

De kansen voor seafood, een mondiaal perspectief

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We eten minder seafood dan WHO advies

19%

eat two or more
portions of
seafood
a week

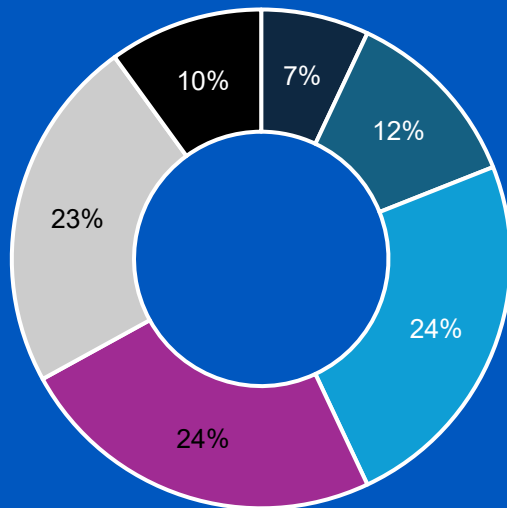
Demographics

Age 18–24: 12%

Age 25–34: 13%

Age 35–54: 18%

Age 55+: 25%



- I eat more than two portions of fish or seafood a week
- I eat two portions of fish or seafood a week
- I eat one portion of fish or seafood a week
- I eat one portion of fish or seafood less than once a week
- I eat one portion of fish or seafood less than once a month
- I don't eat fish or seafood

91% van de consumenten is bezorgd over de staat van de oceanen, toename sinds 2022; grootste toename in USA en China; 18–24 jarigen 'catching up'.

Worry about the state of world's oceans, "agree" (3+4 on a 4-point scale), seafood consumers, 2022 and 2024

Increase since 2022 (↑)

Decrease since 2022 (↓)

Demographics

MSC Blues: 97% (no change)

Age 18–24: 88% (+4 pp) ↑

Age 25–34: 89% (+3 pp) ↑

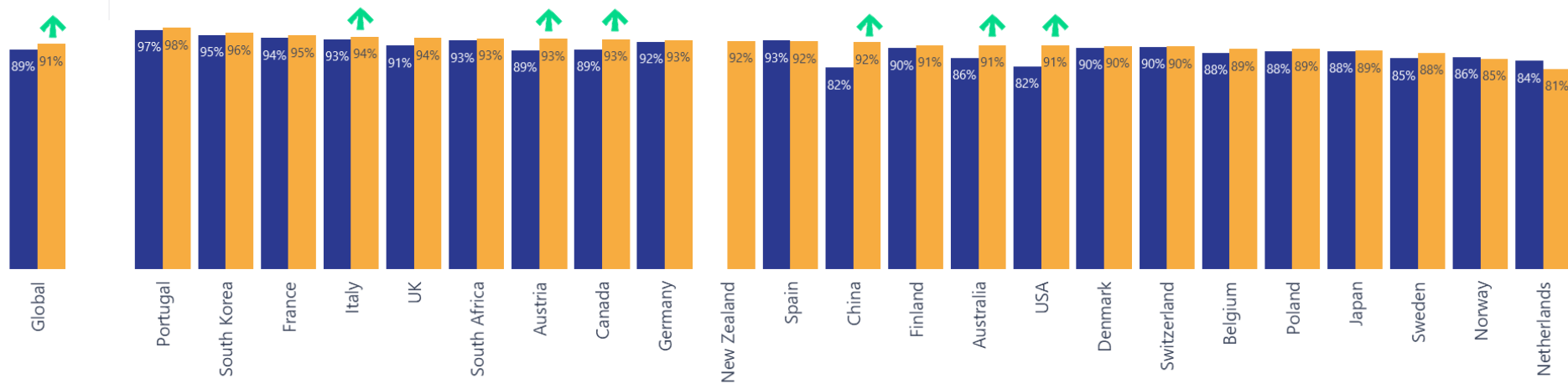
Age 35–54: 91% (+2 pp) ↑

Age 55+: 94% (+2 pp) ↑

I feel worried about the state of the world's oceans

2022

2024



Base: Seafood consumers, global, n=20,308

Q105.1: Please indicate how much you agree or disagree with the following statement: I feel worried about the state of the world's oceans.

Een gezamenlijke kans

- *‘Given its health benefits, prospects for substantial expansion, and potential for a relatively small environmental footprint, the EAT-Lancet report suggests seafood to be a particularly promising source of protein in the future’.*



Wat zegt AI hiervan?

If we half our meat consumption and double seafood consumption, what would be the consequence?

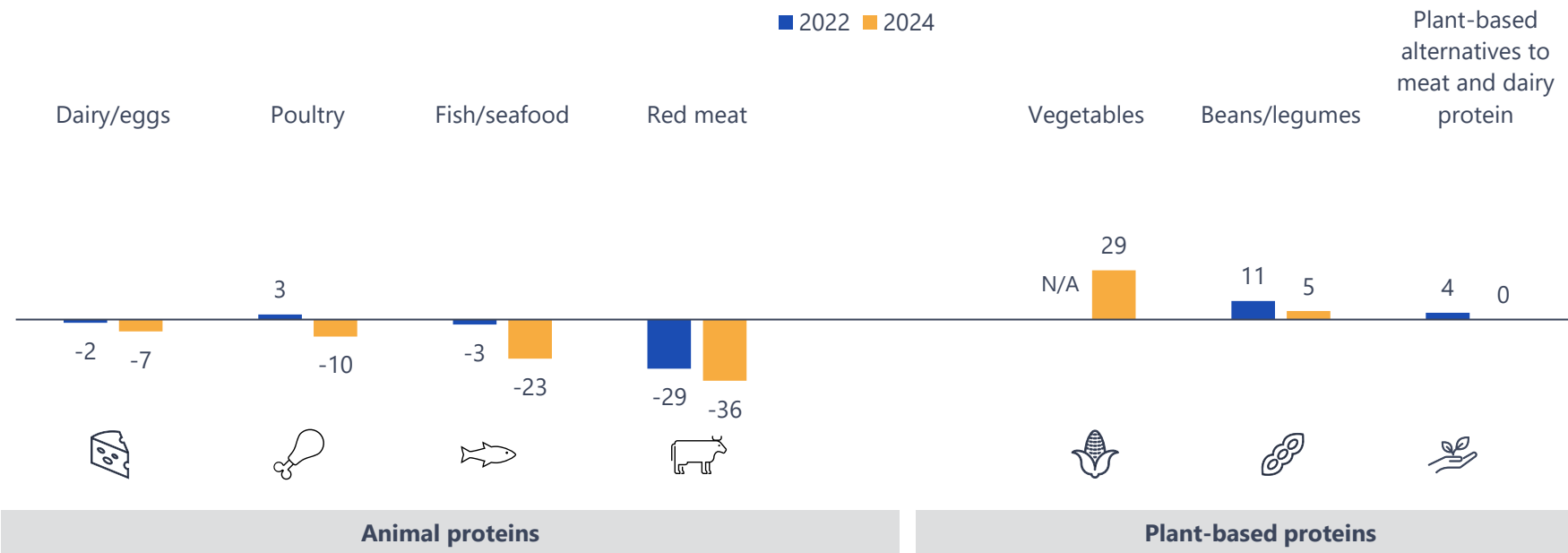
1. We'd have a radically reduced CO₂ emission from the food system, 40-50% reduction.
2. Health benefits are clear, reduced for heart disease, stroke, and cancer risk.

Key caveats: calculations vary, seafood type matters, prioritize low-impact species.



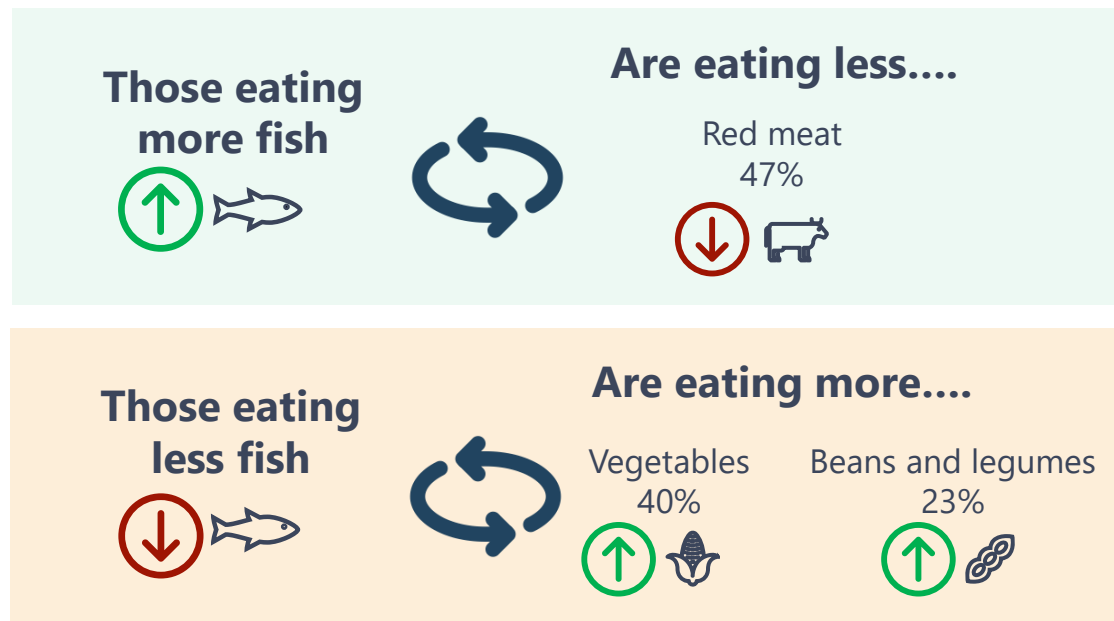
In de 2024 global survey zeiden respondententen dat ze minder dierlijke eiwitten consumeerden dan in 2022. M.n. reductie in consumptie van rundvlees. Vgl met 2022 nam de consumptie van 'plant-based proteins' niet toe

Changes in food consumption compared to two years ago, net consumption scores (net consumption = "eat more" minus "eat less"), general population, 2022 and 2024



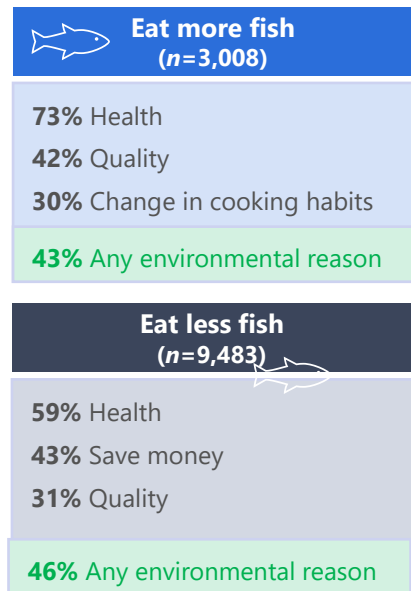
We observeerden een verschuiving, respondenten die meer seafood aten, eten minder (rood) vlees; respondenten die minder seafood aten, eten meer vegetarisch/vegan

Changes in seafood consumption compared to two years ago, general population, 2024



Prijs is een uitdaging, duurzaamheid, gezondheid een kans

Top three reasons for changing diet compared to two years ago, all who changed their diets (eat less/more of any items), 2024



Gezondheid, kwaliteit, milieu zijn key redenen om meer seafood te eten

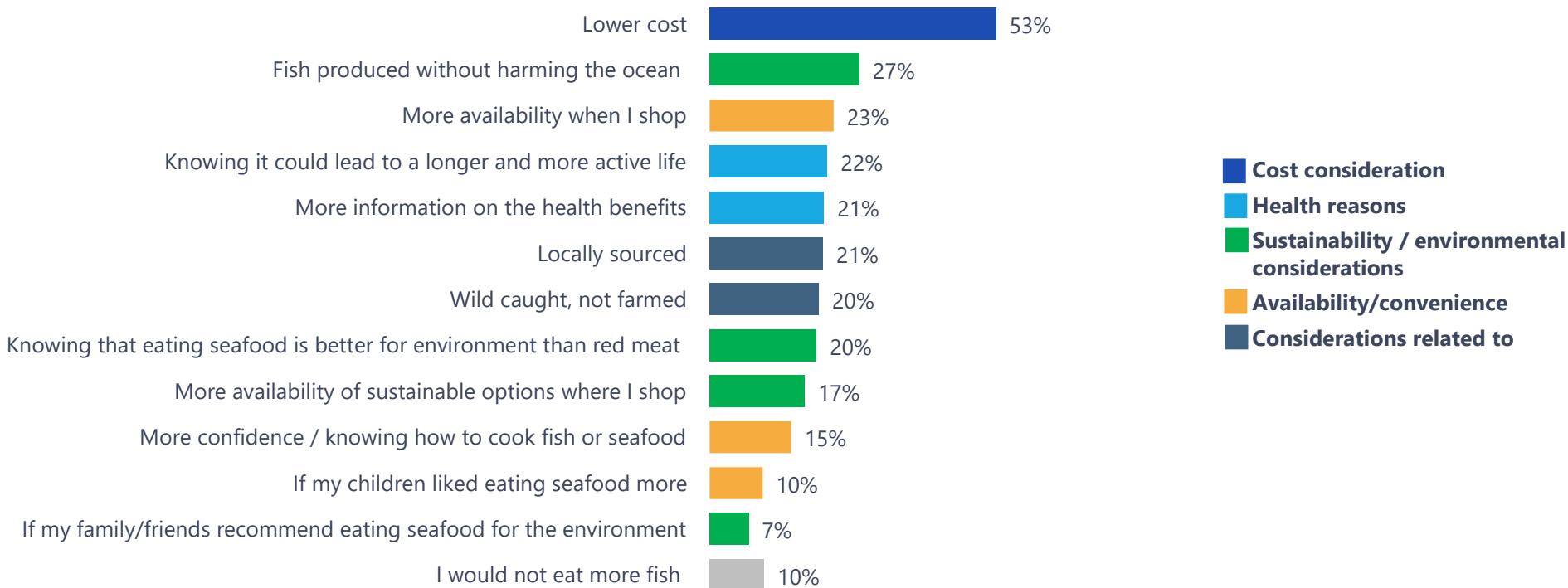
En...gezondheid, geld besparing, milieu zijn belangrijke redenen om minder seafood te eten

‘Gezond en duurzaam’

Belangrijk om consumenten te binden/terugwinnen

Meer dan de helft van global consumers zegt dat lagere kosten een reden zijn om meer seafood te eten; Andere top motivators van seafood consumptie zijn duurzaamheid/gezondheid/beschikbaarheid

Ways to encourage people to eat more fish/seafood per week, seafood consumers, 2024

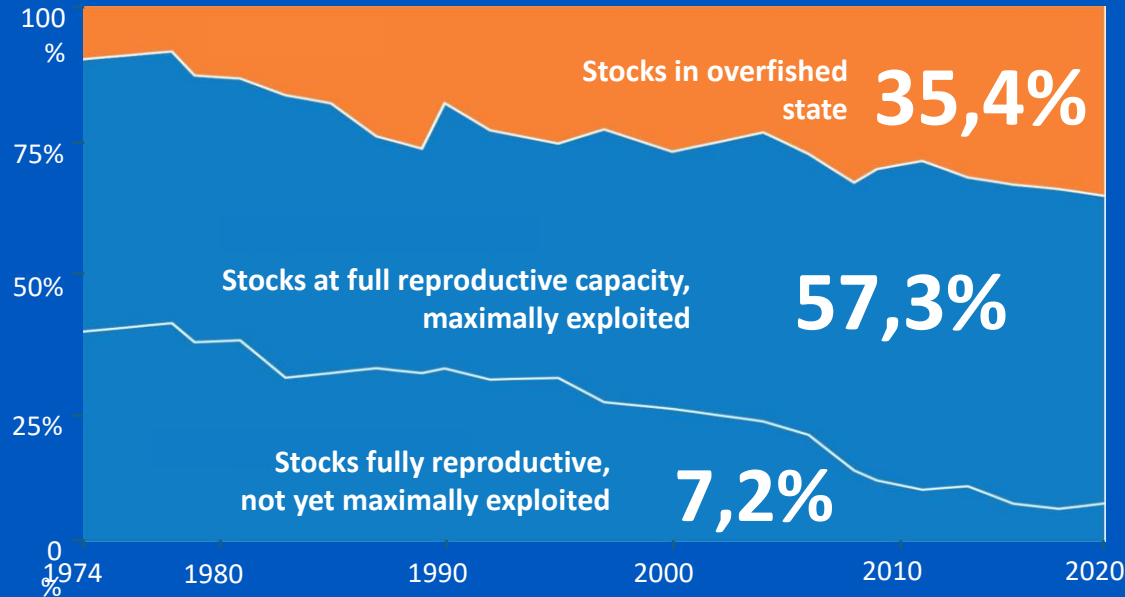


Duurzaamheid een kans en een uitdaging...



De ene vis/mossel is de andere niet...

- FAO schat dat ca 35,4% van de bestanden overbevist is.
- Verschillende soorten, vangstmethoden, schepen, brandstoffen...impliceert grote verschillen in GHGe/kg (zelfs voor dezelfde soorten)
- Correlatie met reputatie en prijs!



SDG Goal 14, life below water

- *‘Effectively regulate harvesting and end overfishing and IUU’.*
- I.e. herstel van bestanden naar niveaus waar ‘maximum sustainable yield’ geproduceerd kan worden.
- Publieke en private sector hebben beide een cruciale rol
- FAO, UNEP and CBD erkennen MSC als tool die de publieke en private stakeholders kan helpen.



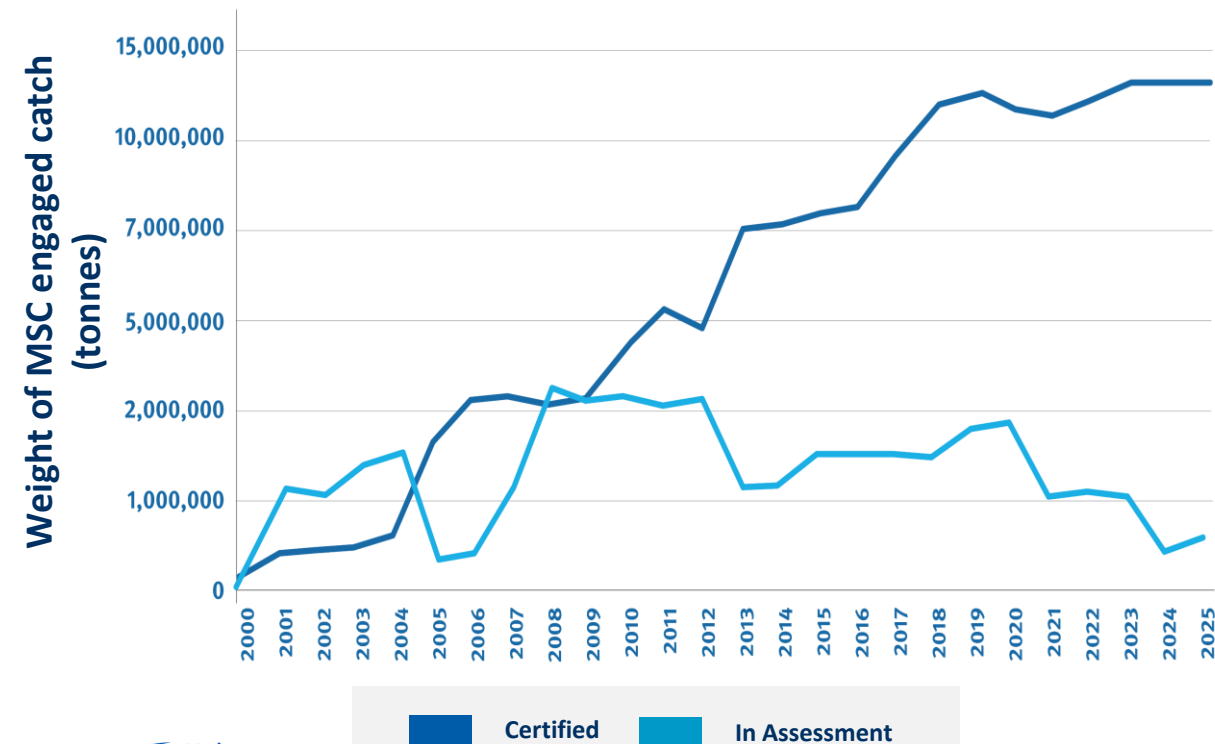
The Marine Stewardship Council

MSC

- Wereldwijd, non profit, wetenschap gebaseerd, stakeholder gedreven programma.
- Stelt markten/marktactors in staat om geloofwaardig onderdeel te zijn van oplossingen, om duurzame visserij te bevorderen.



Mondiale vangst visserijen in MSC programma



19-21%
wereldwijde marine vangst

14.7 million
tons certified

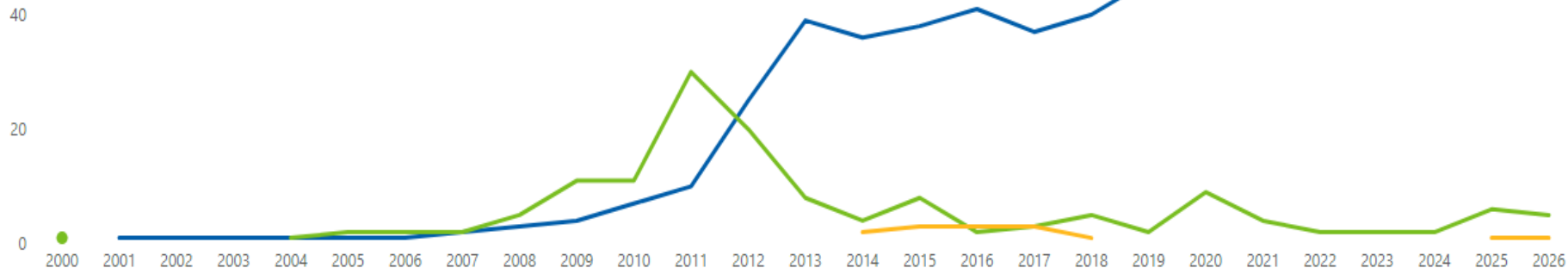
600,000 tons
in assessment

227,000 tons
in the MSC Improvement
Programme

Schelpdier visserijen in het MSC programma

Number of Fisheries by Year and Status

● Certified ● In Assessment ● Suspended

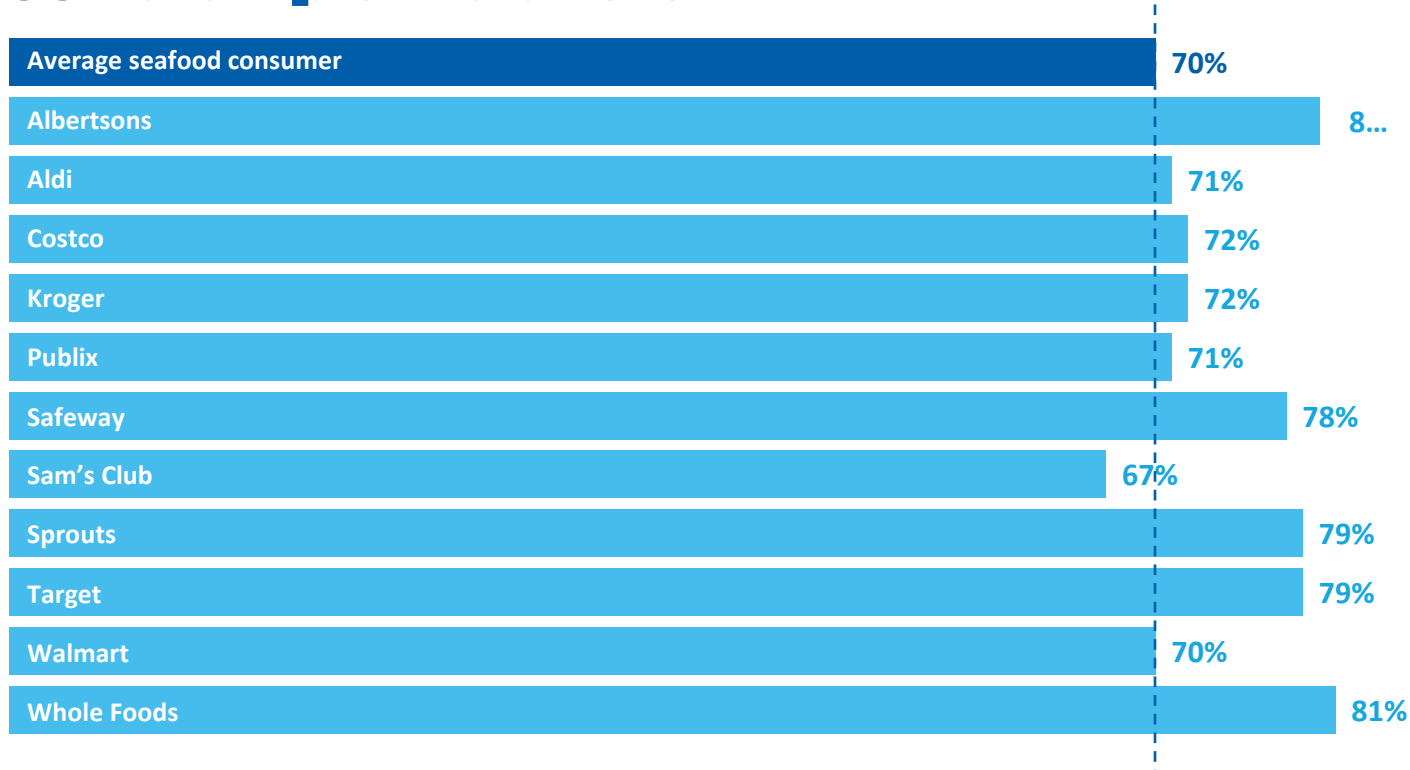


- **55 bivalve fisheries, 79 UoC**
- **25 soorten, 17 landen**
- **Vangst: 1.17 miljoen MT/yr**

Duurzame groei in de markt



Vraag naar onafhankelijke borging claims: USA example - retailers



Retailers' and brands' claims about sustainability and environment need to be clearly labeled by an independent org.
Describes opinion well, top three (5+6+7 on 7-pt scale). Base: seafood consumers (US), n=2,572

Globe
Scan

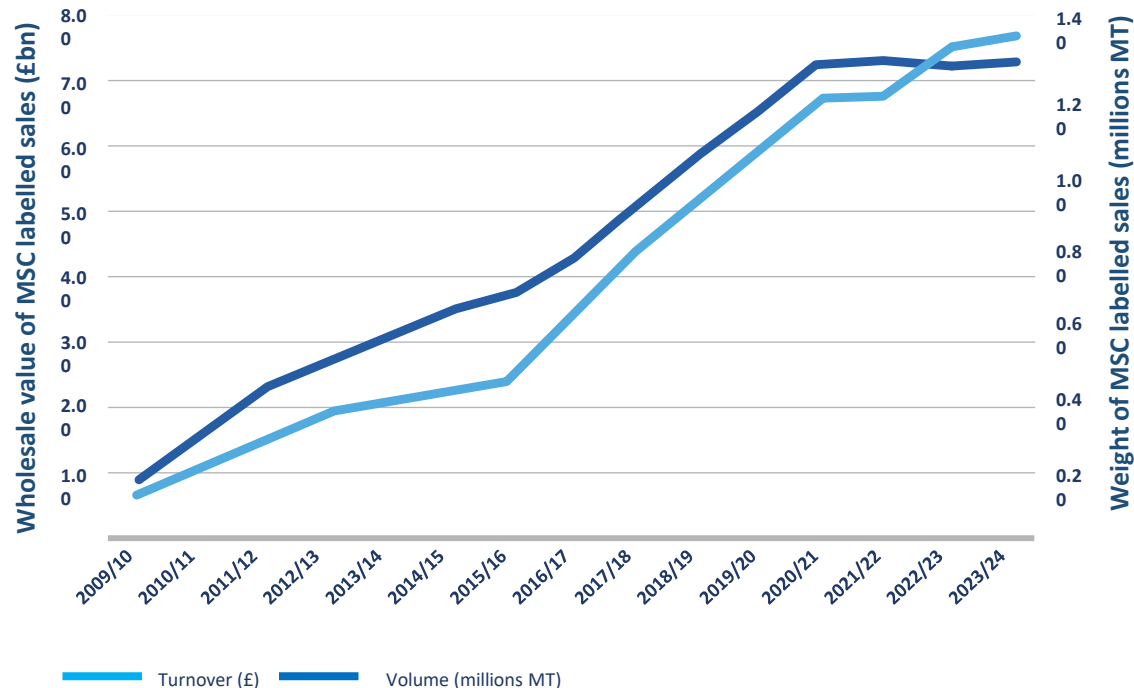


Samenwerking in de supply chain

- Leidende FMCG retailers & merken hebben vaak robuuste MSC (en ASC) gerelateerde doelstellingen mbt seafood assortiment.



Omzet producten met keurmerk groeit



*Actual data reported to 31 March 2025, with forecasts for 2024/2025

- **21,859 products**
with the blue MSC label

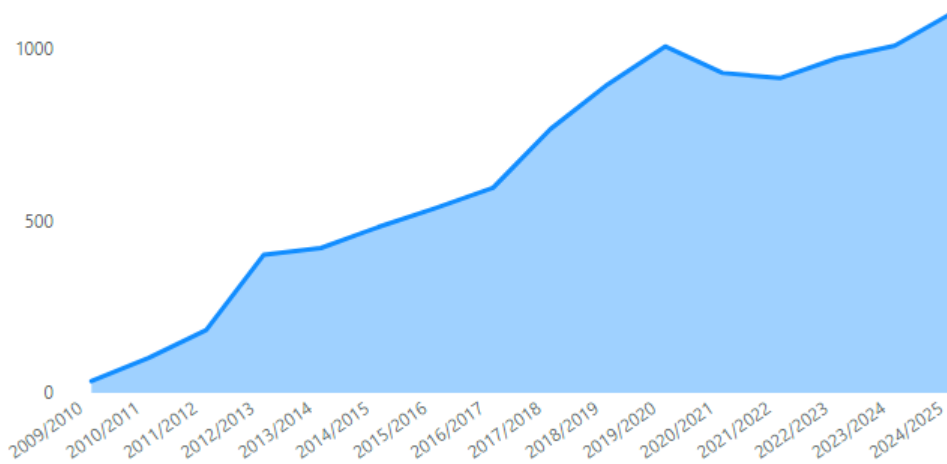
- **63 nations** where
consumers can buy MSC labelled products

- **1,385,178 tonnes**
(2024-2025 volume of sales)

- **US\$8 billion**
(2024-2025 wholesale value)

MSC schelpdier producten

Live products over time



- **1104 products**
with the blue MSC label

- **Ca. 50,000MT/yr**

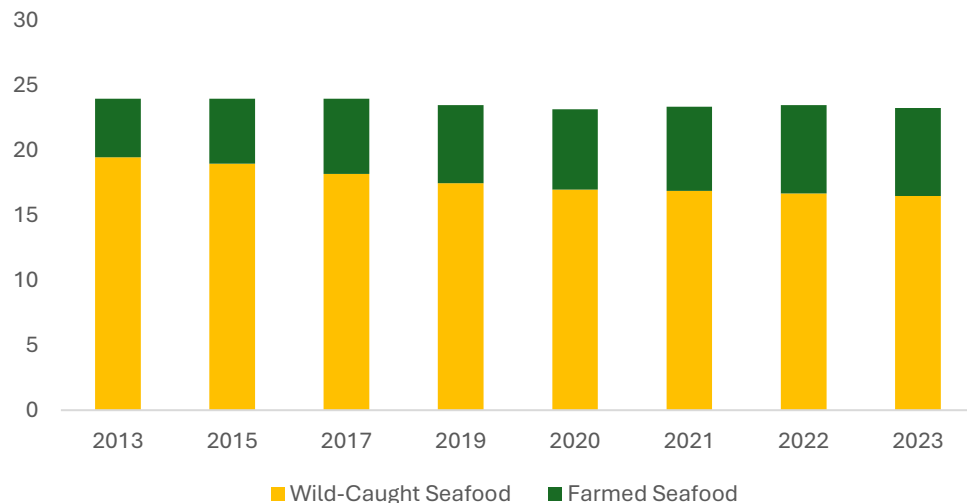
- **£210 million**
2025 wholesale value

- **+5% YoY**

MSC trend gaat tegen de markt trends in



Seafood consumption in the EU 2013-2023, kg/c



- MSC certificatie en keurmerk helpen met bouwen/handhaven van vertrouwen.
- Duurzame aanvoer – stabiliteit – langere termijn visie
- Productontwikkeling, marketing en waardecreatie, prijzen minder volatiel.

Source data: MSC Fish & Market Report (2024), our world in Data European Market Observatory, for Fisheries and Aquaculture Products (EUMOFA)

**Samen
kansen
benutten**



Communicatie in de winkel werkt!

Signposting and promoting sustainability certifications contributed to 25% sales lift compared to the rest of Walmart US stores.



Informatie en keuze, slimme prijs-setting

- Side by side test in Sams-Club for nutraceuticals, Omega3 products.
- MSC and non-MSC offered at different price points besides one another
- Simple messaging and certification with MSC product.
- Despite higher price tag, drove purchases.



Communicatie buiten de winkel

- Chicken of the sea & MSC joint campaign 'choose blue'.
- Approachable product provides entry point into sustainability.
- Also significant MSC awareness growth.



Samen communiceren: brede sector campagnes

- 22 US partners from across the seafood supply chain supported our Earth Month campaign.
- Engaging the growing eco-conscious consumer
- Marketing toolkit to promote MSC certified products, including in-store POS
- Customizable assets to help tell story, building trust and credibility for sustainable seafood.

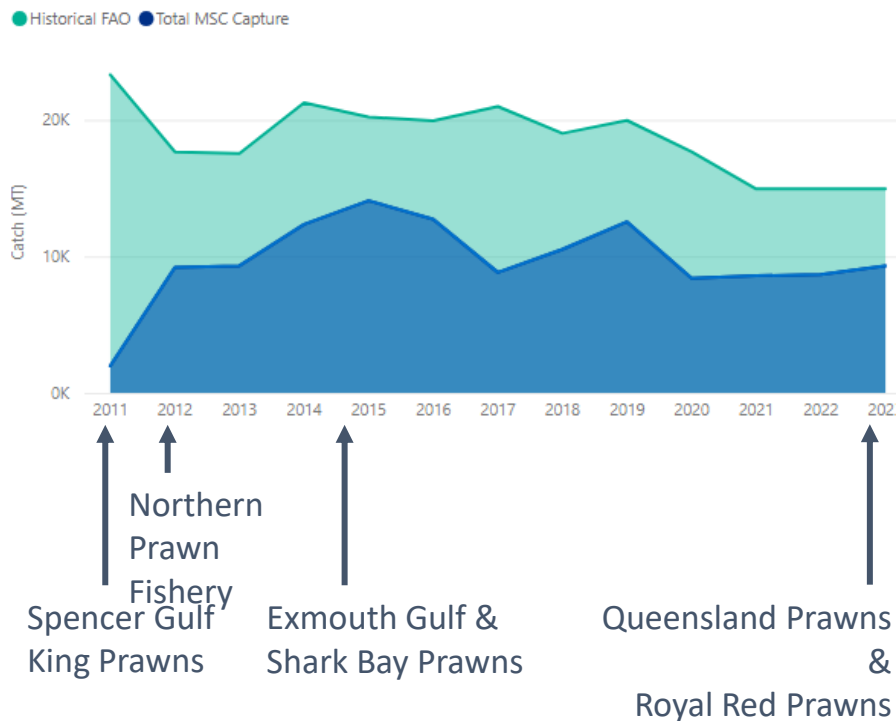


Asia: voorbeeld van diversiteit



Australia tropische Garnalen

67% Australian Wild Catch Prawns Certified



- Trawl visserij, stevige NGO opinie en discussie - license to operate
- Publieke investering – 14.5 miljoen Aus\$.
- Industrie-markt, wetenschap, overheid werken goed samen.
- 6 MSC visserijen, 11 soorten, 9,300t vangst
- 47 conditions of certification
- 21 open, 26 closed

Australian Prawns



Tom's Fish Eye – 40% bycatch reduction vs. Square Mesh Panel



Turtle Exclusion Devices – 99% reduction in Turtle interactions, 36% in Rays, 85% sponges

Jaarlijkse Kerst campagne

A PR-led campaign with chef recipes, advertising, partner activations, competitions and

storytelling

2019

2020

2021

2022

2023

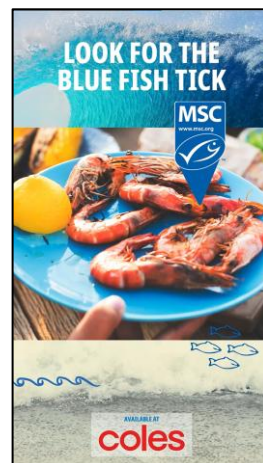
2024



Highlighting the assurance MSC brings



A good for you and the ocean too positioning



An outdoor Summer vibe post-COVID



AUSTRAL FISHERIES
SUSTAINABLE SEAFOOD

coles

Woolworths Group

Australian Council of
Prawn Fisheries

raptis
PREMIUM SEAFOOD

A combined reach of **229 million impressions** across 5 years.



THANK YOU

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Meer tools in ontwikkeling



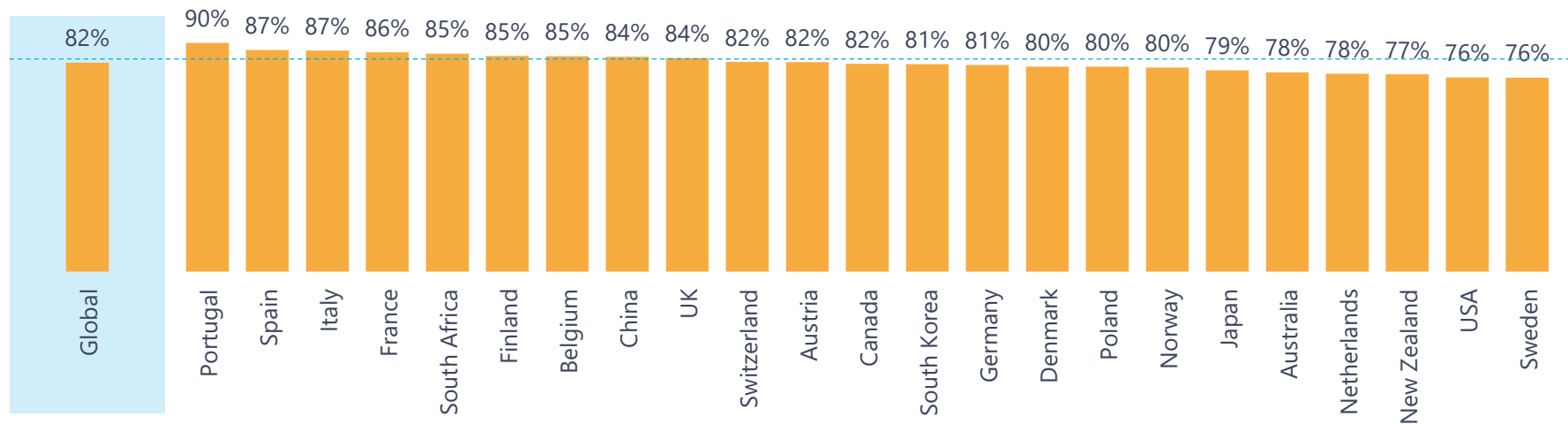
82% van seafood consumenten is zich bewust van de link tussen climate change en ocean protection

Awareness of the link between climate change and ocean protection, "describes opinion well" (5+6+7 on a 7-point scale), seafood consumers, 2024

Demographics

MSC Blues: 96%
Age 18–24: 76%
Age 25–34: 81%
Age 35–54: 83%
Age 55+: 83%

Tackling climate change includes protecting our oceans



Data-driven approach to GHG accounting in fisheries and aquaculture

Emissions are communicated according to source, GHG Protocol scope, and category and following two mainstream methods to improve consistency with extant standards

