



Celebrating Sustainable Seafood

**The Marine Stewardship Council
Annual Report 2022-23**



“

As a passionate environmentalist and chef, there’s nothing more important than choosing ingredients that make a positive impact on the environment and taste good. I’m delighted to partner with the MSC on its important work to stop overfishing and support certified sustainable fisheries that serve hardworking, rural communities.

James Strawbridge, chef, MSC ambassador

”

Contents

Messages from our Chief Executive and Chair	2
A year of achievement	4
Blue foods in focus	6
Setting a course for 2030	7
The revised MSC Fisheries Standard	8
Progress on the water	10
Delivering impact	12
Anchored in science	14
Supporting transformation in global fisheries	16
Scaling impact: MSC’s Ocean Stewardship Fund	18
Corporate partnerships	20
Sustainable seafood sales	22
Consumer awareness	24
Species focus	26
Our funding and donors	40
Governance 2022-23	42



Reflections on a landmark year

A message from our CEO

Last year was a big year for the ocean, with governments reaching landmark agreements to protect biodiversity and the high seas. The seafood sector will have an important role to play in meeting these commitments, just as it does in contributing to the delivery of the United Nations Sustainable Development Goals (SDGs) and responding to climate change.

Despite these multilateral efforts, we face multiple challenges, including a retreat from globalisation, war in Ukraine, the threat of recession, and high and stubborn inflation taking hold in major economies around the world. The impact on the seafood industry and consumers has been profound. Against this backdrop, we must not lose the momentum that we have built in the sustainable seafood movement.

MSC's Fisheries Standard lies at the heart of our program and this year saw the culmination of a four-year consultation and review process and the launch of Version 3.0. New requirements have been introduced to strengthen the protection of endangered, threatened and protected species, to reduce ghost gear and improve international management of shared fish stocks. An additional £1 million has been made available in 2023/24 for projects and research to facilitate the successful roll-out and implementation of the revised Fisheries Standard.

We also launched our new strategic plan. The plan reaffirms our goal to engage over a third of wild-caught seafood in the MSC program by 2030. To do this, we need to scale our work further, especially in developing economies, and ensure we continue to add value for certified fisheries and seafood businesses.

One way we are doing this is through our Ocean Stewardship Fund. With both allocated and philanthropic funding, we have awarded grants worth nearly £4 million to fisheries to make improvements on their pathway to sustainability or close down conditions of certification, and to fund research and innovation projects.

The sudden death in May 2023 of Hart Schafer, just weeks before he was to take over as MSC Chair, shocked us all. We are profoundly saddened that we will not get to share our journey with Hart. On a personal note, I want to express my gratitude to our long-serving Chair, Werner Kiene, who has agreed to stay on until a suitable replacement is found.

Thank you to everyone who has supported us this year. I know your engagement and leadership is making a real difference to the way our oceans are being fished. MSC will redouble our efforts to add value to certified fisheries, to recognise and celebrate them, and to work with you to continue to incentivise improvements in the way our oceans are fished.

Rupert Howes, Chief Executive, Marine Stewardship Council



Ten years of progress

A message from our Chair

This was to be my last year as Chair of the MSC Board of Trustees, but the tragic death of my successor means I will stay on into 2024. The MSC's new Chair will, however, come to an organisation ready to accelerate its impact. Having reshaped its governance, the MSC is now better placed to play a more strategic role in responding to a range of global issues. In the last year, we have managed some difficult challenges, including the growing impacts of climate change on fisheries, and the war in Ukraine and its effects on global cooperation. We have also seen the fruits of our efforts to inform fisheries policy, with significant progress in regional fisheries management bodies in the Pacific and a growing recognition of the importance of sustainable fishing to global food security.

During my 10 years as Chair, I have seen the MSC become a more global organisation, broadening and deepening its impact. Our understanding of sustainable fishing has also expanded as science continues to reveal the complexities in our interconnected marine ecosystems. This is reflected in our revised Fisheries Standard – the product of a tremendous cooperative effort between the many stakeholders and technical experts who contributed to its development.

As a Board, we have worked hard to create an atmosphere in which this kind of cooperation can thrive. As a multistakeholder organisation dealing with complex issues, it is important to be patient, listen, be open to change and foster mutual understanding.

I am grateful to all those whose efforts enable the MSC to contribute to the health of the world's oceans. In particular, I would like to thank my colleagues on the Board and the MSC's management team, as well as the members of our Stakeholder Advisory Council and Technical Advisory Board for their expertise and commitment. It has been a privilege to be part of the MSC's journey over the past decade, and I look forward to seeing its impact continue to grow in the future.

Werner Kiene, Chair, Marine Stewardship Council Board of Trustees



A year of achievement



Americas US

In March 2023, UN member states reached an agreement in New York on the High Seas Treaty, the result of 20 years of talks.

Long-term dedicated partners American Tuna, Oregon Trawl Commission and Pontchartrain Blue Crab were recognised with 2022 MSC US Ocean Champion Awards.

Two new fisheries achieved certification: US Atlantic scup in May 2022 and Hawaii longline swordfish, bigeye and yellowfin in September 2022.

Canada

At the UN biodiversity conference in Montreal in December 2022, MSC certification was officially recognised as an indicator to measure countries' progress towards two of the targets in the new global biodiversity framework.

Chile

Sustainable management has paid off for Chile's jack mackerel fisheries, with major retailers and manufacturers in Europe starting to source MSC certified jack mackerel.

Ecuador

In July 2022, the TUNACONS yellowfin tuna fishery in the Eastern Pacific became the first tuna fishery in Ecuador to achieve MSC certification.

Main image: Processing hake, South Africa hake trawl © David Loftus/MSC
Inset image: Hands holding crabs © Bart van Olphen/MSC



© Neo Estudio

Europe Spain

In a global first, the Spanish tuna association, AGAC-OPAGAC, achieved certification in all four tuna-fishing ocean regions in July 2022.

In November 2022, Alcampo became the first retailer to launch an own-brand skipjack canned tuna product with the MSC blue label in the Spanish market.

Portugal

The UN Ocean Summit in June 2022 called for a "Blue Transformation" to enable aquatic foods to make a greater contribution to food security.

Aldi launched the first own-brand canned tuna product with the MSC label for the Portuguese market in November 2022, and achieved MSC certification for all its hake products in December that year.

France

In February 2022, in collaboration with the Aquaculture Stewardship Council (ASC), MSC France ran its annual Responsible Fishing and Aquaculture Week with 56 partners taking part.

In July 2022, the Réunion longline swordfish fishery achieved certification for the first time.

Faroe Islands

Queen scallop joined the growing list of MSC certified seafood from the Faroe Islands in July 2022.

Germany

In September 2022, MSC Germany published a landmark fisheries report to mark MSC's 25th anniversary.

Norway

Norway's Greenland halibut fishery achieved MSC certification in January 2023, adding more than 14,000 tonnes of certified halibut to the market.



Oceania Australia

In June 2022, Rare Foods Australia achieved MSC certification for its enhanced abalone fishery, which includes 20km of purpose-built reef off the coast of Western Australia.

Western Australia enhanced Abalone fishery © Rare Foods Australia

Asia China

As of November 2022, all McDonald's restaurants in China had MSC chain of custody certification, bringing the MSC ecolabel to the attention of millions of consumers across the country.

Vietnam

At the annual meeting of the Western Central Pacific Fisheries Commission in December 2022 in Da Nang, 26 member states agreed crucial measures on harvest strategies for tuna stocks.

Indonesia

In October 2022, MSC renewed its partnership with the Indonesian government's Ministry of Marine Affairs and Fisheries to support multiple fishery improvement projects across Indonesia, the world's second largest seafood producer.

South Korea

In April 2022, E-mart, the largest retailer in Korea, achieved chain of custody certification for all its stores, and launched three private-brand pollock roe products with the MSC ecolabel.



McDonalds © MSC

Blue foods in focus

Choosing the MSC blue label helps support the blue transformation.

With the global population expected to reach 9.6 billion by 2050, the pressure on food systems is increasing. But there's growing acceptance that scaling up the production of sustainable food from oceans, rivers and lakes – known as “blue food” – can help feed a growing population while reducing environmental impacts.

Along with aquaculture and seaweed, wild-capture fisheries have a key role to play. On average, seafood has far greater nutritional benefits than meat from land-based animals, and results in lower carbon emissions. Wild fisheries produce 1-5kg of CO2 per kilo of fish caught, compared with 50-750kg of CO2 per kilo of red meat. Wild seafood also doesn't require land or fresh water, fertilisers or pesticides.

With demand for seafood set to double by 2050, it's vital that any expansion of aquatic food production is sustainable. As a member of the Aquatic Blue Food Coalition, launched at the UN Ocean Conference in 2022, we're committed to doing our part in enabling everyone to benefit from the potential of blue food while safeguarding life in the ocean.

“

There is now wide acceptance across governments that aquatic foods will play a fundamental role in feeding a growing population while reducing carbon emissions and pressure on land-based sources of food – but only if they are produced in a sustainable way

Professor Manuel Barange, Director of Aquaculture and Fisheries at the Food and Agriculture Organization (UN FAO)

”

An extra 16 million tonnes of wild seafood could be harvested each year if global fisheries were better managed, meeting the protein needs of an additional 72 million people, while also significantly reducing iron and vitamin deficiencies.

Setting a course for 2030



Our new strategic plan sets out how we will work with our partners to meet the challenges of the coming decade.

The newly launched Integrated Strategic Plan sets out our ambitions and priorities between now and 2030, and how we plan to work with our partners to make vital progress on ending overfishing.

Our vision remains unchanged: we want to see the world's oceans teeming with life, and seafood supplies safeguarded for this and future generations. Sustainable

fisheries help to underpin healthy and productive ocean ecosystems, as well as supporting millions of livelihoods globally. Our goal for 2030 is for over one-third of global landings to come from MSC certified or engaged fisheries.

Our new strategy sharpens the focus on the fisheries, species and markets where our engagement will have the greatest impact. We will help identify new market opportunities for valued partners, as well as supporting fisheries to improve their sustainability practices. Through the Ocean Stewardship Fund, we will provide grants to fisheries

making progress towards sustainability and working to transition to our revised Fisheries Standard as well as funding for important research that will generate new knowledge and understanding.

We are also increasing our efforts to engage with and build support amongst stakeholders including governments, environmental NGOs and scientists. And we plan to deliver consumer campaigns to raise awareness and understanding of the positive impact that the public can have by supporting seafood with the MSC ecolabel.



The revised MSC Fisheries Standard

Our revised Fisheries Standard sets a new global benchmark for sustainable fishing.

The release of the revised Standard follows the most extensive review of marine science and fisheries best practice that we've ever undertaken, during which we reviewed more than 600 submissions from the fishing industry, supply chain companies, fisheries, scientists and environmental NGOs.

The revised Standard includes new requirements to strengthen protection of endangered, threatened and protected species, ensure impacts on habitats are assessed accurately and consistently, and improve international management of shared

fish stocks. At the same time, we have clarified language, refined existing tools, and developed new guidance to ensure our Standard can be applied efficiently. To support fisheries and stakeholders in adapting to the changes, we are offering a full program of training and guidance.

We are hugely grateful for the commitment, insights and expertise of all those who have contributed to the revision of the Standard.

What's new?

Greater protection for endangered, threatened and protected species

The Standard introduces a new approach to reduce impacts on a wider range of endangered, threatened and protected species, and help affected populations to recover.

Preventing shark finning

Shark finning is already forbidden in MSC certified fisheries, but to strengthen this further, all fisheries that retain sharks must have a "fins naturally attached" policy in place, with no exceptions.

Tackling ghost gear

Fisheries must have effective measures in place to minimise gear loss and mitigate the impact of any lost gear.

Strengthening harvest strategies

Fisheries managed by regional fisheries management organisations, including those targeting tuna, will need to develop and implement effective stock-wide harvest strategies.

Improving evidence

New requirements will ensure that assessors use high-quality evidence to score fisheries, while our updated risk-based framework will support assessment of data-limited fisheries.

“

The revised MSC Fisheries Standard provides a global benchmark to drive forward real and lasting change in the way our oceans are fished by recognising fisheries that are, and incentivising other fisheries to become, world leaders in sustainability.

Dr Rohan Currey, Chief Science and Standards Officer, MSC

”



Progress on the water

MSC continues to enjoy strong market momentum, with a healthy number of fisheries engaged in the program.

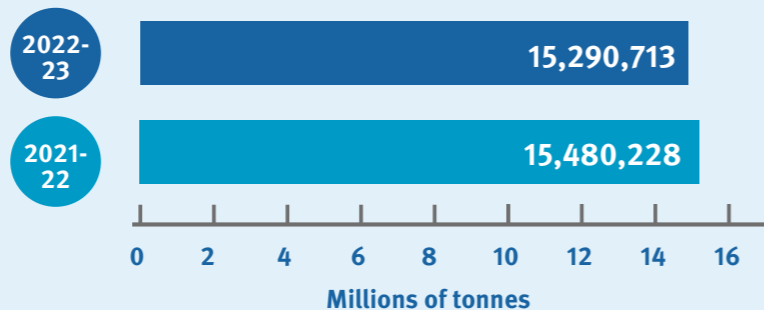
Number of fisheries engaged in the MSC program



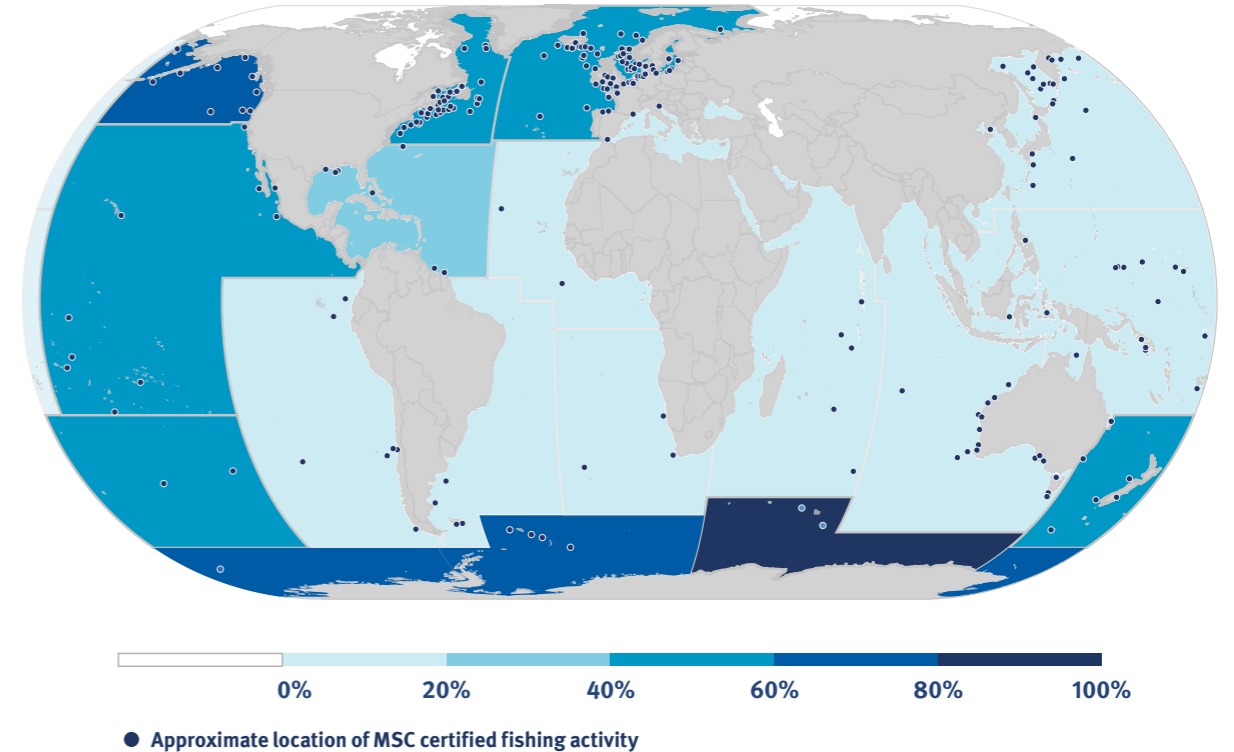
19% of all wild marine catch was engaged with the MSC*



MSC engaged catch remained above 15 million tonnes



Where MSC certified fisheries operate



550 fisheries are certified

17 fisheries are suspended

90 more are in assessment

17 more are in-transition to MSC



66 Countries engaged in the MSC program

*MSC certified, in assessment, suspended, and in-transition to MSC marine catch and fishery data as of 31 March 2023, compared with total marine catch for UN FAO Major Fishing Areas in 2021.

The above map shows the percentage of catch from MSC certified fisheries per UN FAO Major Fishing Area.

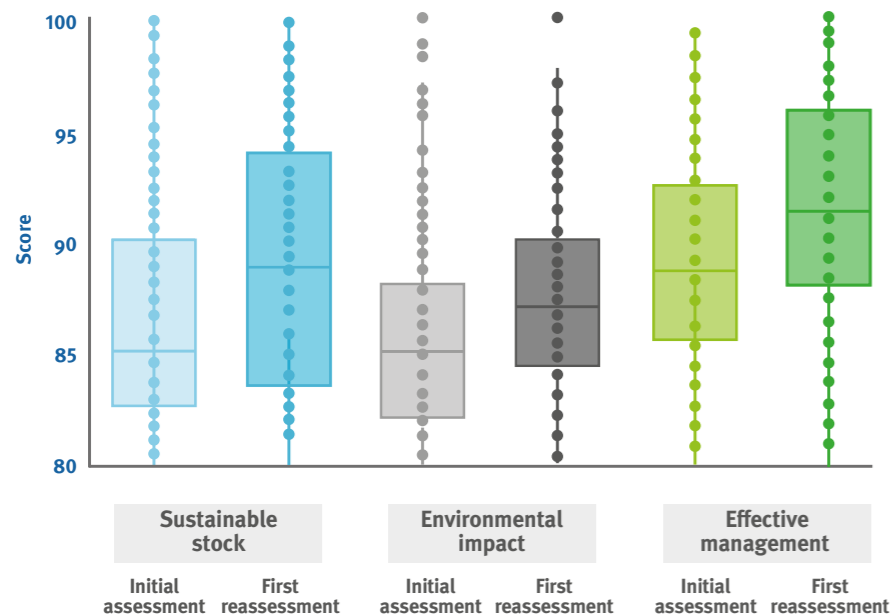
Delivering impact

MSC certification drives improvements in fisheries management and the marine environment.

To achieve and maintain MSC certification, a fishery must demonstrate that it meets global best practice by scoring an average of 80 out of 100 against each of our three principles: sustainability of the stock, ecosystem impacts and effective management.

Many fisheries will make significant improvements before they enter full assessment against the MSC Standard. But becoming certified isn't the end of the story: where there is a condition of certification, fisheries will need to make specific improvements within a set timeframe in order to stay in the program. Over the last 25 years, MSC certified fisheries have made more than 2,000 improvements this way – with outcomes ranging from reduced bycatch and impacts on threatened species, to stronger fisheries regulations and new scientific knowledge.

The graph below shows the distribution of scores for all currently certified fisheries that have completed at least two full assessments to the MSC Fisheries Standard.



2,225
improvements made by
MSC certified fisheries up to
31 March 2023

**437 improvements over
the last three years,
consisting of:**

 **166**

improvements benefitting endangered, threatened and protected species, and reducing bycatch

 **117**

improvements benefitting stock status and harvest strategies

 **74**

improvements benefitting fishery management, governance and policy

 **80**

improvements benefitting ecosystems and habitats

Saving stingrays in the Mediterranean

The certification of the SATHOAN French Mediterranean bluefin tuna artisanal longline and handline fishery in 2020 was the result of impressive efforts to rebuild bluefin tuna populations. Now, as a condition of certification, the fishery is taking steps to better understand its impacts on bycatch species and pelagic stingrays, which are vulnerable because they grow and reproduce slowly. A grant from the Ocean Stewardship Fund is supporting the fishery's RAYVIVAL project, which is tagging 38 stingrays to monitor their survival after release, and uncover more information about their ecology and biology.

Minimising seabird bycatch

Since it was first certified in 2012, the Argentine hoki bottom and mid-water trawl fishery has reduced the number of seabirds accidentally killed in collisions with the cables that tow its nets. Now, with an Ocean Stewardship Fund grant, the fishery is working with partners including the Aves Argentinas albatross task force to reduce seabird mortality further – focusing specifically on preventing albatrosses and giant petrels from getting entangled with fishing wire. The project is working closely with fishers to test and evaluate ways of adapting their gear, and the results will be shared widely with similar fisheries.



“ We have been working with a certified fishery since 2012 and the MSC certification has allowed us to achieve a spirit of collaboration and understanding between the different actors – which can be difficult to achieve in other fisheries. In terms of species conservation, working in a certified fishery means we can gather results more efficiently.

Mr Leandro L. Tamini, Marine Program Coordinator, Aves Argentinas

Mitigating seabird interactions in Argentine hoki fishery © Leandro Tamini

Anchored in science

Our collaborations with scientists and research institutions around the world are helping to unlock new insights, improve our understanding of ocean ecosystems and strengthen sustainable fishing practices.

More abundant fish stocks in certified fisheries

Fish stocks targeted by MSC certified fisheries perform better against key sustainability criteria than those targeted by fisheries without certification according to new MSC research published in the peer-reviewed journal *Frontiers in Marine Science*. In the most comprehensive comparison to date, fish stocks targeted by MSC certified fisheries were found to be more consistently fished within sustainable limits and to have greater abundance relative to sustainable harvest targets compared with stocks fished by non-MSC-certified fisheries. The research covered a large range of species, including tuna, small pelagic fish and whitefish, and geographic areas.

Climate adaptation in fisheries management

Climate change is already having significant impacts on fish stocks and ecosystems, posing new management challenges. Many fish populations are moving towards the poles or to deeper waters, and may be expanding or contracting. This can lead to fishery closures or stocks being overfished if neighbouring countries that previously had sharing agreements no longer recognise each other's rights as fish stocks shift across jurisdictions.

To understand better how these issues will impact sustainable seafood and the ability of fisheries to meet our sustainability benchmarks, the MSC is conducting a global research project, "Assessment of Risks posed by Climate Change (ARC)".

To identify potential solutions at a regional level, we're also working with research partners in the US to investigate feasible policies to allocate quotas fairly and sustainably as stocks shift across state boundaries. The research focuses on US Mid-Atlantic stocks, but may provide a replicable approach to adaptive management for other fisheries experiencing rapid changes.



Tools for data-limited fisheries

Some sustainably managed fisheries may lack the data needed for conventional stock assessments. Data-limited fisheries occur everywhere in the world, though smaller-scale fisheries and those in low or middle income economies are the most common.

We've developed various tools and approaches to help these data-limited fisheries towards meeting the certification requirements. The latest innovation is the Method Evaluation and Risk Assessment (MERA) app – a user-friendly simulation tool that will help practitioners select the most effective management strategies to take, even with limited data. The open-source tool can be used to test more than 100 fishery management procedures, identify the most robust approach given the available data and fishery characteristics, and prioritise data to collect that will improve performance in the future.

Climate change is already having significant impacts on fish stocks and ecosystems, posing new management challenges.

Supporting transformation in global fisheries

Enabling more fisheries in developing economies to improve their environmental performance and adopt sustainable fishing management practices will strengthen food security and enhance livelihoods.



Ending overfishing and maintaining ocean ecosystems is a global challenge – but it’s especially urgent in developing economies. Millions of people depend on fishing for their livelihoods and food security, with small-scale fisheries, predominantly in developing countries, supplying around 40% of the global catch and more than 90% of jobs in the sector. With fish stocks coming under ever greater pressure, it’s vital that people have the tools to manage them sustainably and are rewarded for doing so.

In-Transition to MSC

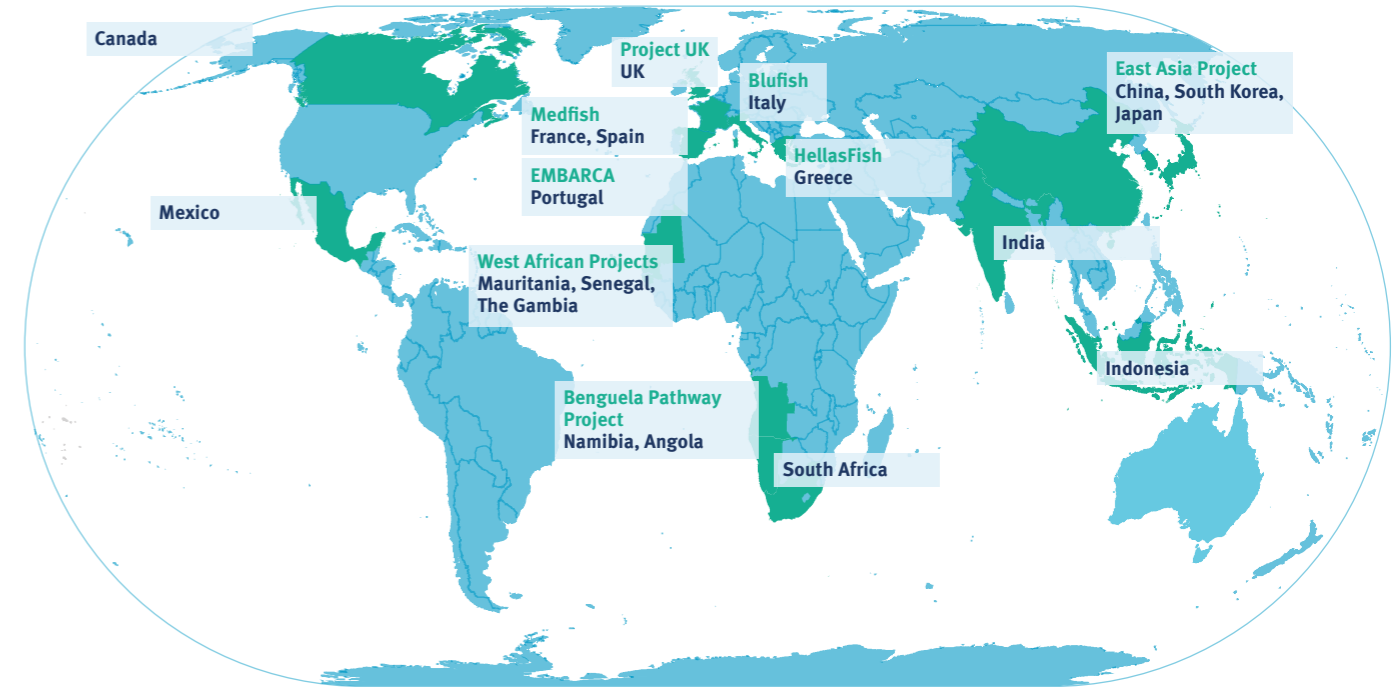
Our In-Transition to MSC pilot program supports fisheries that are committed to achieving certification against our Fisheries Standard. An independent auditor regularly verifies the progress of fisheries taking part, enabling them to measure their performance and demonstrate the credibility of their commitment through tangible and continuous improvement. As part of our new Integrated Strategic Plan, we are exploring market-based incentives and other support mechanisms to make our In-Transition to MSC program more effective and accessible.

“ To safeguard seafood supplies and conserve ocean ecosystems, our goal is for over a third of global seafood catch to be engaged in the MSC program by 2030. This means recognising and rewarding sustainable fisheries and incentivising improvement globally, not least in developing economies where fishing is crucial to food and livelihood security.

Ernesto Jardim, MSC Fisheries Standards Director

”

Fishing boats in Hout Bay, South Africa © Jaco Barendse/MSC



14
Pathway
Projects

17
fisheries In-Transition
to MSC

19
countries involved
in Pathway Projects

56
fisheries implementing
action plans

Pathway Projects

Pathway Projects bring together multiple partners – including governments, fishers, seafood businesses, retailers, NGOs and donors – to create the enabling conditions to support fisheries on their sustainability journey. We offer tools, training and a framework to guide fisheries to improve their performance against the principles of the MSC Fisheries Standard, as well as increasing access to funding for this work. We’re currently involved in running 14 Pathway Projects in 19 countries, from the UK to the Mediterranean to the Indian Ocean, involving a wide range of species and gear types.

Scaling impact: MSC's Ocean Stewardship Fund

We aim to mobilise US\$100 million over the next 10 years to support sustainable fishing.

More than 100 grants worth almost US\$5 million have been awarded from our Ocean Stewardship Fund over the last four years. These funds support a wide range of fisheries and invest in research and innovation to improve fishing practices on the water.

The latest round of funding delivered 26 grants worth US\$934,430 to fisheries, NGOs, researchers and other partners in 15 countries. Some 40% of the grants were awarded to fisheries in emerging economies, including South Africa and Mexico.

Since 2018, we've allocated 5% of the annual royalties generated from the sale of MSC certified and labelled products to the Ocean Stewardship Fund. In addition, since seeking to expand the Fund through third-party donations in collaboration with environmental investment advisers Clarmondial, we've received nearly US\$3 million in additional funds from the MAVA Foundation and Hans Wilsford Foundation, as well as from the Walton Family Foundation for a loan guarantee facility.

So far, the Fund has mobilised US\$10 million through MSC label royalties and third-party donations. But in the decade ahead, we're aiming to scale up this impact significantly. In 2023, we announced an ambitious goal to raise US\$100 million over the next 10 years – and invited philanthropic organisations, governments and businesses to contribute.

“

Identifying cost-effective solutions to reduce impacts of fishing on endangered, threatened and protected species (ETP) species will have positive benefits for populations in the Northern prawn fishery and potentially other fisheries which impact on ETP sawfish and sea snake species through knowledge sharing.

Ms Annie Jarrett, CEO, Northern Prawn Fishery Industry Pty Ltd.

”

In the last four years
100+
grants were awarded

worth almost
**US\$5
million**

26
grants in the latest
round of funding

US\$934,430

to fisheries, NGOs,
researchers and other
partners in 15 countries

40%
of the grants were
awarded to fisheries in
emerging economies

Shoal of bigeye trevally © Getty Images

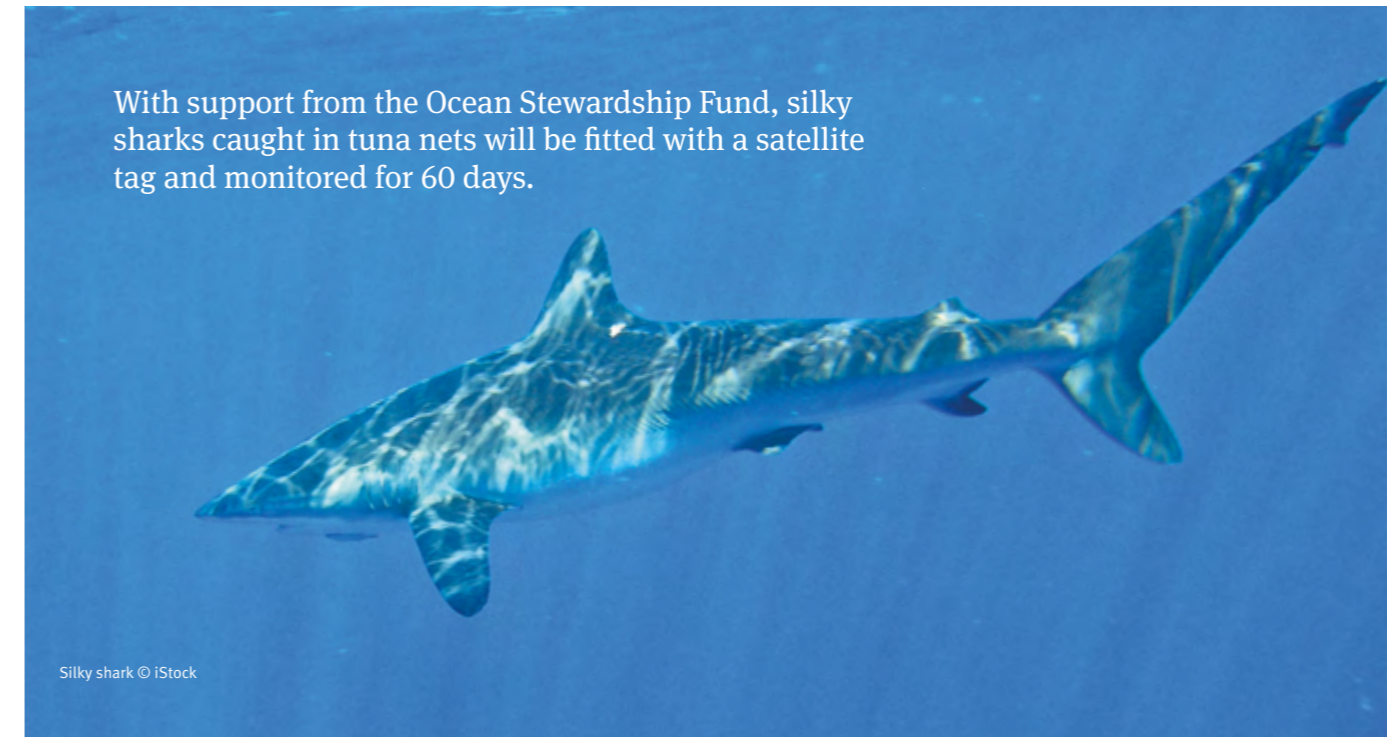
Tagging silky sharks to identify post-release survival rates

Silky shark bycatch occurs in tropical tuna purse seine fisheries worldwide. In the Eastern Pacific Ocean tropical tuna fishery, 70% of silky sharks are released alive, but their survival rate is unknown. With support from the Ocean Stewardship Fund, silky sharks caught in tuna nets will be fitted with a satellite tag and monitored for 60 days. Scientists from the Inter-American Tropical Tuna Commission will examine the data to estimate survival rates and identify factors that may influence whether a shark is likely to survive. This could help develop more effective handling and release practices, reducing silky shark mortality rates.

Reducing turtle bycatch in Réunion

Ocean Stewardship Fund support is helping coastal longline swordfish fishers from the Indian Ocean island of Réunion to reduce bycatch and improve survival rates for marine turtles. Fishers have received training on identifying, handling and releasing turtles, and are being equipped with onboard turtle handling kits – including a prototype net/spinner designed to remove caught turtles from the water with care, without pulling on lines or hooks. Turtles with hooks that cannot be removed on board are transported to a veterinary rehabilitation centre, where the survival rate is an estimated 80%. To date, this collaboration between fishers and scientists has saved more than 400 turtles.

See page 13 for more improvement projects supported by the Ocean Stewardship Fund



With support from the Ocean Stewardship Fund, silky sharks caught in tuna nets will be fitted with a satellite tag and monitored for 60 days.

Silky shark © iStock

Market momentum

By growing the market for certified seafood, our corporate partners are incentivising sustainable fishing and enabling responsible consumption.

While the year saw continued growing commitment to sustainable seafood from retailers and seafood brands throughout the world, Southern Europe, Japan and the USA have all seen a step change in commitments from commercial partners.

Southern Europe

In France, sales of MSC certified seafood have doubled over the past five years. Along with long-standing partners like **Carrefour**, new retailers have been joining the program: **E.Leclerc** and **Aldi** now offer a wide range of MSC certified products with increased volume and products bearing the blue MSC label. **Fleury Michon**, the country's leading chilled surimi brand, has added the MSC label to a significant volume of surimi products over the past year.

In Italy, **Bolton Food** has been leading dramatic growth in the sustainable tuna market through its brand **Rio Mare**, aiming to source only from MSC certified fisheries or credible and comprehensive fishery improvement projects by 2024. Overall, MSC private label products are performing well and have reached 30% of total MSC volume sold in Italy. **Lidl**, **Eurospin** and **Conad** are the top three.

In Spain, **El Corte Ingles** is the latest retailer to achieve MSC chain of custody certification for its fresh fish counters, joining **Eroski** and **Makro**. Retailers **Dia** and **La Sirena** made great strides by releasing 30 and 25 MSC products in their stores respectively, and **Alcampo** became the first Spanish retailer to launch an own-brand skipjack canned tuna product with the MSC blue label.

In Portugal, several retailers increased their offer of own-brand products with the MSC label. Market leader **Lidl** now has 79 MSC certified private label products and **Continente** has 45, while **Aldi** launched the first own-brand canned tuna product with the MSC label for the Portuguese market. Seafood brands **Iglo** and **Riberlves** each also offer over 50 MSC labelled products.

France, Italy, Spain and Portugal account for more than half of seafood consumption in the EU.



© Bolton Food

Japan

Since 2020, the number of MSC labelled products has increased by 30% to over 700 in Japan. **Aeon** and the **Japanese Consumers' Cooperative Union (JCCU)** are leading the market for MSC labelled products. The largest retailer in Japan, **Seven & I holdings**, is gradually increasing the number of products in its private brand, **Seven Premium**, that use the MSC label, and achieved chain of custody certification in October 2022, which encompasses its group retailers such as **Ito Yokado**. Major seafood brand **Nissui** also increased its number and volume of MSC labelled products.

United States

Despite over 80% of US landings being certified, the US market and consumers have been slower to demand certified and ecolabelled seafood. But this is beginning to change: the US is now one of the fastest-growing markets for MSC certified and labelled seafood. MSC certified seafood sales have doubled over the past five years, and over 100 new MSC labelled products hit the US market last year alone. Long-term partners including **Bumble Bee** and **Whole Foods** have led the way, with **North Coast Seafoods** also adding new MSC certified pet food lines and expanding its frozen range. Our new retail partner **Meijer** rolled out MSC labelled seafood across over 240 stores in the Midwest. **Safe Catch** also announced a partnership with the MSC and has committed to selling 100% MSC labelled tuna and salmon products.

Whole 365 Cod Fillets © MSC



MSC labelled sales remain buoyant

Sales of certified seafood are holding up strongly in a challenging climate in spite of economic headwinds.

In spite of the challenges around COVID-19 and the ongoing cost of living crisis, sales of MSC labelled seafood remain strong. There are now over 20,000 labelled products on shelves in 66 countries globally, representing more than 1.2 million tonnes or US\$12.4 billion in retail sales value.

Other categories such as surimi, ready meals and pet food have performed well too, but the chilled sector is down and many fresh fish counters closed as a result of the COVID pandemic.

At the regional level, we are seeing very strong growth in North America and Southern Europe as well as Central Europe and China. However in some Northern European markets, despite strong growth in tuna labelling, sales have plateaued or declined following the suspension of major European herring fisheries.

As with the entire seafood sector, rapid food-price inflation and competition from other proteins affected the sales of MSC labelled seafood over the last year. Volume declined by 2% but wholesale value grew by 11.5%.

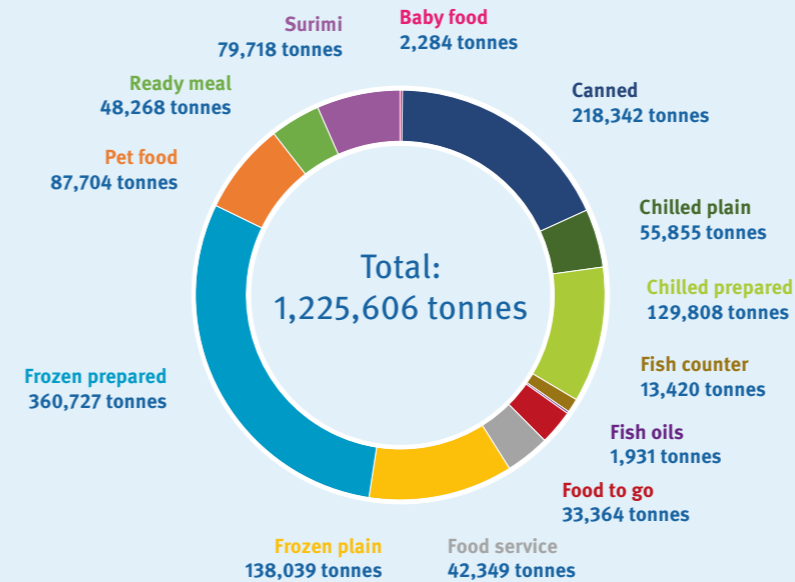
Canned seafood has been one of the fastest-growing categories this year, thanks mainly to growth in tuna.

The MSC and Russia

MSC certified fisheries in Russia are major suppliers of seafood to the international market. The MSC has condemned the invasion of Ukraine by Russia and, like many organisations, has been grappling with how best to respond. Our Board of Trustees decided in March 2022 that there will be no new activity in Russia, although existing certificates will be maintained subject to extra due diligence. All certified entities in Russia must demonstrate their compliance with international sanctions. A 2022 review by Assurance Services International (ASI) confirmed that independent assessment bodies were able to uphold the requirements of the program, but this is being kept under constant review by the MSC, the assessment bodies and ASI. We also made the decision to end all market and consumer-facing activity in Russia.



Volume sold by product type 2022/23

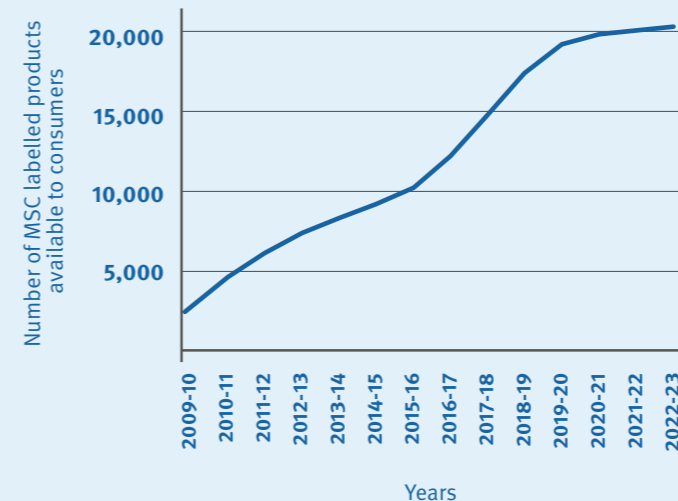


Largest percentage growth by product type:

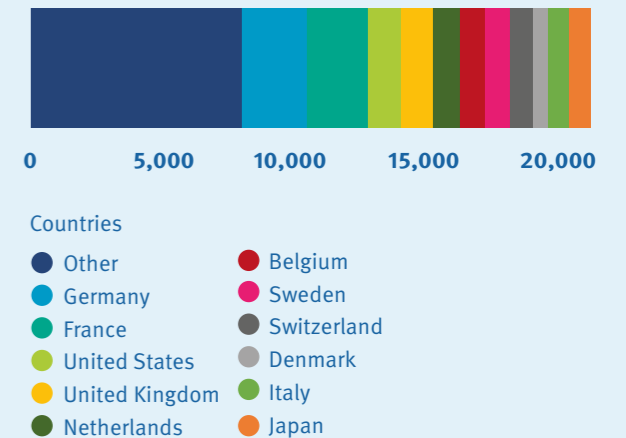
- +186% Baby food
- +16% Ready meals
- +14% Surimi
- +12% Canned

MSC labelled consumer products

Steady growth from 2009-2023



MSC labelled consumer products by country 2022/23



Consumer awareness

We're working with partners to raise awareness of the importance of sustainable fishing and build demand for MSC certified seafood.

Our **Ocean Cookbook 2023** showcased sustainable seafood recipes from our global network of chef ambassadors – from Korean cod boribap to Italian spaghetti with clams. This year, we worked with award-winning food photographer David Loftus to capture the colour and variety of seafood in the recipes, celebrating the vibrancy and naturalness of the healthy diet that the ocean can provide.

Our **World Ocean Day** campaign, delivered in 23 countries, aimed to grow our movement for a #BigBlueFuture. We released a selection of six stories highlighting unexpected and innovative ways in which fisheries meet the MSC Fisheries Standard, and the science behind sustainable fishing. There were 7.7 million views of our campaign videos

and 147 commercial partners joined the campaign, including through in-store materials and social media, along with 45 other institutions and 65 MSC ambassadors and influencers.

In Japan, we held a **poetry contest** to celebrate World Ocean Day, inviting people to write a tanka, a traditional short five-line poem, celebrating MSC certified fisheries or seafood. The competition attracted 1,764 entries, with the prize-winning tankas being selected by MSC Ambassador Naoki Tanaka and the MSC's partners.

Our **Check Your Fish** campaign in Austria, Germany and Switzerland, run in conjunction with the ASC, aimed to raise awareness of and trust in the MSC and ASC labels. Some of the biggest

retailers across the three markets got involved, along with seafood brands, suppliers, food service companies and zoos. In Germany, more than one in five people said they remembered the campaign when prompted, and there was a noticeable increase in the proportion of consumers who said they trusted the MSC label.

In the US, the **Little Labels, Big Impact** campaign in January 2023 brought MSC together with two other certification schemes, the Non-GMO Project and Fairtrade America. Our shared aim was to raise consumer awareness of third-party certification and the impacts that ecolabels like ours can have for sustainable food systems.



Ocean Cookbook 2023



Naoki Tanaka and a tanka



World Ocean Day campaign 2022

For **Sustainable Seafood Week in the UK and Ireland**, we celebrated homegrown sustainable seafood and fishing communities around the British Isles. We ran our first-ever MSC UK produced TV advert which featured MSC certified Scottish fisheries, reaching 3.2 million viewers. Our chef ambassadors James Strawbridge and Mitch Tonks rustled up delicious recipes on location in cooking videos, in the Shetland Islands in the far north of Scotland and in Devon, southern England respectively.

In Italy, the second annual Sustainable Seafood Week campaign, **'We're all in the same boat'**, in October and November 2022 mobilised a range of commercial partners to raise awareness of the blue MSC label. The campaign highlight was a live event that explored the effects of climate change on the oceans, as well as progress in sustainable fishing and seafood markets. We were proud to galvanise the support of 18 partners including the biggest seafood industry players in Italy, and reach an estimated 12 million people through press coverage.



Sustainable Seafood Week campaign, UK © MSC

Whitefish

Every day, millions of people all over the world are able to enjoy whitefish products bearing the MSC ecolabel. Pollock and cod are the top two MSC labelled species, with hake and haddock also featuring in the top 10. Worldwide around 75% of all whitefish is caught by fisheries engaged in the MSC program, and the market value continues to grow. We are proud to partner with some of the best-managed whitefish fisheries in the world.



Nomad's progress

Oliver Spring, Group Sustainability Manager at Nomad Foods, the owner of Birds Eye, Findus and iglo, shares insights about the group's sustainable sourcing commitments.

Nomad Foods is committed to sourcing 100% of its seafood from certified sustainable fisheries by 2025. Why is this important?

Our brands have been at the heart of family life for generations. We want them to be favourites for generations to come. As the world's population increases and consumer demand for seafood continues to rise, the role we play in promoting sustainable fishing is critical and fundamental for the long-term resilience and growth of our business.

What progress have you made this year?

We are the world's largest buyer of MSC certified wild-caught whitefish, with 99.0% of our wild capture fish and seafood coming from certified fisheries. This was in part due to improvements in our Belgian, Portuguese and Finnish markets this year, with 100% of the fish and seafood products in our iglo Belgium, iglo Portugal and Findus Finland portfolios now carrying the MSC label.

What role can a company like Nomad Foods play in incentivising sustainable fishing and improvements on the water?

While our number one priority is to source certified fish and seafood wherever possible, we are also proud of our work supporting non-certified fisheries on their certification journey. As recently as 2020, following years of support from Nomad Foods and others, the Namibian hake trawl and longline fishery became only the second fishery in Africa to achieve MSC certification. It now provides up to 160,000 tonnes of sustainable hake into seafood supply chains and sends a strong signal to the whole of the continent about what's possible.

Now that you've almost met your commitment, do you need to keep up your support?

We remain committed to growing the global network of certified fisheries – we have been working with Argentinian hake fisheries, for example. Having more certified fisheries helps us develop and diversify our portfolio, and manage risks from climate change. We also work closely with certified fisheries to track progress they are making to maintain their sustainable performance.



Hake improvements

MSC certification has brought significant market benefits to South Africa's hake trawl fishery – first certified in 2004 – and Namibia's hake fishery, certified in 2020, as well as driving a number of management improvements. Now, the South African longline hake fishery has embarked on its journey toward certification by entering our In-Transition to MSC pilot program.

A grant from our Ocean Stewardship Fund is enabling the fishery to make several environmental improvements through training and awareness-raising. Among other things, this aims to improve handling and release of endangered, threatened or protected species, especially seabirds, and to map and mitigate potential impacts on vulnerable marine ecosystems.

In numbers...

6,412,000

tonnes MSC engaged catch*

75%

of global wild whitefish catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes)

2022-23 | 567,828

2021-22 | 603,144



201

MSC engaged fisheries

155

improvements made over the last three years by certified fisheries

93

Endangered, threatened and protected species and bycatch

16

Stock status and harvest strategy

44

Ecosystems and habitats

2

Fishery management, governance and policy

Small pelagics

Small pelagic species make up a quarter of the world’s fish catch, and play a vital role in marine food webs. Nearly 15% of the global small pelagic catch comes from fisheries engaged in the MSC program.

North East Atlantic: still no agreement

Disappointment continues as coastal states in the North East Atlantic once again failed to agree a quota share arrangement on Atlantic mackerel, Atlanto-Scandian herring and blue whiting. As a result, fishing nations harvesting these stocks have set individual quotas that, when combined, far exceed scientific advice. Due to the lack of effective international management, these fisheries had their MSC certification suspended in 2019 and 2020.

This continued political failure raises the risk of stocks collapsing, which would be hugely harmful to the marine environment, the fishing industry and the seafood market. We’ve been pressing government delegations to reach a solution, along with businesses committed to certified sustainable seafood. The North East Atlantic Pelagic Advocacy Group (NAPA), a coalition of more than 60 retailers, food service companies and suppliers, has been running two advocacy and policy-based fishery improvement projects calling on governments to agree sustainable catch shares, follow the science and commit to long-term management. But if a deal isn’t reached, many members have warned they will stop sourcing from these fisheries.



Cornish sardines © David Loftus/MSC

Cornish sardines

Recertified for a second time in August 2022, the Cornwall sardine fishery is now the only source of MSC certified sustainable sardines in Europe after other fisheries were suspended or withdrew from the program. The fishery consists of 15 small vessels catching sardines (European pilchard) using ring nets, with minimal bycatch.

Also in 2022, Tesco launched its own-label canned Cornish sardines bearing the MSC label – the first time a UK retailer has sold canned Cornish sardines under its own brand. The supermarket sources from the Cornish Sardine Management Association, whose members fish and process almost all the sardines caught in the UK. The sardines are canned in the UK’s only cannery, International Fish Cannery in Aberdeenshire.

Maintaining MSC certification is also boosting exports, as the fishery increasingly supplies large canneries in Spain and Portugal. Around 50 MSC labelled Cornish sardine products are now available in a dozen countries.

“ We’re proud to be the only supplier of MSC certified sardines in Europe. Sardines have been fished off the coast of Cornwall for hundreds of years, and we want our sustainable fishing tradition to continue for future generations.

Gus Caslake, Cornish Sardine Management Association

”

The Southern Gulf of California thread herring fishery and the small pelagics fishery in Sonora, both of which are located in Mexico, were recertified this year with catch volumes of over 500,000 tonnes.

In numbers...

3,868,000

tonnes MSC engaged catch*

15%

of global wild small pelagic catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes)***

2022-23 | 98,859

2021-22 | 137,688



42

MSC engaged fisheries

66

improvements made over the last three years by certified fisheries

13

Endangered, threatened and protected species and bycatch

27

Stock status and harvest strategy

8

Ecosystems and habitats

18

Fishery management, governance and policy

*Engaged means certified, in assessment, in-transition to MSC, or suspended
 **As per UN FAO data, 2021
 ***Eco-labelled products aimed at consumers make up only a small proportion of the total catch, most of which is used for fishmeal/oil
 As the data methodology has changed from previous reports, the species numbers are not directly comparable.

Tuna

With 14 new fisheries certified this year and 56 in assessment, tuna has never been more prominent in the MSC program. The volume of tuna products sold with the MSC ecolabel has almost tripled in the last five years.

Can of tuna © milosljubic



Progress in international management

Tuna are highly migratory fish, so sustainable management requires international cooperation beyond the efforts of individual fisheries and management agencies.

This year saw significant progress in both the Atlantic and Pacific oceans. In November 2022, the International Commission for Conservation of Atlantic Tuna agreed to adopt state-of-the-art harvest control measures to safeguard Atlantic bluefin tuna stocks. This marks a major departure from the annual quota negotiations that allowed bluefin tuna to be overfished to the verge of collapse by the early years of this century. With the Western Atlantic stock recovered, in September 2022 a small-scale fishery in the south of Spain, JC Mackintosh, became the third bluefin tuna fishery to achieve MSC certification.

In December 2022, the 26 member nations of the Western Central Pacific Fisheries Commission (WCPFC) reached a breakthrough agreement to adopt a harvest strategy for skipjack – the most abundant tuna species and the largest tuna fishery on Earth – and reaffirmed its commitment to introduce harvest strategies for all tuna species. This is a big win for the region’s certified tuna fisheries, which account for 80% of

MSC certified tuna – but which risked losing their MSC status if the WCPFC failed to reach an agreement.

In a global first, the Spanish tuna association AGAC-OPAGAC achieved certification for tuna in four ocean regions: yellowfin in the Eastern Pacific, yellowfin, skipjack and bigeye in the Western Pacific, yellowfin in the Atlantic and skipjack in the Indian Ocean. The certificate includes 60 purse seiners and a total volume of around 188,000 tonnes.



AGAC, MSC Spain and Lloyds Register representatives with Teresa Ribera, Vice President and Minister of Ecological Transition and Demographic Challenge and Alicia Villauriz, General Secretary of Fisheries © Neo Estudio/MSC

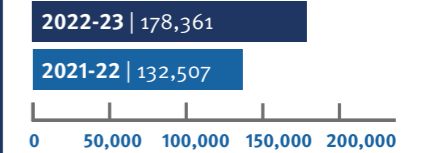
In numbers...

2,622,000

tonnes MSC engaged catch*

53%

of global wild tuna catch from MSC engaged fisheries**



159

MSC engaged fisheries

50

improvements made over the 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

Ecuador celebrates tuna milestone

Ecuador is the world’s second-largest tuna producer, landing around 300,000 tonnes each year, so the certification of the first Ecuadorian tuna fishery in July 2022 was a significant milestone.

It’s the result of years of hard work by the companies that make up TUNACONS – Nirsa, Eurofish and Servigrup from Ecuador, Grupo Jadran from Panama and US-based Tri Marine. Formed in 2016, TUNACONS has been working with WWF to bring its operations up to the MSC Standard, including by developing biodegradable fish aggregating devices (FADs) and reducing bycatch.

The certification covers 47 purse-seine vessels catching yellowfin tuna in the Eastern Pacific, but the companies are hoping to achieve certification for skipjack and bigeye soon. And others could soon be joining them, with three other companies aiming to become TUNACONS members and working on action plans to meet the MSC Standard.

A second tuna fishery in the country – the Eastern Pacific purse seine yellowfin tuna fishery – also achieved certification this year, and is aiming to expand its scope to include skipjack.

“

We are very proud that our yellowfin is now certified, and it motivates us to achieve certification for other tuna species. This achievement is a cause of celebration not just for TUNACONS nor Ecuador, but also for the entire region as it is the biggest fleet to achieve MSC certification on this side of the Pacific.

Guillermo Morán Velásquez, Director General of TUNACONS

”

* Engaged means certified, in assessment, in-transition to MSC, or suspended

**As per UN FAO data, 2021

As the data methodology has changed from previous reports, the species numbers are not directly comparable.



Squid

Squid are important both as food for human consumption and as prey for other marine species. Healthy squid populations are also vital to a healthy ocean. As of the end of March 2023, certified squid comes from just two species in the US Northeast, but these trailblazing fisheries have helped to establish a market for MSC labelled squid, with over 80 products sold in at least 18 countries last year. The supply of MSC certified squid could soon grow, however: two more species entered full assessment this year – one in California and one in the Falkland Islands – while the Indonesian Medan squid handline fishery is part of our In-Transition to MSC pilot program. Our Fisheries Standard review also clarified methods for

determining sustainable harvest levels for species such as squid that have fluctuating population levels.

Squid strategies in Kerala

Squid fishers in Kerala, India are receiving support from our Ocean Stewardship Fund as part of a fishery improvement project that aims to achieve MSC certification in the medium term. The funding will help evaluate the most effective management measures for the fishery, which trawls for both cephalopods and shrimp, by using simulation models to test their impact on target stocks and the wider ecosystem. This will help prioritise measures to mitigate any changes from variable environmental conditions to which squid are particularly sensitive.



The MSC stands for protecting the future of oceanic resources and encourages everyone to move towards sustainable use of fish stocks without overexploiting them. I believe the MSC's work in India will help to achieve sustainability soon.

Saranya A Sankar, PhD Researcher, Cochin University of Science and Technology



Squid with peppers and Creole sauce © MSC

In numbers...

116,000

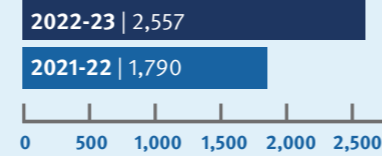
tonnes MSC engaged catch*

4%

of global wild squid catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes)



6

MSC engaged fisheries

1

improvement made over the last three years by certified fisheries

1

Endangered, threatened and protected species and bycatch

*Engaged means certified, in assessment, in-transition to MSC, or suspended
**As per UN FAO data, 2021

As the data methodology has changed from previous reports, the species numbers are not directly comparable.



Octopus

Only two octopus fisheries, in Spain and Australia, have MSC certification to date and one Mexican fishery is in our In-Transition to MSC pilot program. However, there has been growing interest in certified octopus globally. Our MedPath project has supported pre-assessments and developed action plans for four octopus fisheries in the Mediterranean. The project is also developing an open-source app to support stock assessments, which can help set sustainable harvest levels – a key challenge for certification, since octopus populations can fluctuate drastically due to environmental conditions.

Western Australia octopus

Fremantle Octopus, Abrolhos Octopus and South West Octopus are the companies behind the only MSC certified octopus fishery in the southern hemisphere, based in Western Australia. While most octopuses globally are caught using trawl methods, within the fishery Fremantle Octopus has developed its patented Trigger Trap, designed to catch only octopuses. The trap has reduced bycatch to less than 1%, while increasing octopus catch rates by up to 200%. Smaller octopuses are recorded and released, fostering academic research into sea creature populations.



Western Australia leads the world in sustainable fishing practices, and we're proud to play a part in that reputation. Choosing Fremantle Octopus with the MSC blue tick ensures future generations can enjoy the treasures of the ocean.

Glenn Wheeler, Managing Director, Fremantle Octopus



Western Australia octopus fishery © Jason Thomas/MSC

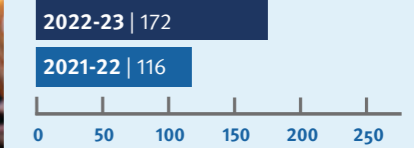
In numbers...

15,312

tonnes MSC engaged catch*



Volume of MSC labelled sales (tonnes)



3

MSC engaged fisheries

3

improvements made over the last three years by certified fisheries

1

Stock status and harvest strategy

2

Fishery management, governance and policy

*Engaged means certified, in assessment, in-transition to MSC, or suspended

As the data methodology has changed from previous reports, the species numbers are not directly comparable.

Crab

From snow crabs in the Barents Sea to king crabs in Patagonia, the range of crab species in the MSC program continues to grow. Along with major players in the cold-water crab sector, we're now starting to see increased engagement from warm-water crab fisheries: the Indonesia Madura Island blue swimmer crab trap and Indonesia Southeast Maluku Evu mud crab fisheries continue to participate in our In-Transition to MSC pilot program with expected completion dates of 2024 and 2025 respectively. The Norway Barents Sea snow crab fishery also entered assessment in 2023.

Pontchartrain Blue Crab: 10 years' commitment

Premium crab supplier Pontchartrain Blue Crab won the 2022 MSC US Ocean Champion Award in recognition of its 10-year commitment to MSC certification, and continued dedication to ocean health. First certified in 2012, the Louisiana-based Pontchartrain blue crab fishery was the first MSC certified fishery in the Gulf of Mexico and the first swimming crab fishery in the MSC program.

“ Pontchartrain Blue Crab is thriving today due to customers like Walmart, Wholefoods and Wegmans who increasingly demand sustainable products, specifically MSC certified seafood. Gary Bauer, owner of Pontchartrain Blue Crab, Inc. ”

Peel Harvey blue swimming crab © MSC

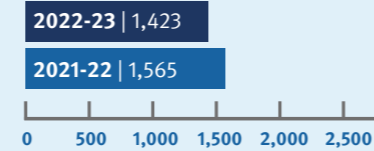
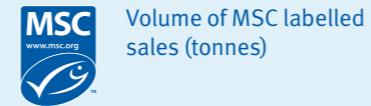
In numbers...

129,000

tonnes MSC engaged catch*

8%

of global wild crab catch from MSC engaged fisheries**



34

MSC engaged fisheries

25

improvements made over the last three years by certified fisheries

11

Endangered, threatened and protected species and bycatch

4

Ecosystems and habitats

6

Stock status and harvest strategy

4

Fishery management, governance and policy

*Engaged means certified, in assessment, in-transition to MSC, or suspended
**As per UN FAO data, 2021

As the data methodology has changed from previous reports, the species numbers are not directly comparable.

Lobster

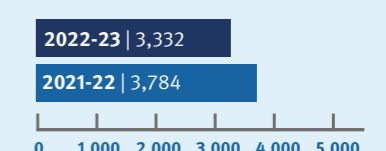
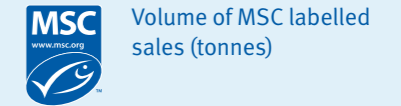
In numbers...

108,000

tonnes MSC engaged catch*

35%

of global wild lobster catch from MSC engaged fisheries**



17

MSC engaged fisheries

16

improvements made over the last three years by certified fisheries

11

Endangered, threatened and protected species and bycatch

2

Fishery management, governance and policy

*Engaged means certified, in assessment, in-transition to MSC, or suspended
**As per UN FAO data, 2021

As the data methodology has changed from previous reports, the species numbers are not directly comparable.

Lobster has been part of the MSC story from the very beginning – ever since Western Australian rock lobster became the first fishery to achieve certification back in 2000. In the Northwest Atlantic, this year saw the suspension and subsequent withdrawal of the iconic Gulf of Maine lobster fishery, but several Canadian lobster fisheries continue to meet the MSC Standard and are working closely with the Canadian government to mitigate the risk of interactions with critically endangered right whales. Measures include extensive at-sea, aerial and acoustic monitoring as well as mandatory gear marking, reporting of lost gear and temporary closures in areas where right whales are seen.

Baja red lobster

Mexico's Baja California red rock lobster fishery was recertified for the third time in August 2022. The fishery was the first emerging economy fishery to be certified to the MSC Standard in 2004. And it could soon be followed by a second red rock lobster fishery in Baja California, which has been making improvements as part of the In-Transition to MSC pilot program. A grant from our Ocean Stewardship Fund is helping to support knowledge sharing between the two fisheries.

“ After nearly two decades in the MSC program, we are very happy to be recertified for a third time. Our success shows that a small-scale fishery from an emerging economy can be a world leader when it comes to sustainability. Mario Ramade, Mexico Baja California red rock lobster fishery ”

European lobster © Tony Fitzsimmons



Salmon

Salmon has been an MSC success story, with 68% of the wild salmon harvest certified to the MSC Standard. And these certified fisheries continue to make improvements: the Alaska salmon fishery is using a grant from our Ocean Stewardship Fund to study potential impacts on two threatened seabirds, the Kittlitz's murrelet and marbled murrelet.

Sustainable salmon on Annette Island

Alaska's Annette Islands Reserve salmon fishery, managed by the Metlakatla Indian Community, was recertified for a second time in 2022. Salmon plays a large role in the life and the culture of Metlakatla: most residents of Alaska's only Indian reserve are involved in the industry, whether fishing or working at the local processing plant where the salmon is smoked, canned and packed. Members of the Metlakatla Indian Community harvest chum, coho, king, sockeye and pink salmon in the waters off Annette Islands. Since first achieving MSC certification in 2011, they have made a number of improvements to ensure the sustainability of the fishery.

“ 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. ”

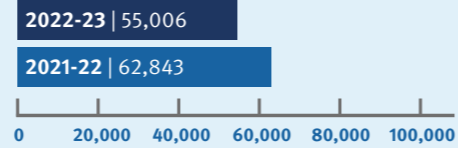
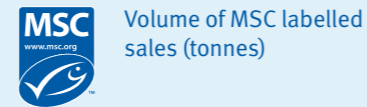
In numbers...

685,000

tonnes MSC engaged catch*

68%

of global wild salmon catch from MSC engaged fisheries**



51

MSC engaged fisheries

42

improvements made over the 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

*Engaged means certified, in assessment, in-transition to MSC, or suspended
**As per UN FAO data, 2021

As the data methodology has changed from previous reports, the species numbers are not directly comparable.



Bivalves and seaweed

As interest grows in the value of aquatic foods for future food security (see page 6), bivalves and seaweed can offer some of the lowest-impact ways to increase food production. Some of these production systems straddle the boundary between wild capture and aquaculture: MSC certification covers both wild and enhanced bivalve fisheries, while our Seaweed Standard has been developed jointly with the Aquaculture Stewardship Council.

Saint-Brieuc coquilles Saint-Jacques

Half a century after overfishing pushed stocks close to collapse, a scallop fishery in Baie de Saint-Brieuc, Brittany, France achieved MSC certification in December 2022. The certification covers 228 licensed vessels with an average length of 11m.

Following a long-term recovery program led by the scallop fishers, and supported by French marine institute Ifremer, scallop stocks have returned to historic levels. The fishery has put strict science-based measures in place to maintain healthy populations, including a closed period, minimum size limits and a maximum catch per boat and per day. Assessors determined that dredging for scallops causes no long-term damage to seabed habitats that are constantly disturbed by storms and currents.

Seaweed in numbers...

54

engaged farms

16,592

tonnes of engaged seaweed harvest

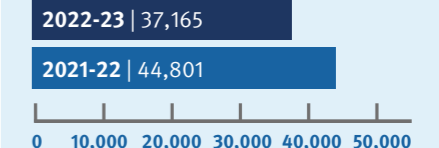
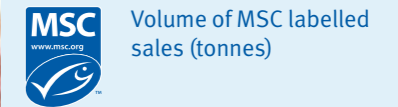
Bivalves in numbers...

915,000

tonnes MSC engaged catch*

37%

of global bivalve catch from MSC engaged fisheries**



48

MSC engaged fisheries

18

improvements made over the last three years by certified fisheries

7

Endangered, threatened and protected species and bycatch

1

Ecosystems and habitats

7

Stock status and harvest strategy

3

Fishery management, governance and policy

*Engaged means certified, in assessment, in-transition to MSC, or suspended
**As per UN FAO data, 2021

As the data methodology has changed from previous reports, the species numbers are not directly comparable.



Prawn and shrimp

Prawns and shrimps of all types are well represented in the MSC program, comprising 35 of the 550 certified fisheries. Engagement with shrimp and prawn fisheries in warmer waters has been slower than in cold-water regions, but we saw a step forward with the commercially significant US Gulf of Mexico shrimp fishery entering assessment.



Courtney Roulston posing as a prawn mermaid for the Peel the Difference Australia Christmas 2022/summer marketing campaign © MSC

In numbers...

334,000

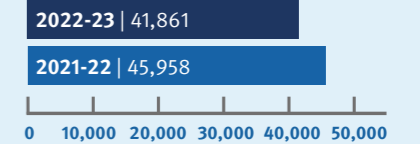
tonnes MSC engaged catch*

11%

of global wild prawn and shrimp catch from MSC engaged fisheries**



Volume of MSC labelled sales (tonnes)



42

MSC engaged fisheries

36

improvements made over the last three years by certified fisheries

10

Endangered, threatened and protected species and bycatch

17

Ecosystems and habitats

6

Stock status and harvest strategy

3

Fishery management, governance and policy

Peel the difference

Our Christmas prawn campaign in Australia urged consumers to “peel the difference” when they choose festive seafood. According to research we commissioned, seven out of 10 Australians consider prawns to be an integral part of their Christmas – about 40% of all prawns consumed in Australia are eaten at Christmastime. But, worryingly, half of the people we surveyed weren’t intending to choose sustainable seafood – even though more than half of the prawns caught in Australian waters come from MSC certified fisheries. In the run-up to Christmas, we joined forces with chefs and commercial partners to put sustainable prawns in the spotlight, sharing mouth-watering recipes and running advertising and educational campaigns. The campaign had an overall reach of 39 million impressions with high levels of engagement, and the campaign videos were watched over 300,000 times.

39 million

impressions with high levels of engagement

300,000

views of the campaign videos

“

Growing up by the Shoalhaven River, I loved fishing, catching crabs and prawning. My dad taught me how to catch dinner in our old tinnie, but we’d only ever take what we needed.

Courtney Roulston, chef and TV presenter

”

*Engaged means certified, in assessment, in-transition to MSC, or suspended
**As per UN FAO data, 2021

As the data methodology has changed from previous reports, the species numbers are not directly comparable.

Our funding and donors

This year we would like to thank the many donors, including trusts, foundations and statutory bodies, from across the globe that have supported our work. In addition to the generous support for MSC’s many projects, we also received significant and new generous grants for our Ocean Stewardship Fund. This has included ongoing support from the MAVA Foundation to help small-scale fisheries in the Mediterranean and West Africa; from the Walton Family Foundation to establish a new loan guarantee facility, enabling fisheries working towards sustainable management practices to access additional financing; and from the Hans Wilsdorf Foundation for the Ocean Stewardship Fund.

We would also like to thank the Dutch Postcode Lottery for its continued core support; the Walton Family Foundation for its continuing generous support for projects around the world;

the David and Lucile Packard Foundation for supporting our work in Japan and facilitating our East Asia Sea Pathway to Sustainability project; the Adessium Foundation for supporting our work in the Mediterranean; the A.G. Leventis Foundation for work in Greece; and the Remmer Foundation for a grant to work with small-scale fisheries in southern Africa. Financial support from the Common Oceans Tuna Project, funded by the Global Environment Facility (GEF) and implemented by UN Food and Agriculture Organization (UN FAO), enabled the MSC to undertake a project on climate change adaptation. Finally, we also continue to receive generous support from the Triad Foundation and Holzer Family Foundation for which we are truly grateful.

We would like to thank the following organisations for their support:

US Foundations

David and Lucile Packard Foundation
Walton Family Foundation
New Venture Fund
Remmer Family Foundation
Triad Foundation
Holzer Family Foundation

European Foundations

Adessium Foundation (Netherlands)
Dutch Postcode Lottery
MAVA Fondation pour la Nature (Switzerland)
Hans Wilsdorf Foundation (Switzerland)

Statutory bodies

MMO (Marine Management Organisation, for Project UK)
GEF via FAO

NGOs

WWF-Sweden
WWF-UK (for Project UK)

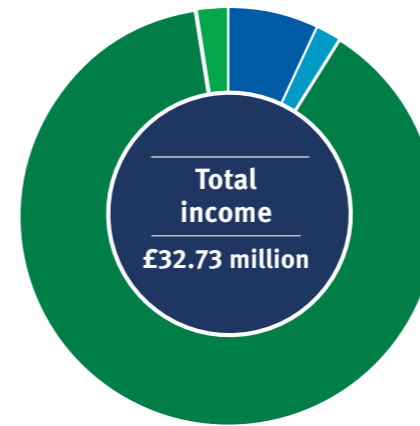
Corporate

Project UK (various)

UK Trusts and Foundations

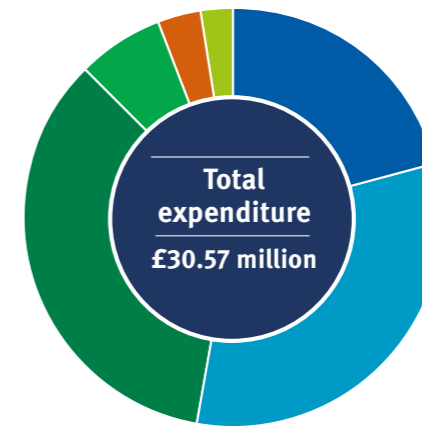
A.G. Leventis Foundation

Our finances 2022-23



Where the money comes from

- 7.0% Donations and legacies
- 1.9% Other trading activities
- 88.7% Income from charitable activities (logo licensing)
- 2.4% Income from investments



Where the money goes to

- 21.0% Policy and maintenance of Standard
- 31.8% Education and awareness
- 34.9% Commercial and fisheries servicing and outreach
- 6.5% Logo licensing
- 3.4% Ocean Stewardship Fund*
- 2.4% Expenditure on raising funds

Total funds at 31 March 2023: £42.1 million

Compared with total funds of £40.7 million on 31 March 2022

Other gains and losses in the year not shown under income or expenditure amounted to a loss of £0.75 million

*This represents 5% of our royalty income

Report by the Trustees on the summarised financial statements

The summarised financial information is extracted from the full statutory trustees’ annual report and financial statements which were approved by the trustees and signed on their behalf on 27 July 2023. An unqualified audit report was issued in relation to the full statutory trustees’ annual report and financial statements by our auditors Crowe U.K. LLP on 25 August 2023.

The auditors have confirmed to the trustees that, in their opinion, the summarised financial information is consistent with the full financial statements for the year ended 31 March 2023. This summarised financial information may not contain sufficient information to gain a complete understanding of the financial affairs of the charity. The full statutory trustees’ report, financial statements and auditors’ report may be obtained in writing from the Finance Director, Marine Stewardship Council, 1 Snow Hill, London, EC1A 2DH, UK.

Signed, on behalf of the Trustees:

Werner Kiene,
Chair, MSC Board of Trustees
25 August 2023

Governance 2022-23

The MSC Board of Trustees

The MSC Board of Trustees is the MSC's governing body. With advice from the Executive Committee, Technical Advisory Board and Stakeholder Advisory Council, it sets the strategic direction of the MSC, monitors progress and ensures the MSC meets its objectives.

Dr Werner Kiene
Chair

Mr Paul Uys
Chair, Marine Stewardship Council International Board

Mr Giles Bolton

Ms Maria Damanaki

Mr David Lock

Dr Kevin Stokes

Mr Kristjan Th. Davidsson

Thank you to departing members:

Ms Amanda Nickson

Ms Stefanie Moreland

Mr Jim Leape

Mr Stuart Green

Dr Christopher Zimmermann

Marine Stewardship Council International Board

The Marine Stewardship Council International (MSCI) Board provides oversight of the MSC's ecolabel licensing and fee structure.

Mr Paul Uys
MSCI Chair

Dr Werner Kiene
MSC Board of Trustees Chair

Mr Rupert Howes
MSC Chief Executive

Mr Giles Bolton

Mr Fernando Lago

Ms Valentina Tripp

The Technical Advisory Board

The Technical Advisory Board works in close collaboration with the MSC Executive to provide advice to the MSC Board of Trustees on technical and scientific matters relating to the MSC Standards and associated policies, including developing methodologies for certification and accreditation, as well as related scientific and technical research.

Dr Rebecca Lent (USA) Chair

Dr Florian Baumann (Germany)

Dr Tim Essington (USA)

Mr José Augusto Pinto de Abreu (Brazil)

Dr Victor Restrepo (USA)

Dr Keith Sainsbury (Australia)

Ms Michèle Stark (Switzerland)

Mr Adam Swan (UK)

Dr Christopher Zimmermann (Germany)

Welcome to new members:

Mr Wisdom Akpalu (Ghana) (Co-opted member)

Ms Jacqui Dixon (South Africa) (Co-opted member)

Ms Adriana Fabra (Spain) (Co-opted member)

In Memoria



Dr Hartwig Schafer

Dr Hartwig (Hart) Schafer died suddenly in May 2023. Internationally recognised for his work with the World Bank and European Union on improving livelihoods and inclusion, Hart joined our Board in

April 2023 and had been due to take up his role as Chair of the MSC Board of Trustees in late July 2023. We are saddened that we will not get to share our journey with him in the years ahead.



Professor Abdul Ghofar

Professor Abdul Ghofar, who passed away in March 2023, was a tireless advocate for science and sustainability. A member of our former Stakeholder Council, he touched the lives of

many through his research and commitment to applying it in practice, not least within the Indonesian blue swimming crab fishery. We will remember his contributions to fisheries science and practice.



Mr John Connelly

Mr John Connelly, President of the US National Fisheries Institute (NFI), passed away in November 2022. A popular and influential figure in the seafood industry, John had been president of the

NFI since 2003. He was a huge advocate of sustainable fishing, serving on the MSC Board of Trustees for six years. The positive impact of his work will continue to benefit the seafood industry for many years to come.

The MSC Stakeholder Advisory Council

The MSC Stakeholder Advisory Council works in close collaboration with the MSC Executive to provide advice to the MSC Board of Trustees on strategic, policy or operational issues, including input into the MSC's formal Standard review processes. It includes representatives from the seafood industry, conservation community, market sector and academia. Its membership reflects diverse expertise, experiences, geographies and interests in relation to the work of the MSC. The Stakeholder Advisory Council is also a formal channel through which all stakeholders, whether members of the Stakeholder Advisory Council or not, can provide their views to the MSC.

Ms Heather Brayford
Chair, Government of Western Australia, Department of Primary Industries and Regional Development, Australia

Dr Johann Augustyn
SADSTIA, South Africa

Mr Rory Crawford
Birdlife International/RSPB, UK

Ms Yumie Kawashima
Aeon, Japan

Mr Tor Larsen
Norwegian Fishermen's Association, Norway

Dr Ghislaine Llewellyn
WWF International, Australia

Ms Carmen Revenga
The Nature Conservancy, USA

Ms María José Espinosa Romero
Comunidad y Biodiversidad A.C (COBI), Mexico

Welcome to new members:

Mr Damien Bell
BellBuoy Seafoods, Western Australia

Mr Christian Haller
CR-Manager, Aldi Nord, Germany

Mr Marcelo Hidalgo
Fishery Consultant, PNG Fishing Industry Association, Netherlands

Dr Bryce Stewart
Senior Lecturer and Director for Engagement and Partnerships, Department of Environment and Geography, University of York, UK

Ms Mod Talawat
UN Office for Project Services, Programme Management Specialist (National Coordinator), Thailand

Thank you to departing members:

Ms Amanda Nickson

Ms Stefanie Moreland

Ms Christine Penney

Mr Ivan Lopez Pesquera

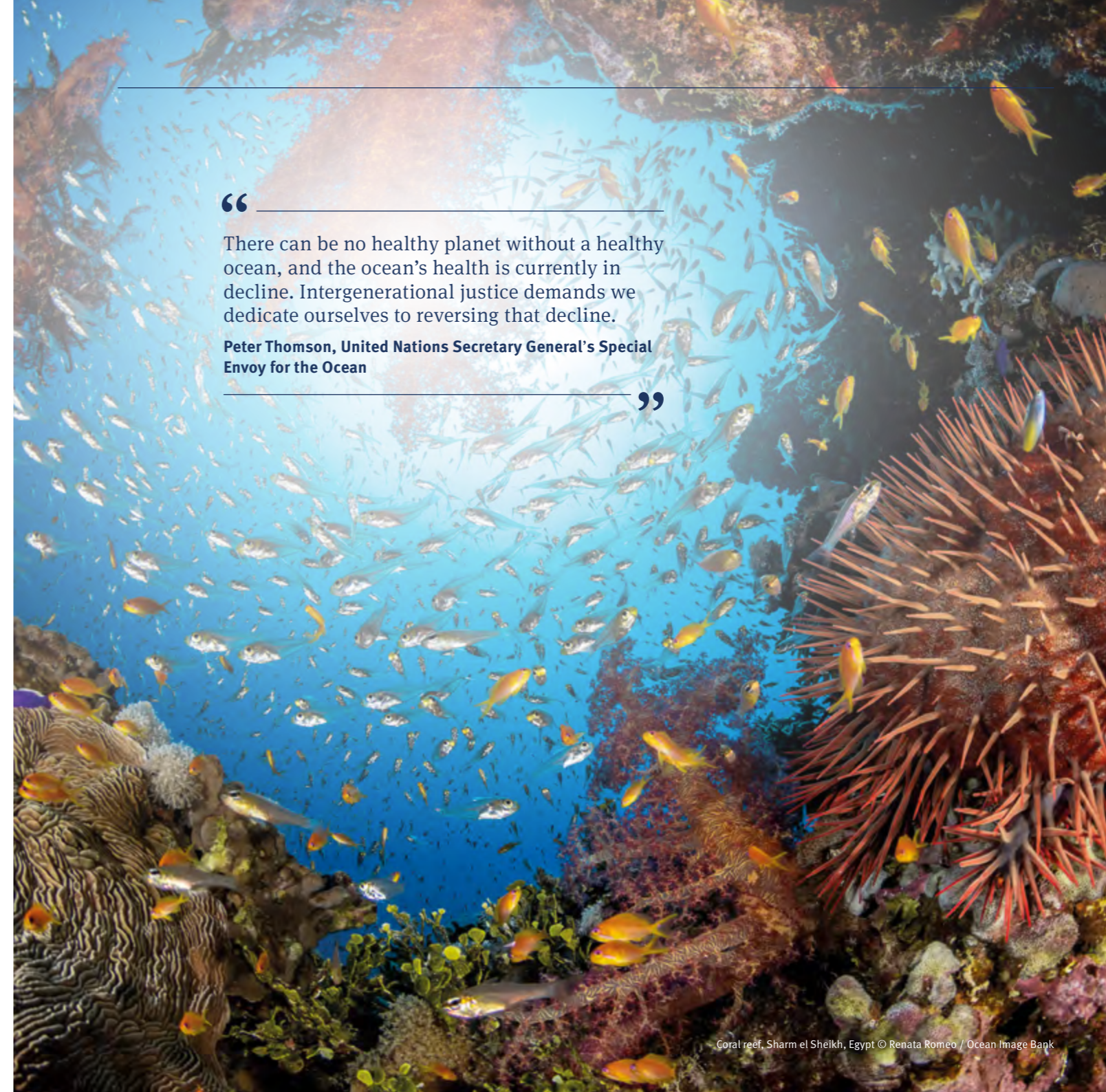
Mr Marco Quesada

“

There can be no healthy planet without a healthy ocean, and the ocean's health is currently in decline. Intergenerational justice demands we dedicate ourselves to reversing that decline.

Peter Thomson, United Nations Secretary General's Special Envoy for the Ocean

”



Please consider the environment before printing

Designed by Be Curious Limited. All images are copyright of the MSC unless otherwise stated.

All data in this report is correct as of 31 March 2023, unless otherwise stated. The reporting year is 1 April 2022 to 31 March 2023.

Registered Charity number: 1066806. Registered Company number: 3322023

Find out more:

info@msc.org

© Marine Stewardship Council 2023