

**Marine Stewardship Council**

# **Seafood Sustainability Certification**

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**Marine Fisheries Advisory Committee**

**May 9, 2013**

**Washington, D.C.**

## **Objective: Help inform MAFAC's examination of the potential for a NOAA seafood sustainability certification**

- How MSC serves the demand for sustainability certification
  - Importance to fisheries of a global program and reach
  - The power of partnering versus duplicating or competing
  - Considerations for MAFAC and NOAA
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# Serving Demand for Certification

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## What MSC is:

- An independent organization created 15 years ago to service market demand for an international standard for sustainability of fisheries
- The result of 2 years of work by more than 300 industry experts, fishery managers, academics, conservation groups, independent scientists, and others
- Operating with a mandate for diverse sector representation in governance
- Open and transparent
- Collaborative and partner-based
- A global market partner for certified fisheries

## What MSC is not:

- Fishery managers
  - A for-profit enterprise
  - Engaged in assessments to the Standard
  - A party to time and expense fees paid to certifiers for an assessment process
  - Aligned with any one sector
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# Marine Stewardship Council (MSC)



- The world's most recognized and credible seafood sustainability certification and ecolabeling program
- Two international MSC standards:
  - **Fisheries:** standard for sustainable and well-managed fishing
  - **Chain of Custody:** Traceability certification of companies in the supply chain
- Not a general species rating but fishery by fishery assessments
- Broad consultation on MSC standard development and improvement (i.e. current Fishery Standard Review and Speed and Cost Review)
- Objective and scientifically verifiable; rigorous and comprehensive; open and transparent
- Third-party independent, accredited certification teams



MSC-certified  
sustainable seafood  
... from boat to plate!



# MSC Global Reach



- 200 fisheries certified, 100 fisheries in full assessment
- Over 18,000 products labelled worldwide
- About 11 percent of global wild capture in the MSC program
- Close to 10 million metric tonnes certified and in assessment

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# Global Context and Reach

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- Seafood is the largest globally traded primary commodity
  - U.S. imports 90+% (some of it is reprocessed U.S. fish). Global certification and traceability make us more informed buyers and consumers
  - MSC helps with the issue of unequal competition with less well-managed fisheries
  - International buyers source from many countries and want a global program, independent from industry and management
  - More than 2,300 companies worldwide have MSC Chain of Custody certification for traceability, representing more than 33,500 sites
  - MSC's new 5-year Integrated Strategic Plan indicates strong program uptake in Asia and Latin America, and continued fishery and commercial expansion in North America and Europe
  - MSC is putting an emphasis on addressing small-scale fishery access and cost issues
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# Global Context and Reach



## Major Global Companies Committed to Sourcing and Selling MSC Certified Sustainable Fish



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# Global Context and Reach

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- Committed to having 100% of contracted wild-caught seafood certified by the Marine Stewardship Council by 2015 across the 80 countries where it operates
- Locations certified in the greater Washington, D.C. metropolitan area include: National Geographic, National Academy of Sciences, National Aquarium, The Brookings Institution, International Monetary Fund, Gannett, Marriott International, Sodexo Headquarters (Rio Café), Marymount University, The University of Mary Washington and George Mason University. These alone are expected to reach more than one million consumers



## Colleges and Universities

- Notre Dame
- University of California, Berkeley
- Cornell
- Loyola Marymount

...and 5 more are certified



- 15 more prominent colleges and universities are actively in the pipeline



# Global Context and Reach



## MSC Media Highlights

We reached more than 37 million North American consumers alone in 2012



The Washington Post



THE WALL STREET JOURNAL  
ONLINE

FOX BUSINESS News | Investing | Technology | Personal Finance | Business Leaders | Travel | On Air

Editor's Picks  
Sushi chain seeks to go nationwide [Recommend](#)  
Apr 12, 2012 - 7:56 - What exactly does this mean for Sushi Maki and why is this so significant?



The New York Times

Living on  
EARTH



Recent social media campaign reached 700,000 people



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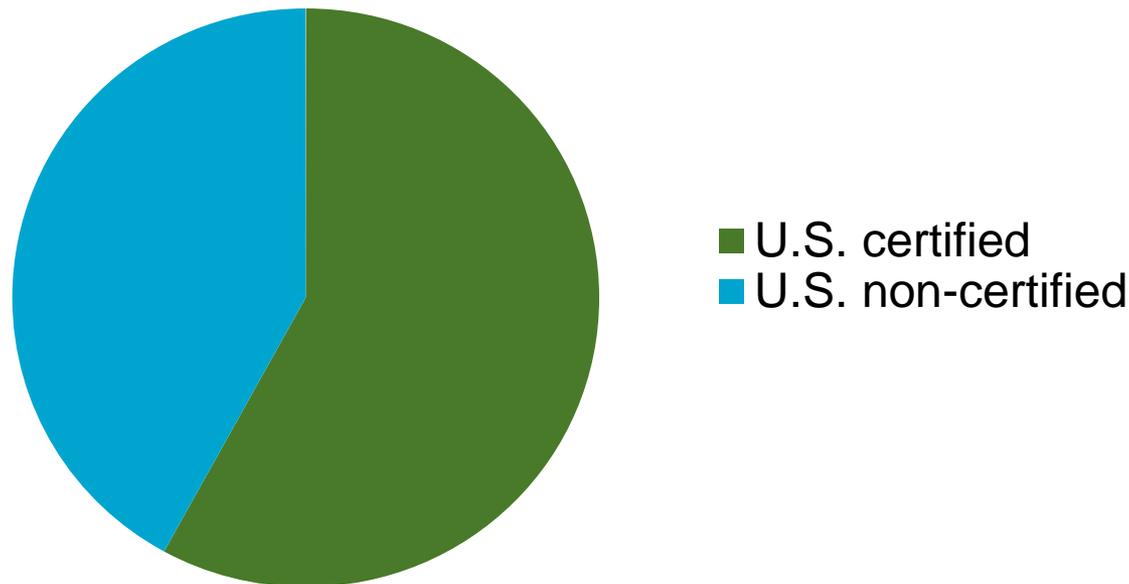
# More Powerful by Partnering

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## Fisheries: Proportion of total

**U.S. fisheries by volume of landings: 58% is MSC-certified**



A large body of fishery certification work has already been done, supported by NOAA, state and regional data

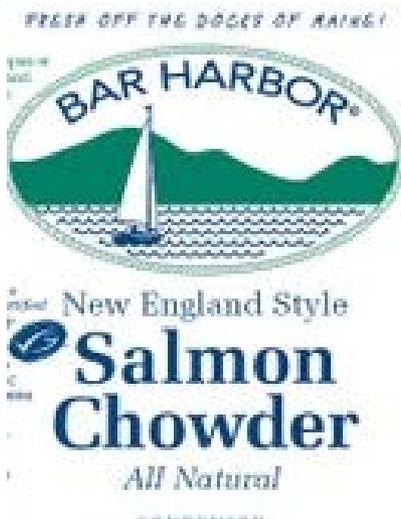
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# More Powerful by Partnering



## Products

MSC strongly encourages promotion of U.S. local, regional, state and national provenance on labeling



Front page in weekly circular

catch the wave with

**1** The fishery must be conducted in a way that does not lead to over-fishing or depletion of the target stock.

**2** Fishing operations must be undertaken in a manner that minimizes fishery-related impact to the ecosystem

**3** The fishery must be subject to an effective managementsystem thatpromotes responsible and sustainable fishing, on which the fishery depends.

CERTIFIED SUSTAINABLE SEAFOOD MSC www.msc.org

Wild Caught Cod Fillet  
Previously Frozen

**6.98** lb  
Captain's Cut Cod Loins... \$7.98 lb

The MSC has developed standards for sustainable fishing and seafood traceability. Both standards meet the world's toughest best practice guidelines and are helping to transform global seafood markets. www.msc.org

The Gulf of Maine Research Institute (GMRI) is an independent, non-advocacy research entity focused on catalyzing solutions to the complex challenges of ocean stewardship and economic growth in the Gulf of Maine bioregion. www.gmri.org

Items in this ad & in store require an Express Savings Club® Card or Silver Savings Card. Not responsible for typographical errors. In all not available in some lots or to other dealers or wholesalers. Some items in the offer unless Silver Savings Club® card is presented. Save on up to 5 of

# More Powerful by Partnering



Naturally - Your Environmental Choice



The MSC label is your assurance that Alaska salmon has not contributed to the environmental problem of over fishing.



# More Powerful by Partnering



**WAL\*MART**



Circular distributed to 90 million U.S. households:

**Sockeye Salmon FILLETS**

Individually Vacuum-Sealed All Natural  
Bristol Bay Sockeye Salmon  
Alaska Wild Caught

NET WT 12 OZ (340 G) KEEP FROZEN

**Halibut STEAKS**

Individually Vacuum-Sealed All Natural  
Alaska Wild Caught

NET WT 12 OZ (340 G) KEEP FROZEN

**3<sup>98</sup>**  
Frozen Wild Salmon Fillets  
1 1/2 packages.  
Marine Stewardship Council-certified.

**1<sup>66</sup>**  
Trans-Oceanic® Crab Classic Flake Style  
Made with Alaskan pollock, an excellent source of Omega-3 fatty acids. 8 oz.  
Marine Stewardship Council-certified.

**60¢ each**  
Was .68  
Campbell's® Soup  
Chicken Noodle or Tomato. 10.75 oz.  
These cans are 100% recyclable. And condensed soup saves even more on packaging and shipping.

**3<sup>98</sup> each**  
Nature Valley® Granola Bars  
100% natural. 12 ct., 74-8.9 oz.  
By recycling and making the boxes smaller, Nature Valley eliminated 75 tons of packaging material last year.

**3<sup>50</sup>**  
Was 3.98  
Kellogg's® Rice Krispies® Treats  
16 ct.  
These new cartons hold the same treats with 5% less packaging. Which saves trees and reduces waste.

**2<sup>50</sup>**  
Kellogg's® Special K® Bars Assortment  
6 ct., 4.6-4.86 oz.  
The new package uses 11% less material with the same amount of great food.

**2<sup>82</sup>**  
Cheerios®  
Box made from 100% recycled materials. 14 oz.  
Cheerios will save over 500 tons of packaging each year by reducing the materials used to ship and package its products.

**WAL\*MART** 13

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# More Powerful by Partnering

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## The McDonald's Example



## McDonald's Certifies Filet-O-Fish

14,000 McDonald's restaurants across the U.S. are MSC-certified and promoting the sustainability of their 100% U.S. sourcing



# More Powerful by Partnering



## Mainstream Media Coverage – McDonald's Launch

The New York Times



HUFFPOST



A GANNETT COMPANY



Los Angeles Times



#1 story on launch day



The Miami Herald

FOOD WORLD NEWS



The Washington Post

DALLAS Observer



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# More Powerful by Partnering

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## Trade Media Coverage – McDonald's Launch

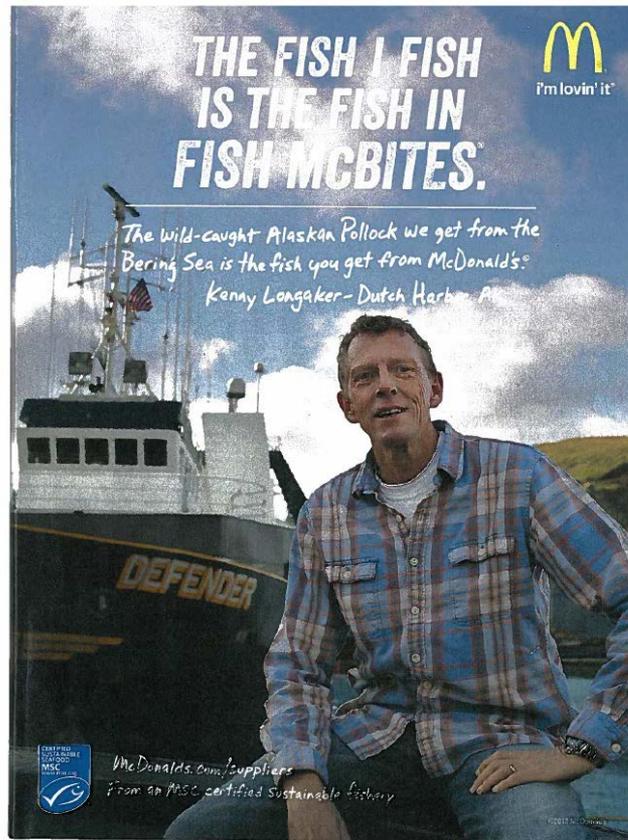


# More Powerful by Partnering



## McDonald's Print Ad Campaign

Full page ads appeared in these U.S. publications with a combined circulation of 30,000,000



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# More Powerful by Partnering

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- U.S. fisheries are getting credit for sustainable management in these and other significant promotions at home and around the world
  - U.S. fishermen and harvesters, not just processors, benefit from participation in an international sustainability partnership
    - Market access
    - More stable supply relationships
    - Higher demand and, in some cases, prices
    - International reputation
    - Improved conservation relations
    - Greater media and promotional exposure worldwide
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# Testimonials



**“MSC certification has opened up new commercial opportunities for us, including new value-added business.”**

- Ron Habijanac, President and CEO, Harbour Maine Products, Inc.

**“The most notable achievement in our fishery in recent years is clearly becoming MSC certified. It will be a proud legacy for those who supported this initiative.”**

- Derek Butler, Association of Seafood Producers, St. John's, Newfoundland

**“As the only well recognized independent label, the MSC makes it easy for consumers to choose sustainable fish.”**

- Christien Absil, Fisheries Policy Officer, North Sea Foundation

**“MSC is seen as the gold standard.”**

- Nathan de Rozariex, fisherman Project Director, Seafood Cornwall

**“I know that our member companies have kept customers as a result of MSC certification, and have broadened their customer base because of it.”**

- Jim Gilmore, Public Affairs Director, AT-Sea Processors Association



## Credibility and Overlap Issues

- Puts government in the role of assessing and certifying its own work as fishery managers
  - Not independent and third-party, making it inconsistent with FAO ecolabeling guidelines
  - Conservation organizations may question the integrity of a first or second-party program
  - International benchmarking evaluations have downgraded programs that are not true third-party; low marks on benchmarking studies damage credibility
  - GSSI will be a significant player in narrowing the field of accepted label programs
  - How will a federal U.S. program interface with overlapping state, tribal and highly migratory managed fisheries not subject to MSA?
  - How will a U.S. federal certification help level the playing field with competitive foreign fisheries?
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## Cost and Efficiencies

- Costly to develop and operate a credible sustainability certification and labeling program
    - Example: for ASMI's "free" program, the ASMI board approved a start-up budget of \$7 million of taxpayer and industry money to create a program, engage the first four fisheries and promote the program in Europe and elsewhere
  - In MSC's royalty fee business model, program costs are spread to end users
  - If buyers still require MSC of their suppliers, multiple certification processes could overburden the system and industry
  - NOAA data, provided to assessors for MSC certification in accordance with NOAA's policy of no tailored work production for MSC assessments, is helping to essentially get the job of U.S. fishery certification done in a cost neutral/low-additional-effort way to government
  - MSC, which partners with ASC on Chain of Custody, has a full traceability program in place, a requirement to make any label meaningful
  - Rumors of \$2 million MSC assessments are a myth
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## Confusion and Communications Challenges

- There is serious concern about the number of ecolabels and label confusion in the marketplace, including seafood
  - Developing its own label could spawn challenges to the excellent and well-deserved reputation NOAA has as fishery managers
  - Proliferation of local, regional, state and other national labels would be competition for a NOAA label
  - Communicating proactively with a broad consumer base regarding sustainable seafood is an intensive and expensive undertaking
  - Overall sustainability messaging is more difficult and weakened when there are too many labels and label confusion
  - The future: Too many labels weaken the majority of them OR market consolidation effectively narrows the field to a few
  - MSC and NOAA have opportunities to work more closely on co-labeling and promoting U.S. fishery sustainability
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HOW STANDARDS PROLIFERATE:  
(SEE: A/C CHARGERS, CHARACTER ENCODINGS, INSTANT MESSAGING, ETC.)



Source: xkcd Webcomics