternative** to other food products such as Pork, chicken and beef.
- GHG emission accounting of seafood needs to be **complete, consistent and fair** in order to sustainably scale production for our future

MSC pilot (2023-2026)



- **Aims to explore how to measure scope 1 and 2 emissions in certified fisheries efficiently to enable fisheries to document and disclose GHGe in their operations**
- **Aims to eventually support certified fisheries to meet market and regulatory needs with an efficient voluntary 'bolt on'.**
 1. Can existing data on fishing intensity and registered engine power be used to accurately estimate fuel use in UK fisheries?
 2. What's the research landscape on measuring indirect energy use in marine wild capture fisheries?
 3. What energy use patterns can be identified across key target species and the associated gear type?
- **(2023) UK pilot study**
- **(2024) Voluntary reporting template development, and additional pilot studies in more regions**
- **(2024) Draft 'bolt on policy' documents, as needed for external consultation**
- **(2025) Deliver online emissions calculator (shared with ASC) and offer bolt on option to fisheries**

Let's talk about species

Key commercial species in
Poland and European
markets

- Wild Salmon
- Tuna
- Small Pelagics
- Whitefish



Wild salmon: in numbers

Chum, Coho-silwer, Pink, Sockeye

685,000

tonnes MSC engaged catch*

51

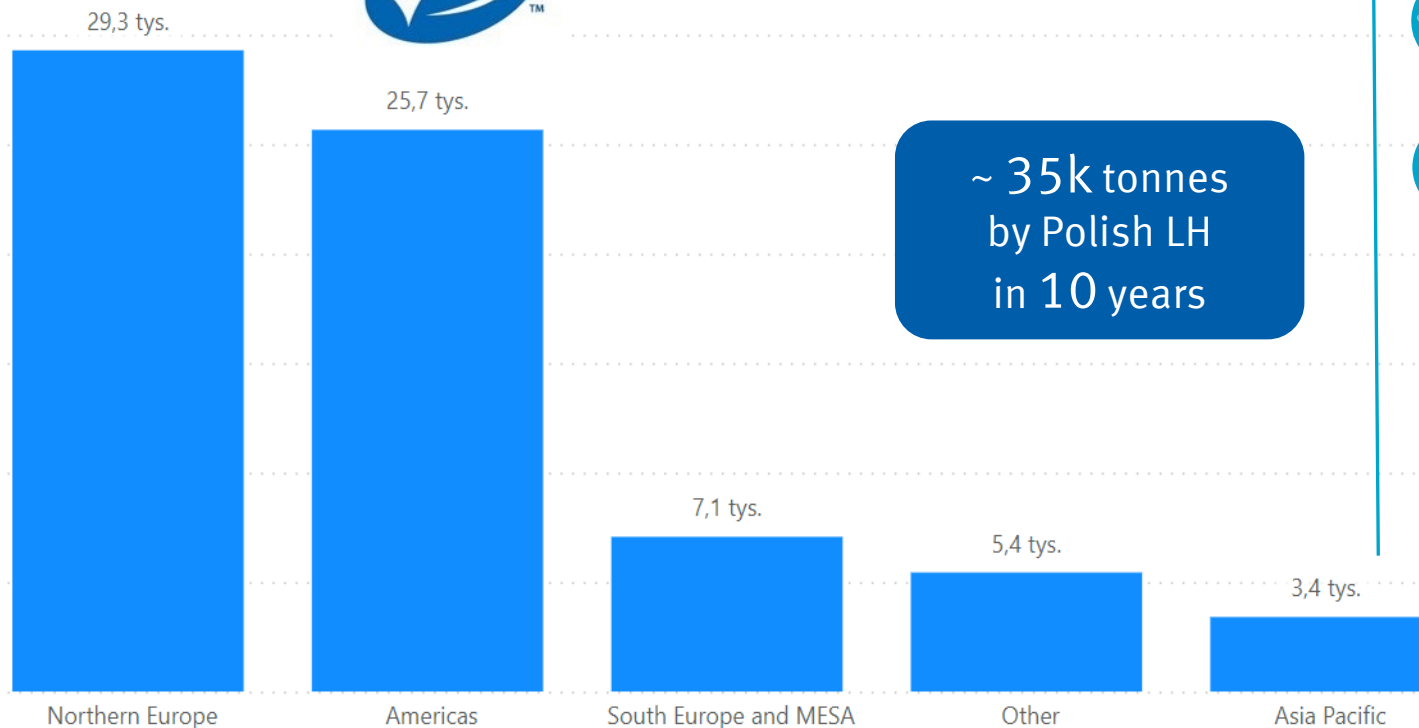
MSC engaged fisheries

68%

of global wild salmon catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes) in 22/23 by region



42

Improvements made over last three years by certified fisheries



2

Endangered, threatened and protected species and bycatch



1

Ecosystems and habitats



32

Stock status and harvest strategy



7

Fishery management, governance and policy

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

Sustainable salmon on Annette Island



“

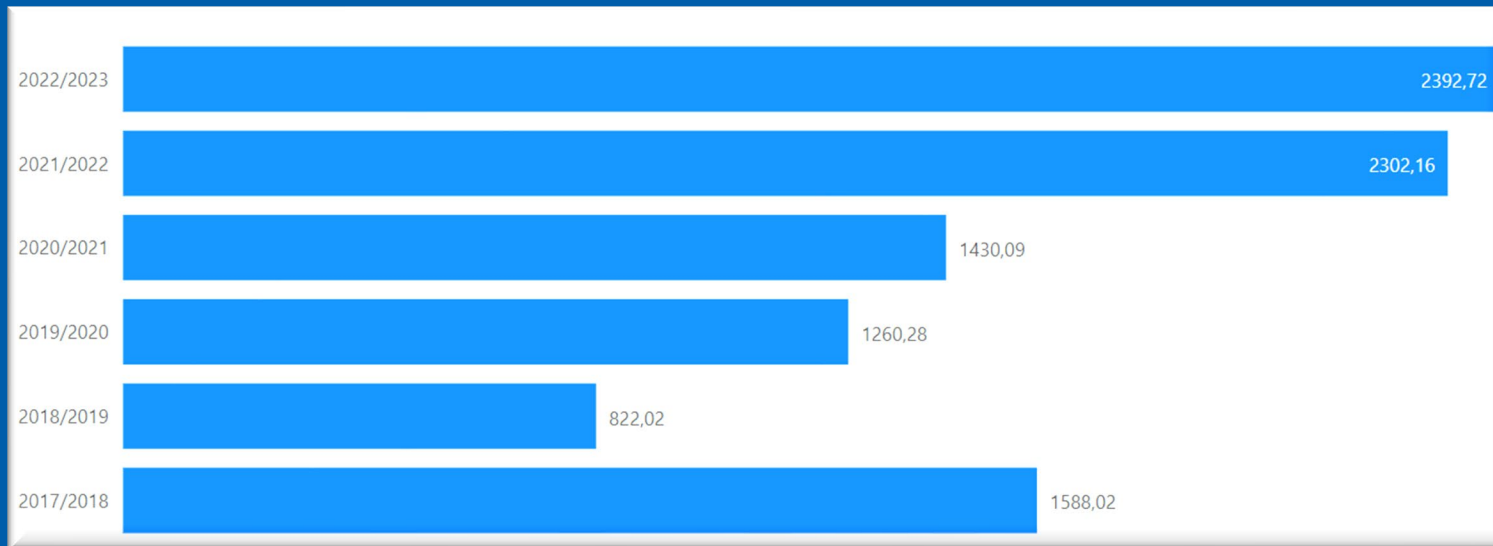
Salmon fishing has been part of our culture for generations, and we want to ensure that it remains so for generations to come. To be recertified by the MSC for a second time is testament to our commitment to caring for the resources that our ocean and rivers provide for us

”

Albert G. Smith, Mayor, Metlakatla Indian Community.

Let's talk

- Can the Polish industry produce more **wild salmon** from certified fisheries?
- Do you want to increase sales of **wild salmon** in Poland & CE?
- What is the biggest challenge and what is the opportunity?



Whitefish: in numbers

Pollock, cod, saithe, flat fish, haddock, hoki, hake ...

6,412,000

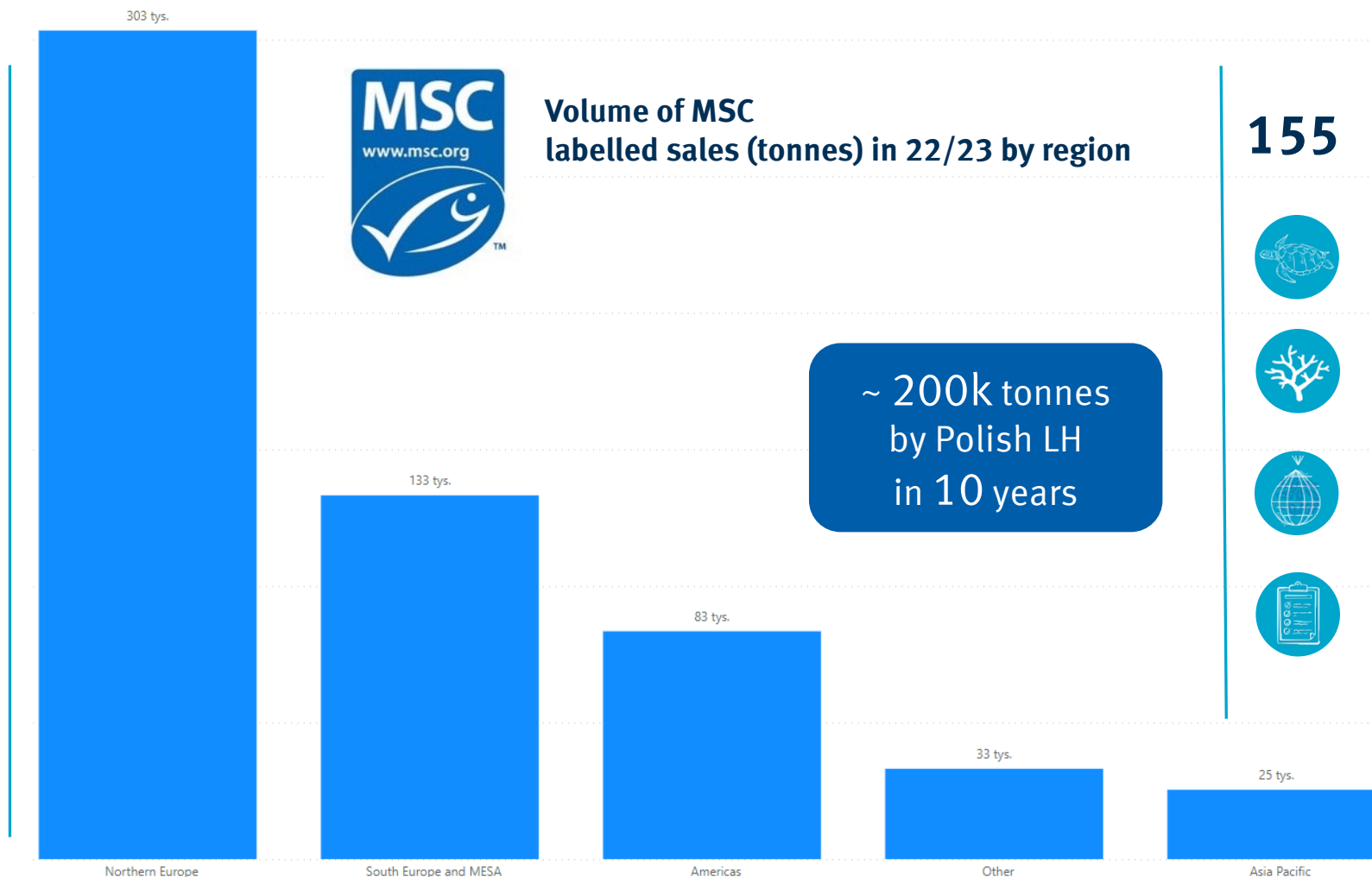
tonnes MSC engaged catch*

201

MSC engaged fisheries

75%

of global wild whitefish catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes) in 22/23 by region

~ 200k tonnes by Polish LH in 10 years

155

Improvements made over last three years by certified fisheries



93

Endangered, threatened and protected species and bycatch



44

Ecosystems and habitats



16

Stock status and harvest strategy



2

Fishery management, governance and policy

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Iceland:

**More than 10 years of
leadership**





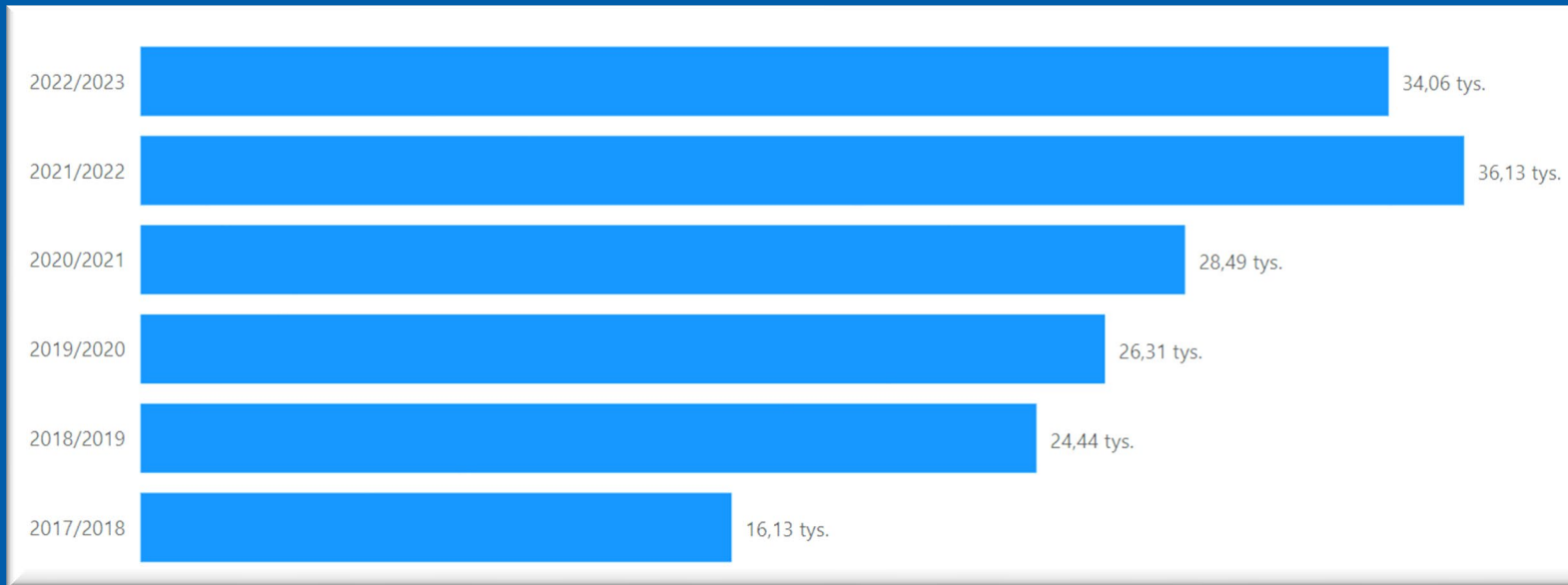
Hake improvements



Hake trawl vessel, the Laxe Dos leaves Walvis Bay harbour. The boat is part of the Namibian hake fishery certified in November 2020.

Let's talk

- Can the Polish industry produce more **whitefish** from certified fisheries?
- Do you want to increase sales of **whitefish** in Poland & CE?
- What is the biggest challenge and what is the opportunity?



Small pelagics: in numbers

Herring, Mackarel, Sprat. ..

3,868,000

tonnes MSC engaged catch*

42

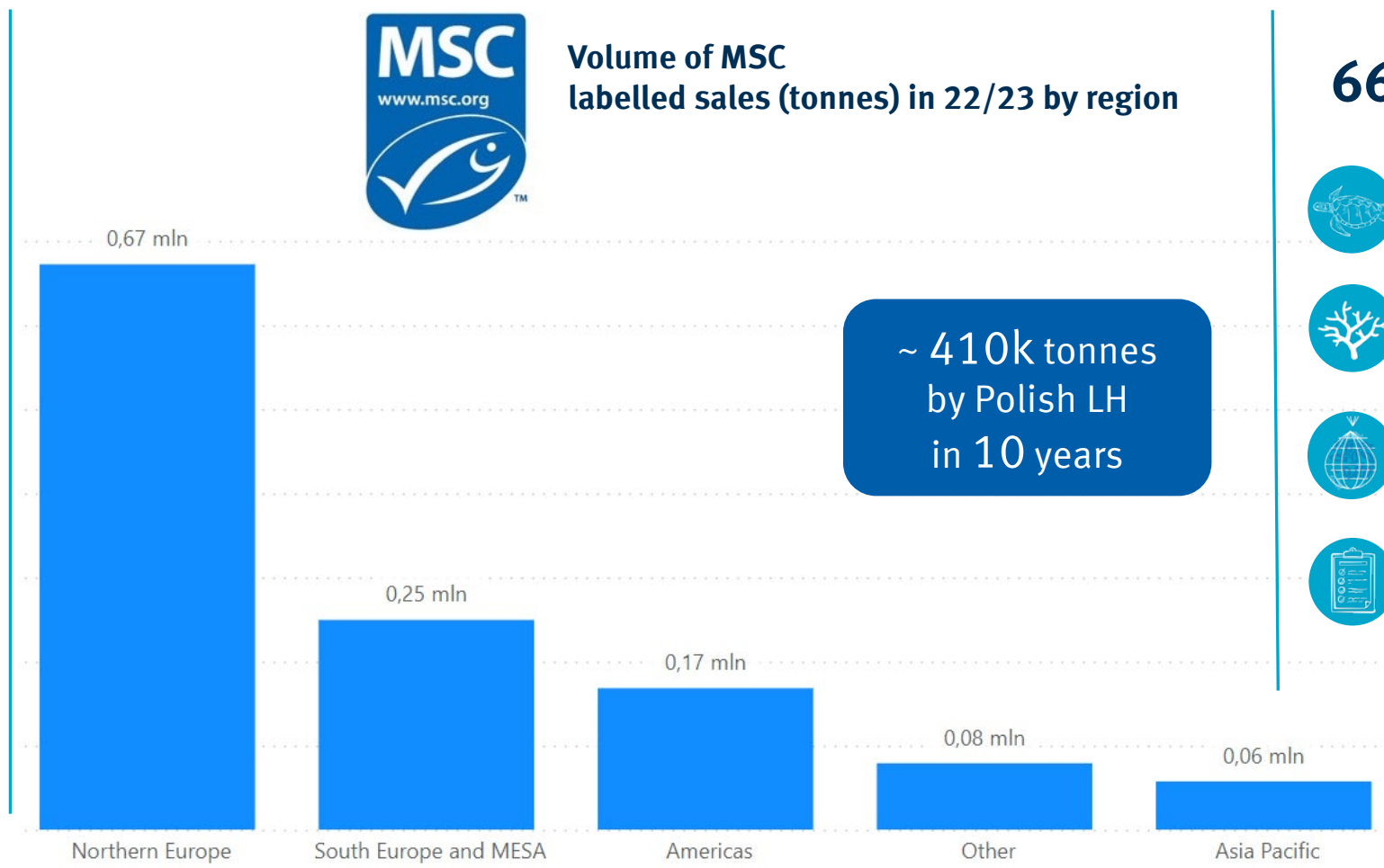
MSC engaged fisheries

15%

of global small pelagics catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes) in 22/23 by region



66

Improvements made over last three years by certified fisheries



13

Endangered, threatened and protected species and bycatch



8

Ecosystems and habitats



27

Stock status and harvest strategy



18

Fishery management, governance and policy

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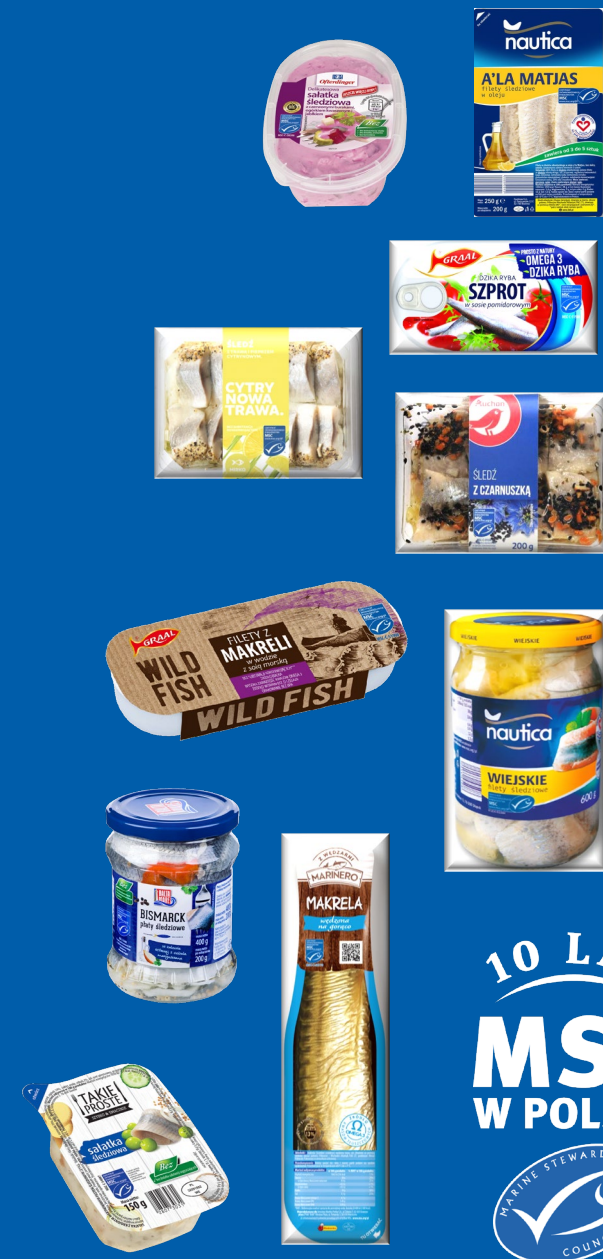
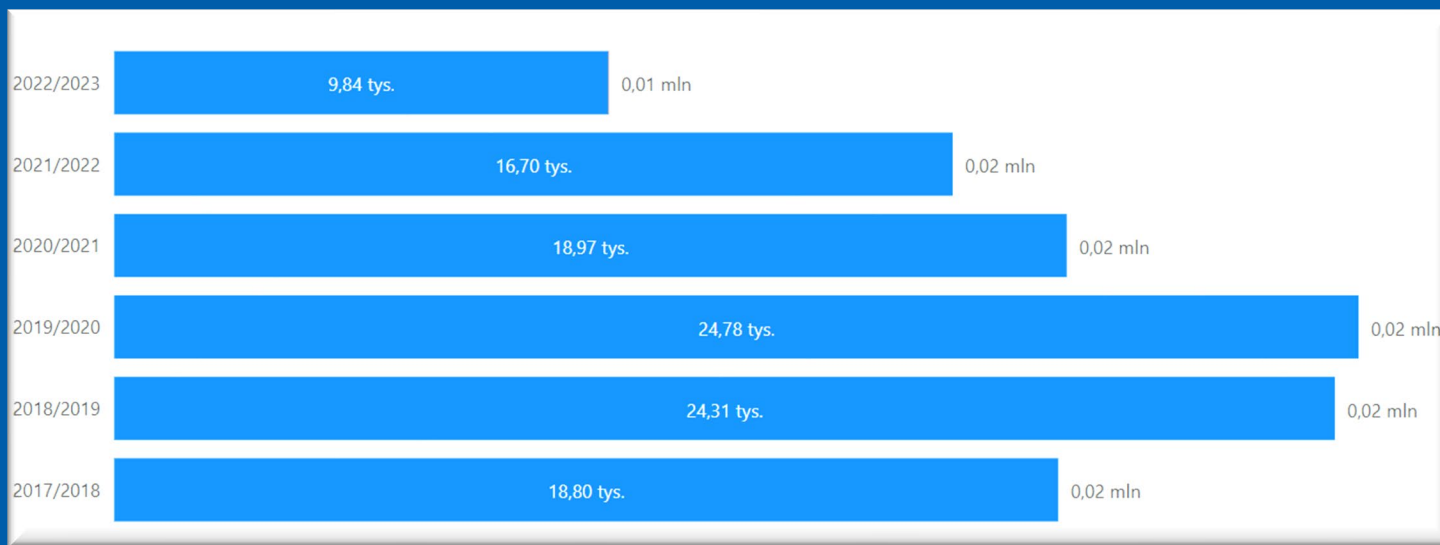
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North East Atlantic fish stocks



Let's talk

- Can the Polish industry produce more **small pelagics** from certified fisheries?
- Do you want to increase sales of **small pelagics** in Poland & CE?
- What is the biggest challenge and what is the opportunity?



Tuna: in numbers

Skipjack, albacore, yellowfin..

2,622,000

tonnes MSC engaged catch*

159

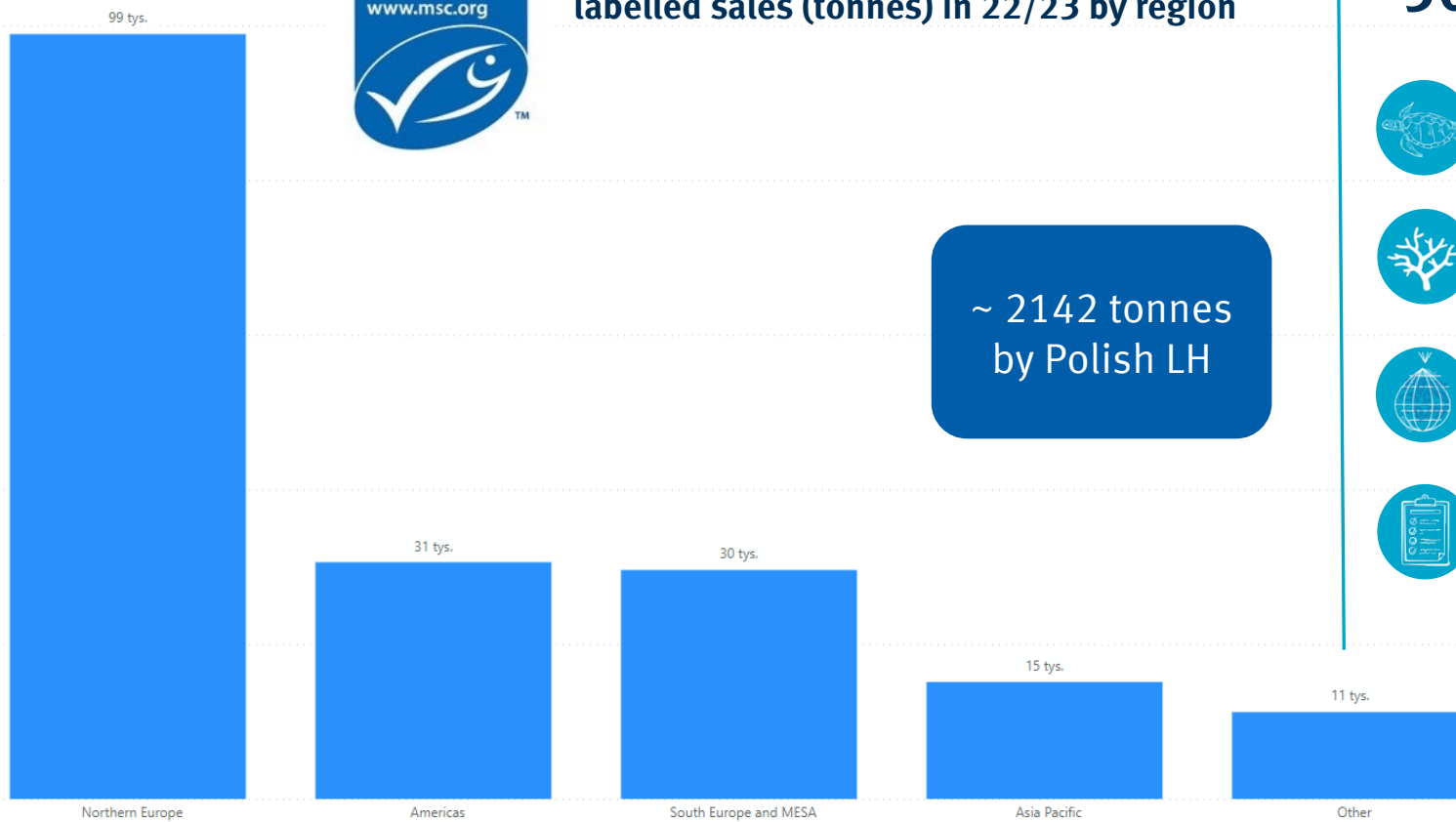
MSC engaged fisheries

33%

of global wild whitefish catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes) in 22/23 by region



50

Improvements made over last three years by certified fisheries



17

Endangered, threatened and protected species and bycatch



4

Ecosystems and habitats



3

Stock status and harvest strategy



26

Fishery management, governance and policy

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Progress in international management



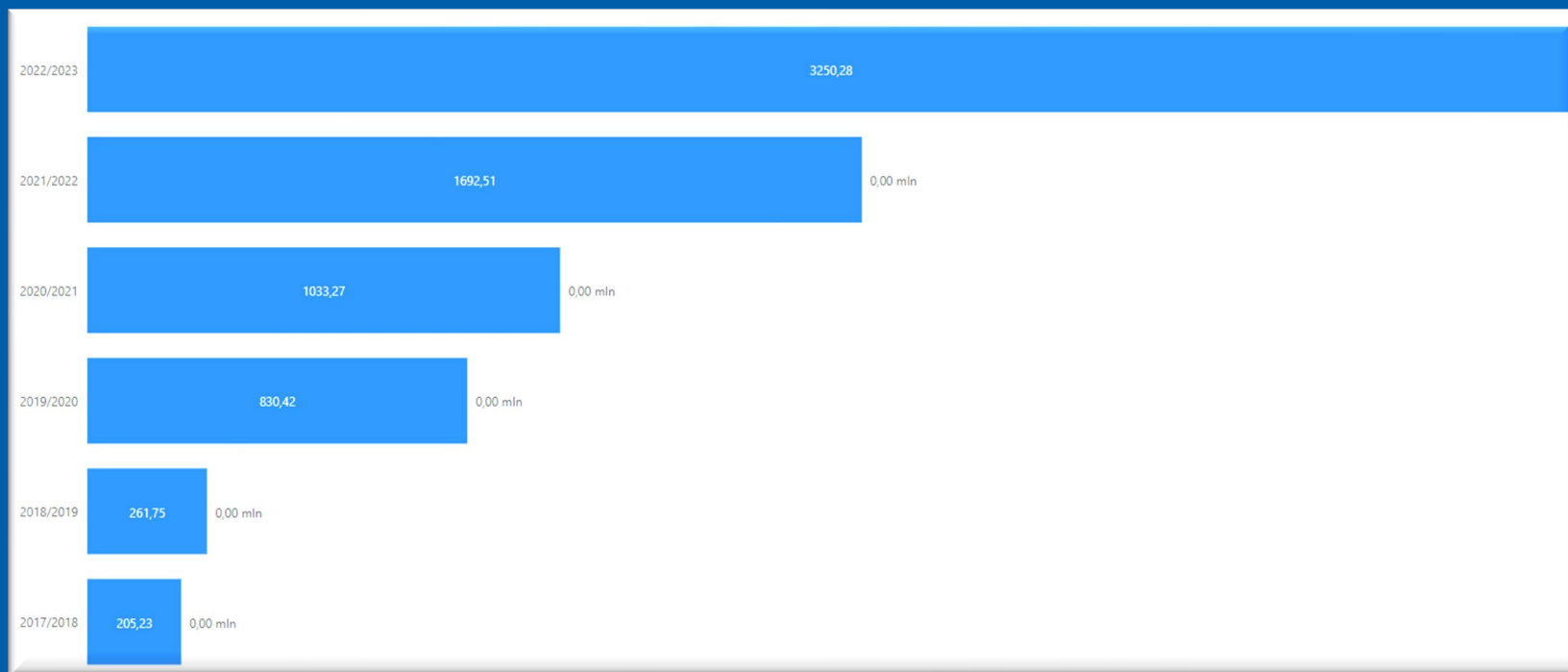
Ecuador celebrates tuna milestone



Hamis pulls tuna to the boat. © MSC

Let's talk

- Can the Polish industry produce more **tuna** from certified fisheries?
- Do you want to increase sales of **tuna** in Poland & CE?
- What is the biggest challenge and what is the opportunity?



Let's talk

- Can the Polish industry produce more **wild salmon/pelagics/whitefish/tuna** from certified fisheries?
- Do you want to increase sales of **wild salmon/pelagics/whitefish/tuna** in Poland & CE?
- What is the biggest challenge and what is the opportunity?



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Masz pytania? Skontaktuj się z naszym zespołem w Polsce:

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