The role of the market & consumers in promoting sustainable fisheries & delivering conservation outcomes

The Business and Biodiversity Forum, Cancun 2016
MISSION
MSC certified fisheries

310 fisheries certified to the MSC Fisheries Standard

9.4 million tonnes of seafood caught per year is MSC certified

10% of wild seafood catch is now MSC certified

81 fisheries in assessment

Number of MSC certified fisheries

The Market - Sustainability matters
Reflected in rapid growth in labelled products

20,492
products on sale with the blue MSC label on 31 March 2016
(up from 17,200 on 31 March 2015)

659,399
tonnes of MSC labelled seafood bought by consumers in 2015-16
(up from around 620,000 tonnes in 2014-15)

Estimated
us$ 4.6bn
Spent by consumers on MSC certified seafood in 2015-16
Consumer perceptions of sustainable seafood

New insights from 2016 global consumer research
Wide understanding and demand for sustainable seafood

I understand the term 'sustainable' when I see it on a product

- Describes opinion well: 67%
- Neutral: 16%
- Doesn’t describe opinion well: 13%
- Don’t know: 4%

People should be prepared to change to another type of seafood if it is more sustainable

- Describes opinion well: 68%
- Neutral: 16%
- Doesn’t describe opinion well: 11%
- Don’t know: 4%

To save the oceans, we have to consume fish/seafood only from sustainable sources

- Describes opinion well: 72%
- Neutral: 14%
- Doesn’t describe opinion well: 10%
- Don’t know: 4%

Question: How well does each of the following statements describe your opinions?
Question: How well do you think the following institutions are contributing to protecting the ocean environment?
Independent labelling contributes to brand trust

Supermarkets' and brands' claims about sustainability and environment need to be clearly labelled by an independent organisation

Ecolabels on seafood products raise my trust and confidence in the brand

Question: How well does each of the following statements describe your opinions?
Question: 4.2 Thinking about your recent purchase of [answer from 4.1], which of the following five considerations was the most important and which was the least important? [Each respondent sees eight sets of five statements rotated]

- Good for my health/my family’s health
- Fresh
- Safe to eat
- Taste
- Sustainably sourced/environmentally friendly
- Not GMO
- Price
- Dolphin/turtle friendly
- A type of fish I've always eaten
- Fairly traded
- Clearly marked country of origin
- Caught in the wild
- Easy to cook
- Has an ecolabel
- Organic
- Sourced locally
- Preferred brand
- Fishing method
- Farmed

Base: Seafood consumers globally, n=16,876

And they rate sustainability second to health and quality

Price, brand and quality are the top 3 in other FMCG categories

Importance score (out of ten)

<table>
<thead>
<tr>
<th>Consideration</th>
<th>Primary FMCG purchase drivers</th>
<th>Secondary FMCG purchase drivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good for my health/my family’s health</td>
<td>8.36</td>
<td></td>
</tr>
<tr>
<td>Fresh</td>
<td>8.31</td>
<td></td>
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<tr>
<td>Safe to eat</td>
<td>8.10</td>
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<tr>
<td>Taste</td>
<td>7.86</td>
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<tr>
<td>Sustainably sourced/environmentally friendly</td>
<td>6.22</td>
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<tr>
<td>Not GMO</td>
<td>5.49</td>
<td></td>
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<tr>
<td>Price</td>
<td>5.39</td>
<td></td>
</tr>
<tr>
<td>Dolphin/turtle friendly</td>
<td>4.44</td>
<td></td>
</tr>
<tr>
<td>A type of fish I've always eaten</td>
<td>4.40</td>
<td></td>
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<tr>
<td>Fairly traded</td>
<td>4.30</td>
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<tr>
<td>Clearly marked country of origin</td>
<td>4.16</td>
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<tr>
<td>Caught in the wild</td>
<td>4.08</td>
<td></td>
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<tr>
<td>Easy to cook</td>
<td>4.05</td>
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<tr>
<td>Has an ecolabel</td>
<td>4.05</td>
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<tr>
<td>Organic</td>
<td>3.46</td>
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<tr>
<td>Sourced locally</td>
<td>3.42</td>
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<tr>
<td>Preferred brand</td>
<td>2.94</td>
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<tr>
<td>Fishing method</td>
<td>2.74</td>
<td></td>
</tr>
<tr>
<td>Farmed</td>
<td>2.32</td>
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</table>
“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
WILD CAUGHT FISH

Our Lighthouse Bay wild-caught fish is sourced from MSC certified sustainable fisheries.
“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
“I am really proud that our customers can enjoy tasty fish that has been responsibly produced by people with good working conditions. This is a result of our high ambitions and commitment regarding the whole value chain; from fisheries and farms to training of our co-workers and certification of the restaurants.”

Michael La Cour, Managing Director of IKEA Food Services AB.
China Sustainable Seafood Week

**Co-Organizers**
- COFA
- China Sustainable Retail Roundtable
- WWF

**Retailers**
- AEON
- IKEA
- 大润发 RT-Mart
- ole'
- CITY SHOP
- Surys

**E-commerce Platform**
- 京东生鲜

**Hotels**
- HYATT
- 上海希尔顿逸林酒店

**Suppliers**
- Cleanwater
- FROSTA
- Ocean Gala®
- ZONECO
MSC in Space

“Lots of ocean, but there’s still overfishing and destruction of marine life. Sustainable fish is an alternative. Even in space we eat MSC-certified fish.”

Dutch astronaut André Kuipers on board the International Space Station enjoying MSC certified and labelled wild sustainable Alaskan Salmon