

Marine Stewardship Council

Global Impacts Summary Report 2015

Monitoring and Evaluation (1999-2014)



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Who we are

The Marine Stewardship Council (MSC) is an international non-profit organisation established to address the problem of unsustainable fishing and safeguard seafood supplies for the future. Our vision is for the world's oceans to be teeming with life – today, tomorrow and for generations to come. Through our certification and ecolabelling program, we're helping to create a more sustainable seafood market. We run the only certification and ecolabelling program for wild-capture fisheries that meets best practice guidelines set by both the United Nations Food & Agriculture Organization and ISEAL, the global membership association for sustainability standards. By being part of this program fisheries, retailers and food processors from around the globe are helping to safeguard seafood supplies.

The Monitoring and Evaluation program

The monitoring and evaluation program aims to achieve a clear understanding of the environmental and organisational impacts of the MSC's Fisheries Standard and Chain of Custody Standard.

In order to assess how well the MSC is achieving its aims, the monitoring and evaluation program collects empirical data that can be evaluated against the MSC's sustainability and strategy outcome objectives.

The resulting indicators presented in the **Global Impacts Report** and introduced in this summary were developed in consultation with stakeholders and measure the quantity and quality of short, medium and long-term effects of the MSC program on certified fisheries, target resources, associated ecosystems, product integrity and other areas of strategic activities.

Key Findings from Global Impacts 2015

10% of global wild caught seafood now comes from fisheries certified under the MSC Fisheries Standard

Growing global coverage with **19** certified fisheries in developing countries and **12** more in assessment

231 MSC certified fisheries with **88** more in assessment

Chain of custody certificates held in **72** countries and ecolabelled products sold in **97** countries

615 improvements have been completed by MSC certified fisheries since 2000 with a total of **1100** expected by 2020

95% of certified fisheries have stock status at or above global best practice with the remainder improving

86% of fisheries meet or exceed international best practice requirements for habitat and ecosystem management

90% of certified fisheries meet or exceed best practice requirements for reducing the impacts of fishing on Endangered, Threatened or Protected Species

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. This edition includes data ranging from the inception of the MSC in 1999 up to 31 December 2014. 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.



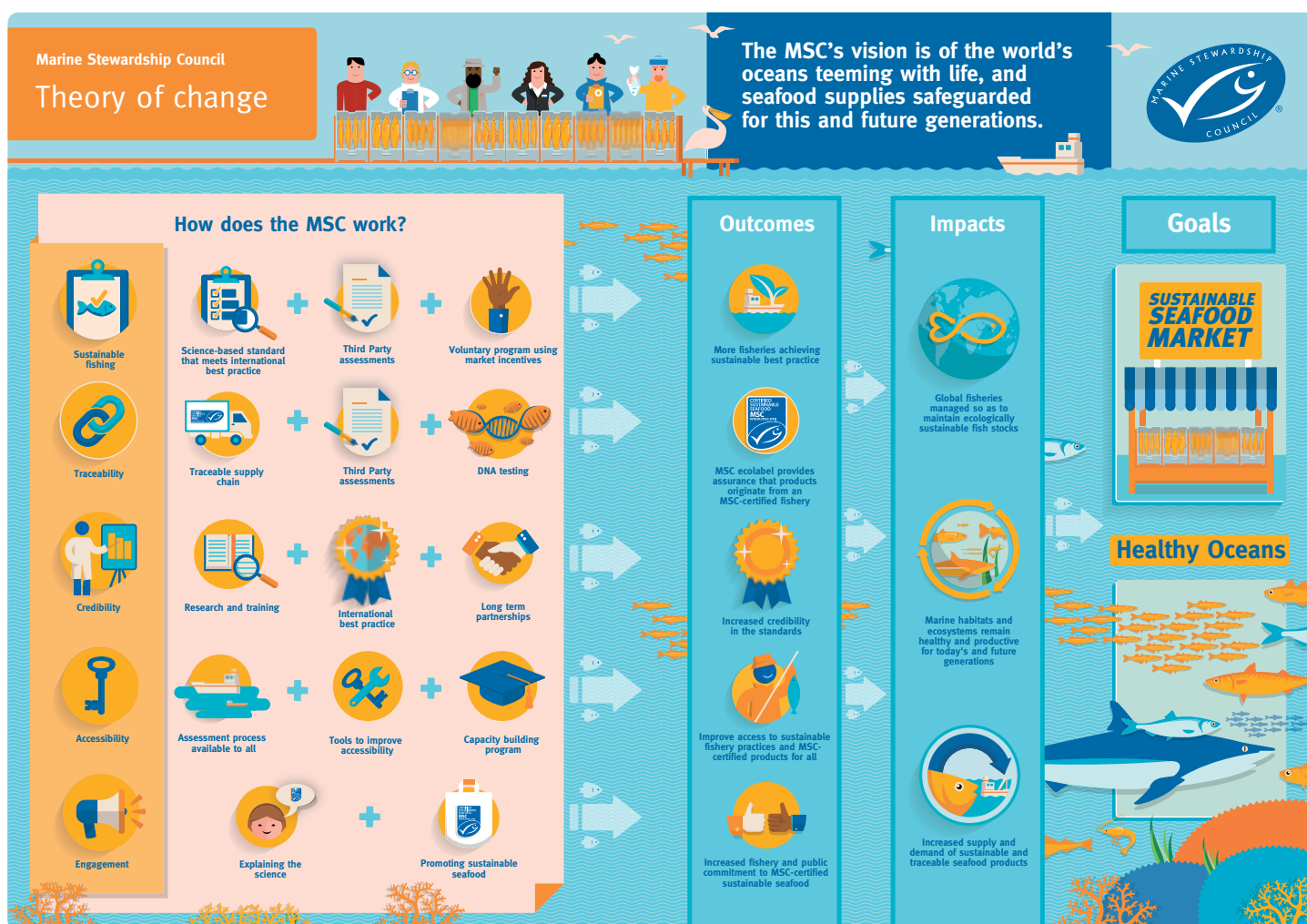
“Our first report, published in 2013, demonstrated that fisheries in the MSC program make significant improvements to their operations when needed. Improvements are seen in target stock sustainability and management, as well as the impact of fisheries on non-target species and habitats. In total 231 fisheries, representing 10% of global wild capture are currently certified. These fisheries are amongst the leaders in supplying sustainable seafood to consumers. The 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

The Global Impacts Report describes the impacts of the MSC program, its growth, geographical expansion and benefits in terms of environmental and fisheries management improvements and associated product integrity.

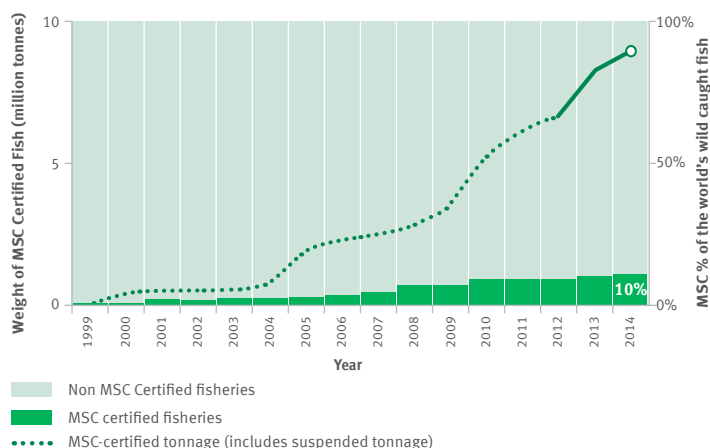
Main findings of the Global Impacts Report

- Program update** – In 2014, the number of fisheries which met the MSC Standard was 231 with 88 more in assessment. The number of Chain of Custody certificates has increased from 2543 in 2013 to 2791 in 2014.
- Consumer demand** – Seafood consumers are increasingly able and willing to play their part in helping to safeguard fish resources for this and future generations. In 2014, approximately 40% of seafood consumers surveyed had purchased MSC products at least once or twice before, an increase of 11% since 2010.
- Program accessibility** – Nineteen fisheries have now met MSC certification in developing countries and 12 are in assessment. The MSC continues to promote its Benchmarking and Monitoring Tool (BMT) to help small scale and developing world fisheries meet the MSC Standard.
- Geographic growth** – The global reach of the MSC program continues to grow. MSC certified fisheries are now based in 35 countries; Chain of Custody certificates are now held by companies in 72 countries; and MSC ecolabelled products are now available in 97 countries.
- Continual Improvements** – MSC certified fisheries are continuing to make significant improvements to their operations. Since 2000, 615 improvements have been made and a total of 1100 are expected by 2020.
- Global best practice** – The proportion of fisheries in the MSC program that have stock status management at or above best practice has increased from 80% in 2009 to 95% in 2014. The remainder are certified as not adversely impacting stock biomass and are subject to time-bound improvement plans to attain best practice.



Growth

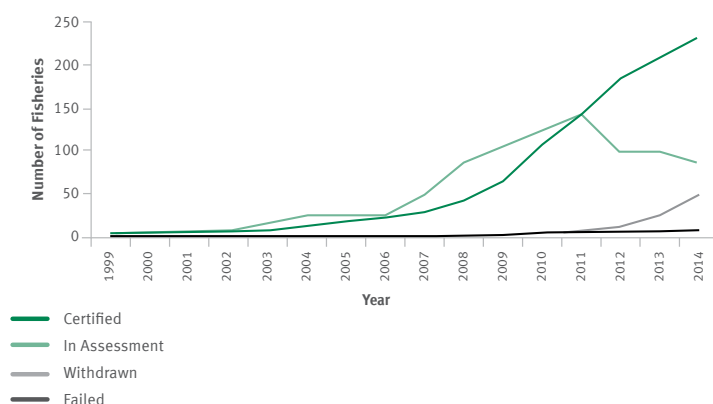
585 000 tonnes of seafood newly certified as sustainable in the past year



Trends in estimates of total landings (in tonnes) of MSC-certified fisheries and their combined percentage with respect to the global FAO landing estimates of wild capture fish. The dotted line represents the retrospective best estimate of MSC landings.

Fishery Participation

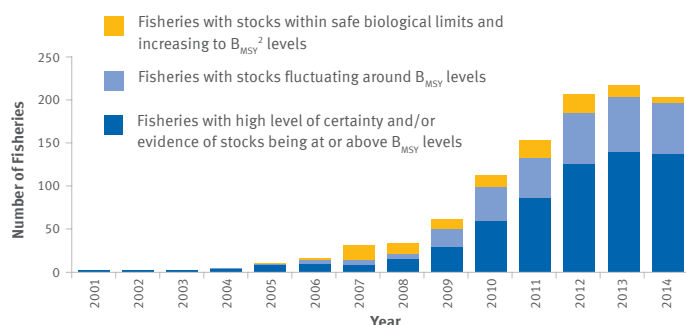
36 fisheries newly certified in 2014, and 51 entering assessment



Number fisheries certified, in assessment, withdrawn, or failed in a given year.

Target Stock Status

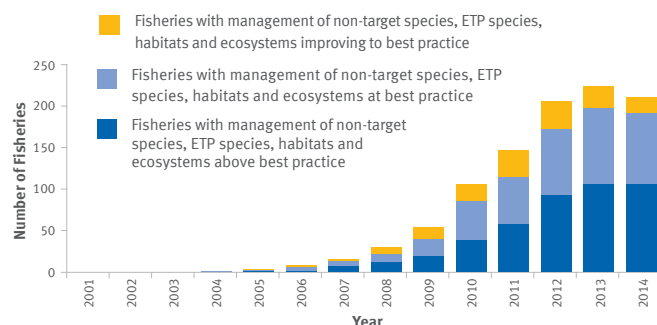
95% of certified fisheries have target stock status at or above global best practice with 5% improving towards best practice



Number and proportion of MSC fisheries with stock status scores at or above 90 (high certainty of B_{MSY} levels over recent years), between 80 and 89 (fluctuating around B_{MSY} levels), and below 80 (stocks within safe biological limits and increasing towards B_{MSY} levels) by year.

Species, Habitats and Ecosystems

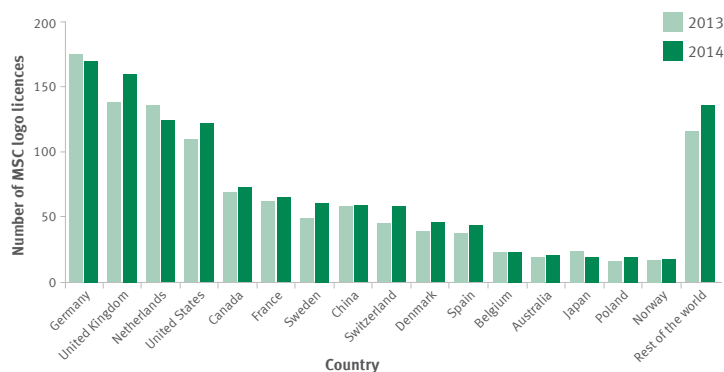
75% of certified fisheries have management of non-target and ETP¹ species, habitats and ecosystems at or above best practice



Number and proportion of MSC fisheries with all management scores for non-target species, ETP species, habitats and ecosystems at or above 90 (above best practice), between 80 and 89 (at best practice), and below 80 (improving towards best practice) by year.

Global Reach

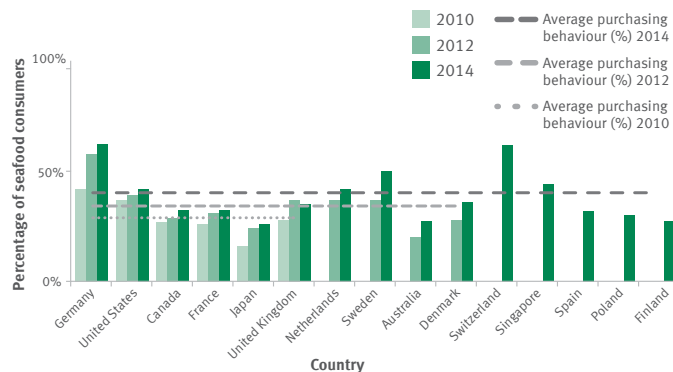
MSC products are available in 72 countries. The global sum of products available in individual countries has grown 17% in the last year



The number of MSC logo licences by country in 2013 and 2014.

Purchasing Behaviour

40% of seafood consumers across all countries surveyed have purchased MSC products at least once or twice before



Percentage of seafood consumers having purchased MSC-ecolabelled products, at least once or twice before, by country in 2010, 2012 and 2014. The horizontal lines represent the average purchasing behaviour by year (N2010 = 3 516, N2012 = 5 977, N2014 = 7 806).

The Marine Stewardship Council

MSC South Australia Lakes and Corong fishery / © Randy Larcombe



The MSC Fisheries Standard

The MSC Fisheries Standard brings together 15 years of collaboration with scientists, the fishing industry and conservation groups. It reflects the most up-to-date understanding of internationally accepted fishery science and best practice management.

Fisheries that volunteer to be assessed to this standard are evaluated against 31 Performance Indicators (PIs), which sit within three principles: Sustainable Fish Stocks, Minimising Environmental Impacts and Effective Management. The revised standard, version 2.0, released in October 2014 contains 28 PIs.

© MSC



The MSC Chain of Custody Standard

To be part of the supply chain for MSC certified seafood, processors, retailers and restaurants must comply with the Chain of Custody Standard. This ensures that MSC certified seafood is not mixed with uncertified product and can be traced back to a certified fishery. This gives consumers assurance that only seafood from an MSC certified fishery can carry the blue MSC ecolabel. DNA testing of random seafood samples helps to confirm this.

© MSC



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 MSC Fisheries Standard. Every business along an MSC certified seafood supply chain must comply with the MSC Chain of Custody Standard, ensuring that MSC labelled seafood can be traced back to a sustainably managed certified fishery.

1 ETP; Endangered, threatened and protected species

2 B_{MSY}; Biomass at maximum sustainable yield.

FAO 2014; The state of the world's fisheries and aquaculture 2014. UN Food and Agriculture Organization, Rome.

You can view the full Marine Stewardship Council: Global Impacts Report 2015 at www.msc.org/global-impacts



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