

Marine Stewardship Council

Global Impacts Summary Report 2014

Monitoring and Evaluation (1999-2013)



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Who we are

The Marine Stewardship Council (MSC) is a global non-profit organisation set up to help transform the seafood market to a sustainable basis. Our fishery and supply chain certification programs recognise and reward sustainable fishing practices. We work with fisheries, seafood companies, scientists, conservation groups and the public to promote sustainable seafood. Our vision is of the world's oceans teeming with life, and that seafood supplies are safeguarded, for this and future generations.

What the MSC ecolabel means

Having the MSC ecolabel on a fish or seafood product assures consumers and stakeholders that it comes from a certified sustainable wild-caught fishery. All MSC-ecolabelled seafood can be traced back to fisheries that have been independently certified as meeting the strict MSC environmental standard for sustainable fishing. Whenever seafood is sold with the MSC ecolabel, every business in the supply chain must be independently audited to ensure that it meets our standard for seafood traceability and have a current MSC Chain of Custody certificate to prove this.

What is the MSC Global Impacts Report?

The MSC Global Impacts Report describes the impacts of the MSC certification and ecolabelling program on the environment and the management practices of participating fisheries. It includes updates on 22 monitoring and evaluation indicators, which show how the MSC's sustainability and strategy outcome objectives are being achieved. Case studies illustrate improvements being made by MSC-certified fisheries.

This report includes data ranging from the inception of the MSC in 1999 up to 31st December 2013. The MSC believes in the importance of a transparent, scientifically rigorous evaluation of its environmental and organisational impacts.

This summary report introduces readers to the full report and provides highlights of the results for 2014.

Key Findings from Global Impacts 2014

10% of global wild caught seafood engaged with the MSC

224 fisheries certified and 98 more in assessment

575 completed improvements towards best practices across 125 fisheries

1 244 improvements expected by 2020

94% of fisheries targeting stocks at or above maximum sustainable yields

No certified fisheries cause serious and irreversible harm to ETP species, with 88% at or above best practice

82% of fisheries with impacts on habitats and ecosystems at or above best practice

45% countries globally selling over 22 000 MSC-ecolabelled products

99% were found to be correctly labelled



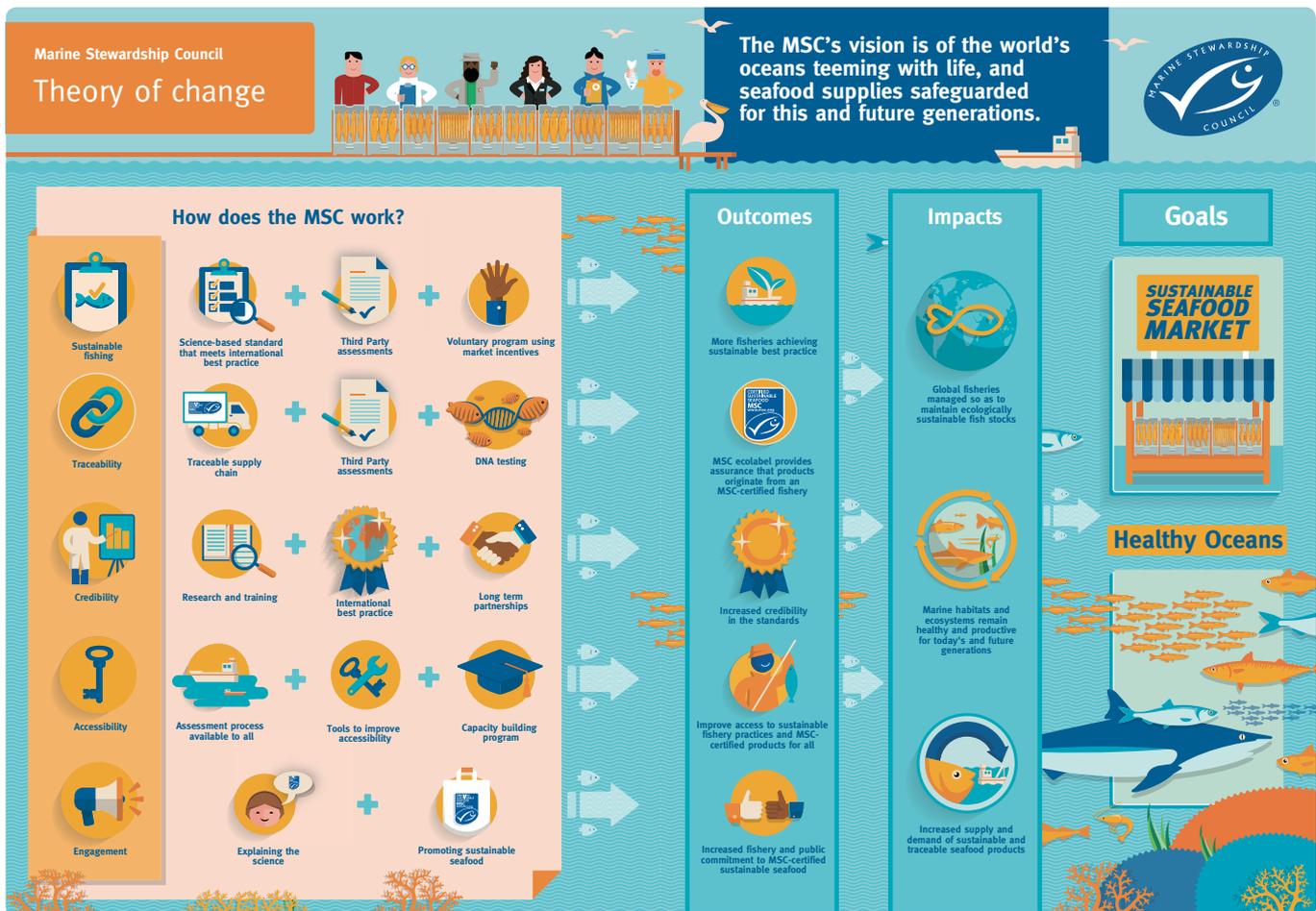
“Our first report, published in 2013, demonstrated that almost all fisheries in the MSC program make significant improvements to their operations. Improvements are seen in target stock sustainability and management, as well as the impact of fisheries on non-target species and habitats. In total 322 fisheries, representing 10 per cent of global wild capture, are currently certified or in assessment. These fisheries are amongst the leaders in supplying sustainable seafood to consumers. MSC provides a pathway to seafood sustainability, but does not implement the changes. Sustainability is delivered by the fishery with support from supply chains, retailers, environmental NGOs, funders, and governments.”

David Agnew, Standards Director

Main findings of the Global Impacts Report

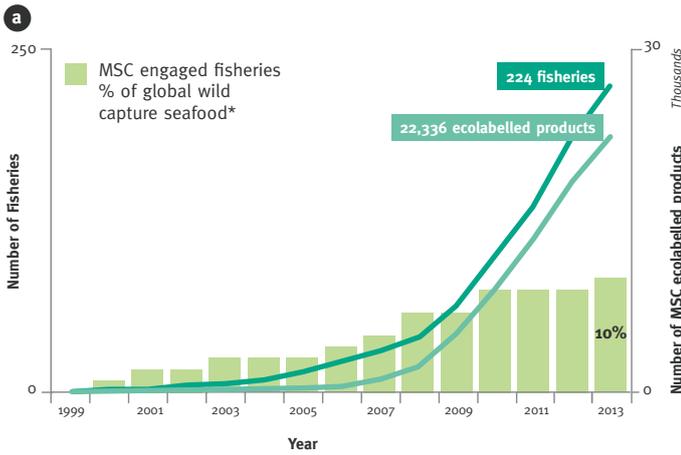
This report describes the impacts of the MSC program, its growth, geographical expansion and benefits in terms of environmental and fisheries management improvements. In addition, the report aims to provide a scientific foundation for a transparent, impartial, and consistent evaluation of the MSC's effectiveness in delivering its mission and vision.

- The **longer the fisheries stay in the program, the fewer improvements are needed towards best practice in fisheries sustainability**. This means that the sustainability performance of certified fisheries is increasing.
- There are now **224 certified fisheries**, with 98 more at different stages of the assessment process. Almost **1 250 (1 244) action plans** have been **created** and more than 570 (575) have been **completed** since 1999, delivering improvements across 125 individual fisheries.
- The proportion of **fisheries in the MSC program** with stocks that are maintained at or above **sustainable levels (MSY) is increasing** (from 80 per cent in 2009 to 94 per cent in 2013).
- The proportion of fisheries in the MSC program with habitat and ecosystem impacts at or above best practice has increased from 71 per cent in 2009 to 82 per cent in 2013, meaning the proportion of fisheries with very low impacts has risen.
- 10% of global wild caught seafood engaged with the MSC
- Chain of Custody certification is held by companies in 64 countries and ecolabelled products are available in 102 countries (up to 41 and 79 respectively in 2010).
- The MSC program is gaining recognition from consumers; logo recognition and recall has generally increased between 2010 and 2014. Purchasing behaviour in some countries has also seen a boost, reflecting consumers' positive response to seafood sustainability claims.
- The MSC's Chain of Custody program provides a high level of integrity and assurance related to labelling of seafood products. **DNA testing** conducted in 2013 from 15 different countries in 17 different species indicated **99 per cent** were found to be **correctly labelled products**.



Growth

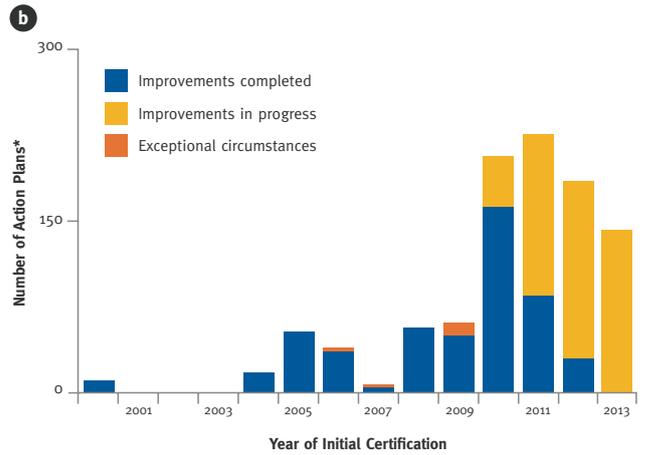
234% increase in certified fisheries and 811% in ecolabelled products in the last 5 years.



(a) Number of fisheries and ecolabelled products, and percentage of MSC engaged fishery tonnage in respect to Food Agriculture Organization landings estimates of wild capture seafood. *MSC engaged fisheries include certified, suspended and In assessment fisheries tonnages.

Improvements

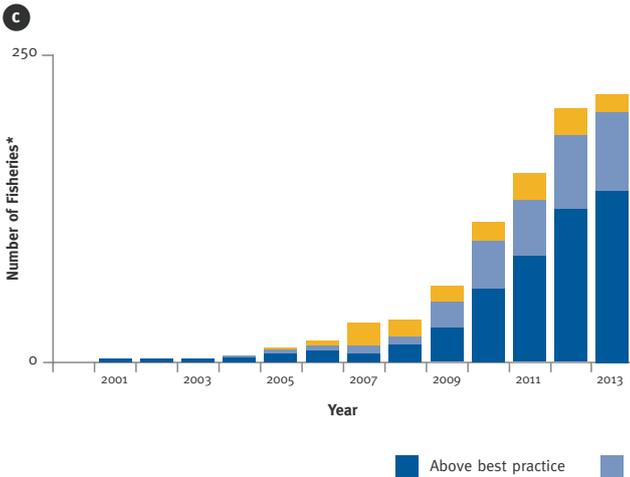
575 improvements completed since 2000 and 1 224 total improvements expected by 2020.*



(b) Number of action plans in progress and completed over time for initial assessments only; number and proportion of fisheries* at minimum sustainable levels and improving towards best practice, at best practice and above best practice. *This is based on all action plans created. Figure b) represents initial certification only.

Stock Health

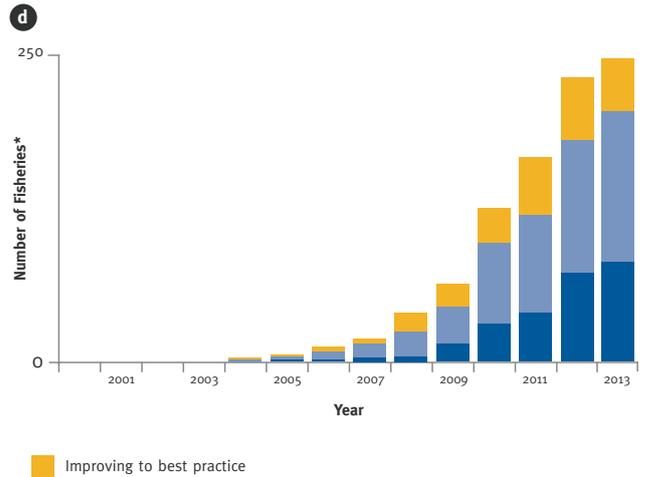
203 fisheries* (94%) targeting stocks at or above maximum sustainable levels.



(c) Number and proportion of fisheries* at minimum sustainable levels and improving towards best practice, at best practice and above best practice in (c) target stock status, (d) habitat and ecosystem impacts, and (e) management systems.

Habitats and Ecosystems

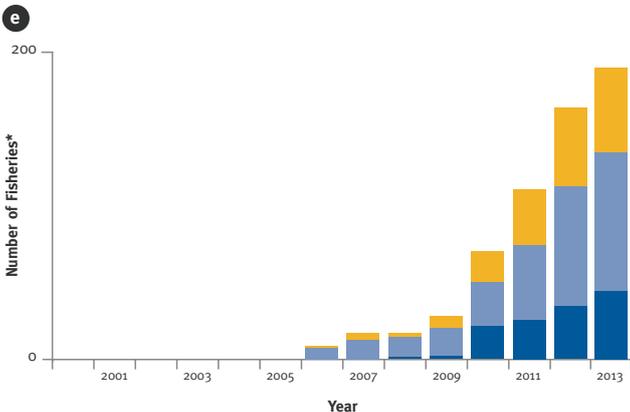
11% increase in the proportion of fisheries with environmental impacts at or above best practice in the last 5 years.



(d) Habitat and ecosystem impacts, and (e) management systems.

Fishery management

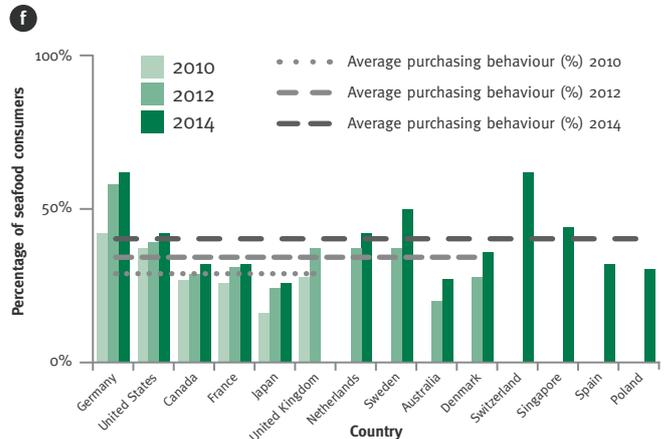
16% increase in the proportion of fisheries with management systems above best practice in the last 5 years.



(e) Management systems.

Purchasing behaviour

11% average increase in seafood consumers purchasing MSC products since 2010.



(f) Purchasing behaviour of ecolabelled products by seafood consumers by country surveyed in 2010, 2012 and 2014 (dotted line represents the average for all countries surveyed).

For technical construction and methodology, including number of fisheries* refer to the Global Impacts Report 2014.

Fishery case studies: sustainable impacts

New Zealand hoki fishery

Target Stock Status (Figure c)

“The western stock is considered to be fully rebuilt and both stocks are now considered to be within sustainable limits.”

Background

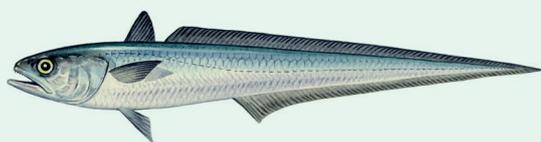
In 2001, New Zealand hoki (*Macruronus novaezelandiae*) was the **first large-scale whitefish fishery to achieve MSC certification**. The fishery was subsequently re-certified in 2007 and 2012. The fishery is currently subject to extensive research, individual transferable quotas (ITQ) and an integrated approach to management between industry and government (co-management). Hoki is managed as two stocks: the eastern stock and the western stock. Hoki is a fast growing fish living for 20-25 years and can grow to over a metre in length. They are caught using bottom trawls except during winter spawning season where pelagic trawls (mid-water) are used.

Actions needed

During the first five-year certification cycle, **improvements had been made on spatially explicit, stock-specific management**. Between 1995 and 2001, the western stock declined due to low recruitment. **New improvement action plans on stock rebuilding and better definition of limit and target reference points** were therefore introduced. These included a determination of desired rate of recovery towards the target, development of a rebuilding strategy and implementation of management strategy evaluation to monitor the recovery under different fishery scenarios.

Improvements achieved

In 2006, the industry implemented a formal stock rebuilding plan for the western stock which was updated annually to monitor progress. The Fisheries Management Plan was finalised and adopted, including reference points and desired rates of recovery in case the fishery falls below target. Catch limits were reduced through the New Zealand Quota Management System (QMS) and the spawning stock biomass has increased substantially. The **western stock is considered to be fully rebuilt and both stocks are now considered to be within sustainable limits¹ (above B_{MSY})**. There are currently no improvements needed on stock status (score of 90) and this fishery has completed all its action plans. Since the first certification in 2001, the populations of both New Zealand hoki stocks have more than doubled².



© Scandinavian Fishing Year Book

- 1 Ministry for Primary Industries. 2013. Fisheries Assessment Plenary May 2013. Stock Assessments and Yield Estimates Volume 1: Introductory sections to jack mackerel. Compiled by the Fisheries Science Group, Ministry for Primary Industries, Wellington, New Zealand. 1357p
- 2 MRAG Americas, Inc., 2010. MSC Public Certification Report for Cornwall Sardine Fishery 131p. Accessed by: www.msc.org/track-a-fishery/fisheries-in-the-program/certified/north-east-atlantic/cornwall-sardine/assessment-downloads/25.06.2010-cornish-sardine-public-certification-report.pdf
- 3 MacAlistair Elliot and Partners LTD, 2013. SURVEILLANCE VISIT REPORT FOR THE CORNWALL SARDINE FISHERY (SARDINA PILCHARDUS) CERTIFICATE CODE: MEP-F-014 SURVEILLANCE YEAR 3 43p. Accessed by: www.msc.org/track-a-fishery/fisheries-in-the-program/certified/north-east-atlantic/cornwall-sardine/assessment-downloads/20130820_SR_SAR031.pdf

You can view the full Marine Stewardship Council: Global Impacts Report 2014 at www.msc.org

Cornwall sardine fishery

Management Systems (Figure e)

“This improved research plan and information will greatly contribute to a more certain management of Cornwall sardine.”

Background

The Cornish sardine (*Sardina pilchardus*) fishery was certified in 2010. The fishery uses ring nets and small legal drift nets, **operating in traditional areas within six miles off the coast of Cornwall**. Sardines can be found throughout the North Atlantic eastern continental margin from Senegal to the British Isles and in the Mediterranean and adjacent seas. They are commercially exploited across their distribution range, with the most important fisheries occurring in upwelling areas. Sardine is a pelagic fish that forms large schools in depths of 10 m to 100 m. Schools of juvenile sardines tend to be separated from adults and are found closer to shore, typically associated with estuaries and rivers.



Cornwall sardine boat © Matt Watson

Actions needed

The Cornish Sardine is classified as a non-pressure stock and therefore not considered a priority for management. Some regulations are in place such as a restricted number of fishing licenses, minimum landing sizes, and limits to mesh sizes, but no Total Allowable Catches (TACs) or quotas are set for this fishery. Thus, **conditions for certification included explicit elaboration of short and long-term fishery-specific objectives** that are consistent with achieving the MSC standard, developing and incorporating harvest control rules, and implementing a research plan including fishing surveys².

Improvements achieved

The fishery has made substantial progress on the design and **implementation of research plans**, which are now agreed by all stakeholders. The Cornish Sardine Management Association (CSMA) has agreed to develop a policy document establishing harvest control rules that all members have to comply with, which in turn requires monitoring of catch and bycatch data³. Furthermore, CSMA has agreed to contribute to the implementation of a regional survey aimed at determining the age structure and distribution of sardine in the Southern Celtic Sea and Western English Channel and at locating the nursery grounds and distribution of eggs and larvae³. This improved research plan and information will greatly contribute to a less uncertain management of Cornwall sardine.

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