



# Market drivers for improved fishery data

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Marine Stewardship Council

# Overview



- **Consumer survey results**
- MSC program
- Likely trends in consumer behavior
- Other market drivers on seafood industry

# 2024 GlobeScan seafood consumers survey

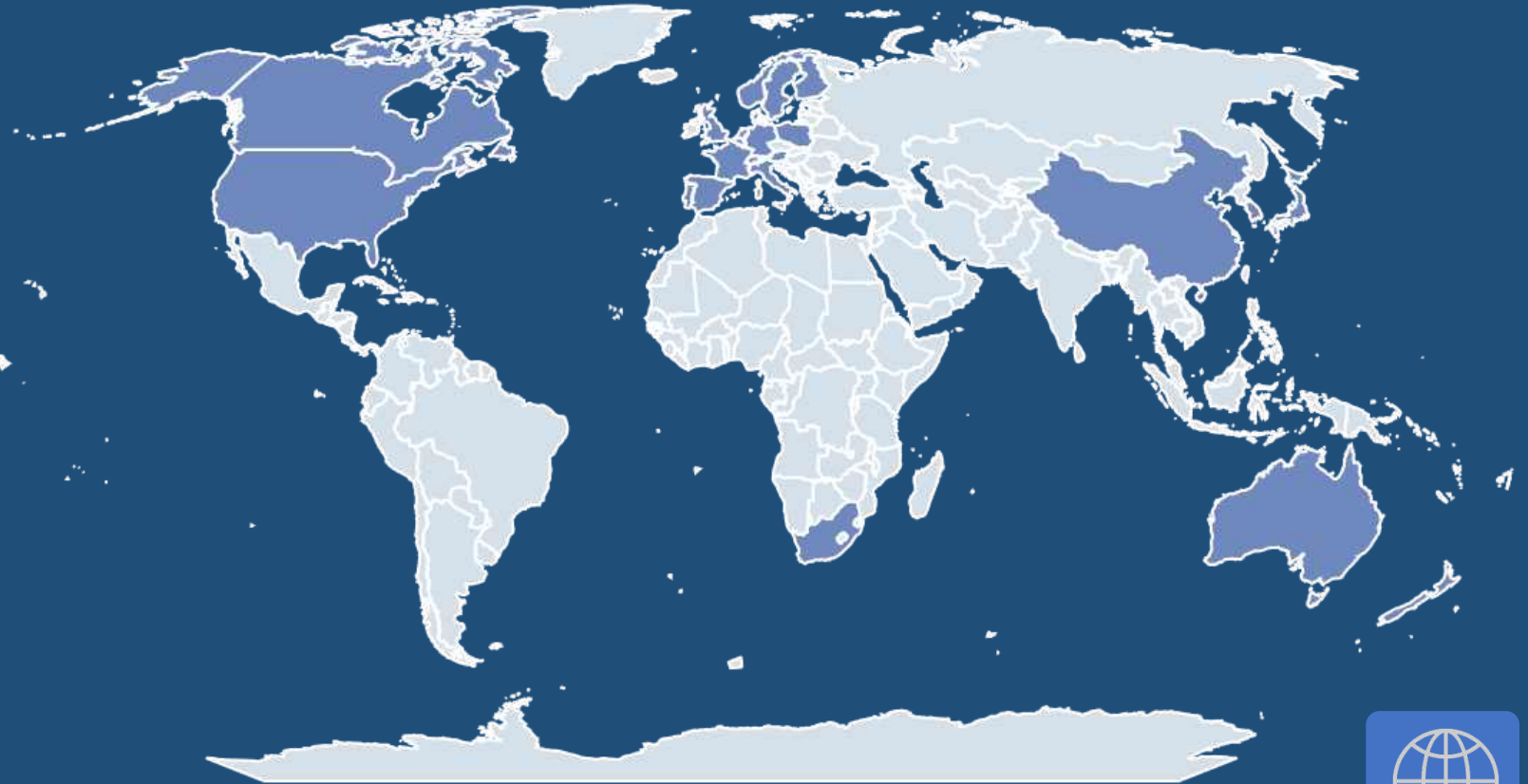


GlobeScan conducted the fifth wave of a global research study into consumer perceptions.

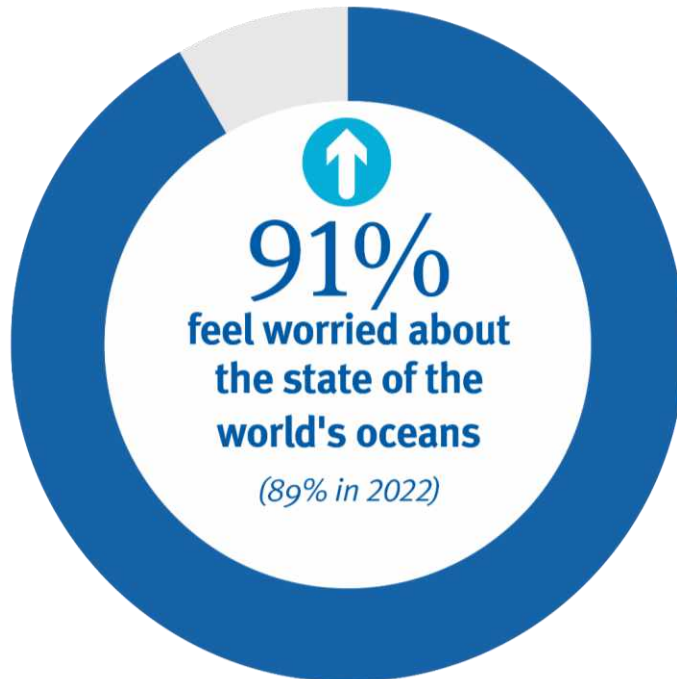


The online survey is run:

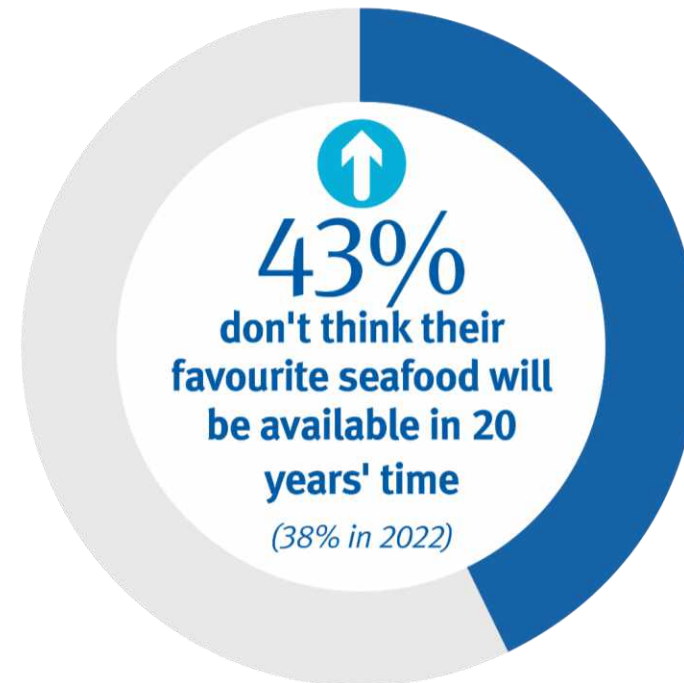
- from January – March 2024
- in 23 countries
- with 27,000 general public
- of which 20,308 are seafood consumers



# Consumer survey results



Perceptions of ocean health 'agree'



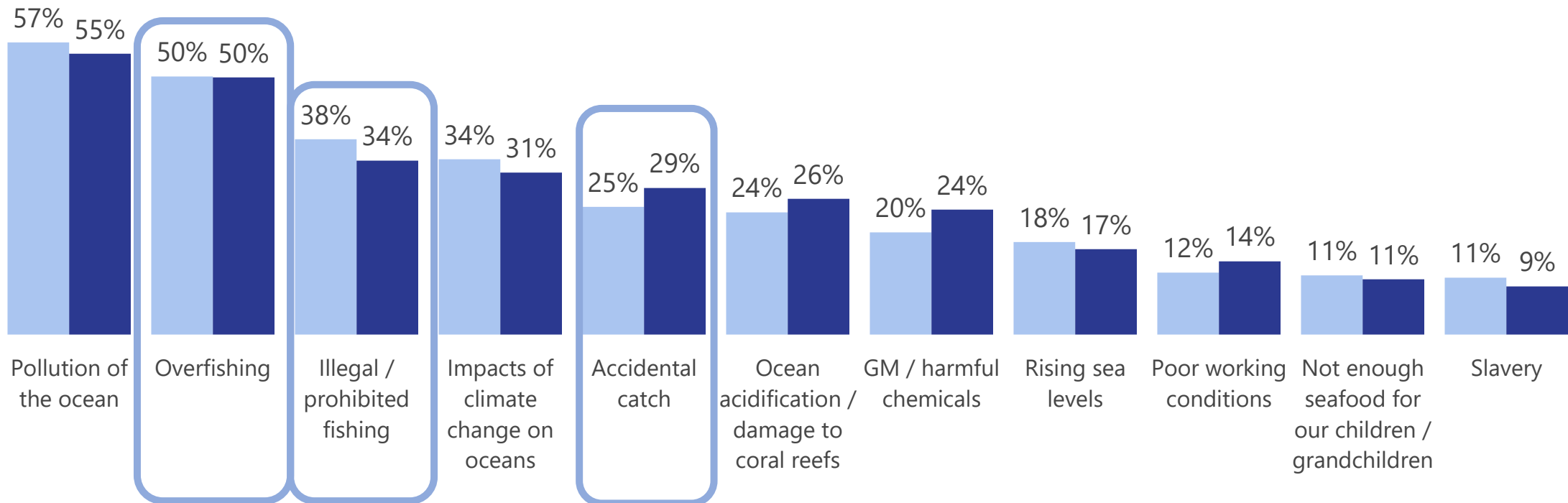
Perceptions of fish availability  
'describes opinion well'

# Consumer survey results



## Most concerning threats to the ocean?

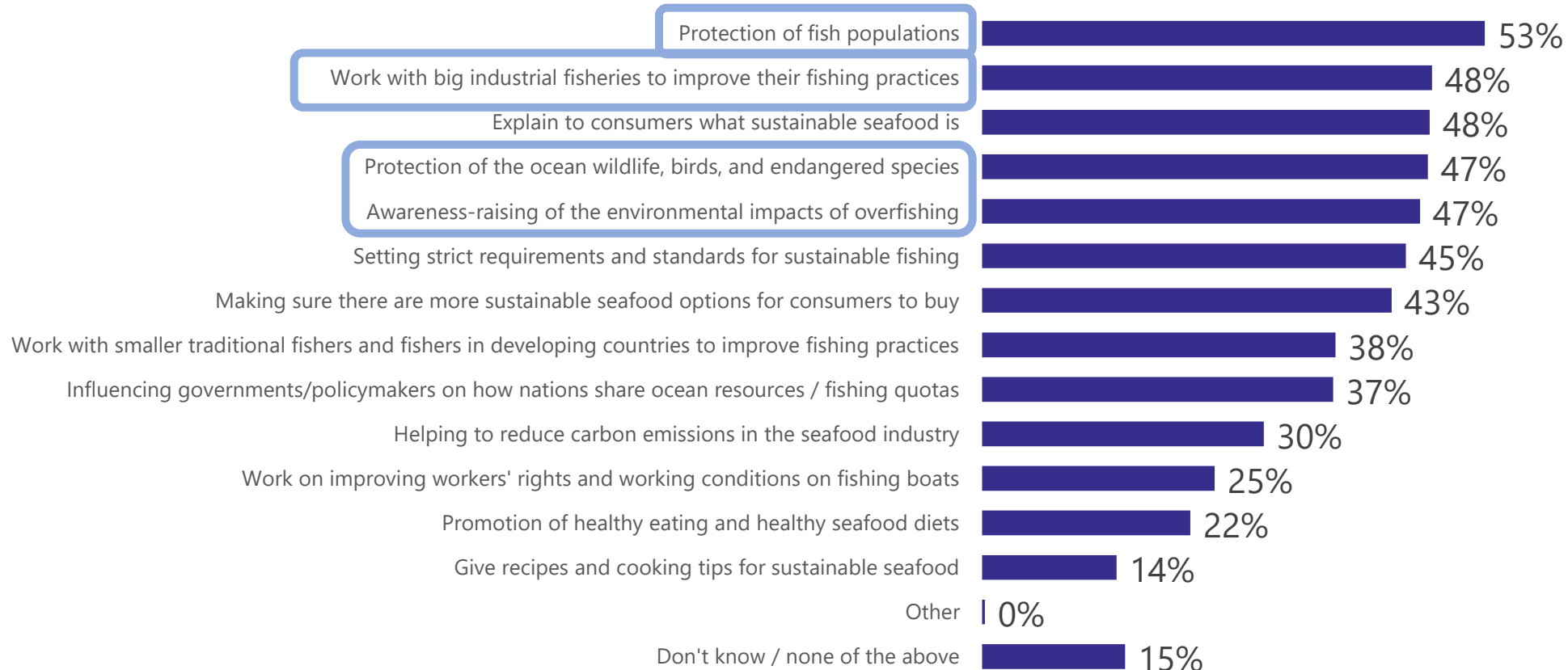
■ 2022 ■ 2024



# Consumer survey results



## What should Marine Stewardship Council do?



# Overview



- Consumer survey results
- **MSC program**
- Likely trends in consumer behavior
- Other market drivers/actors on seafood markets

# MSC program



**More fisheries** choose to improve their practices and volunteer to be assessed to the MSC Standard

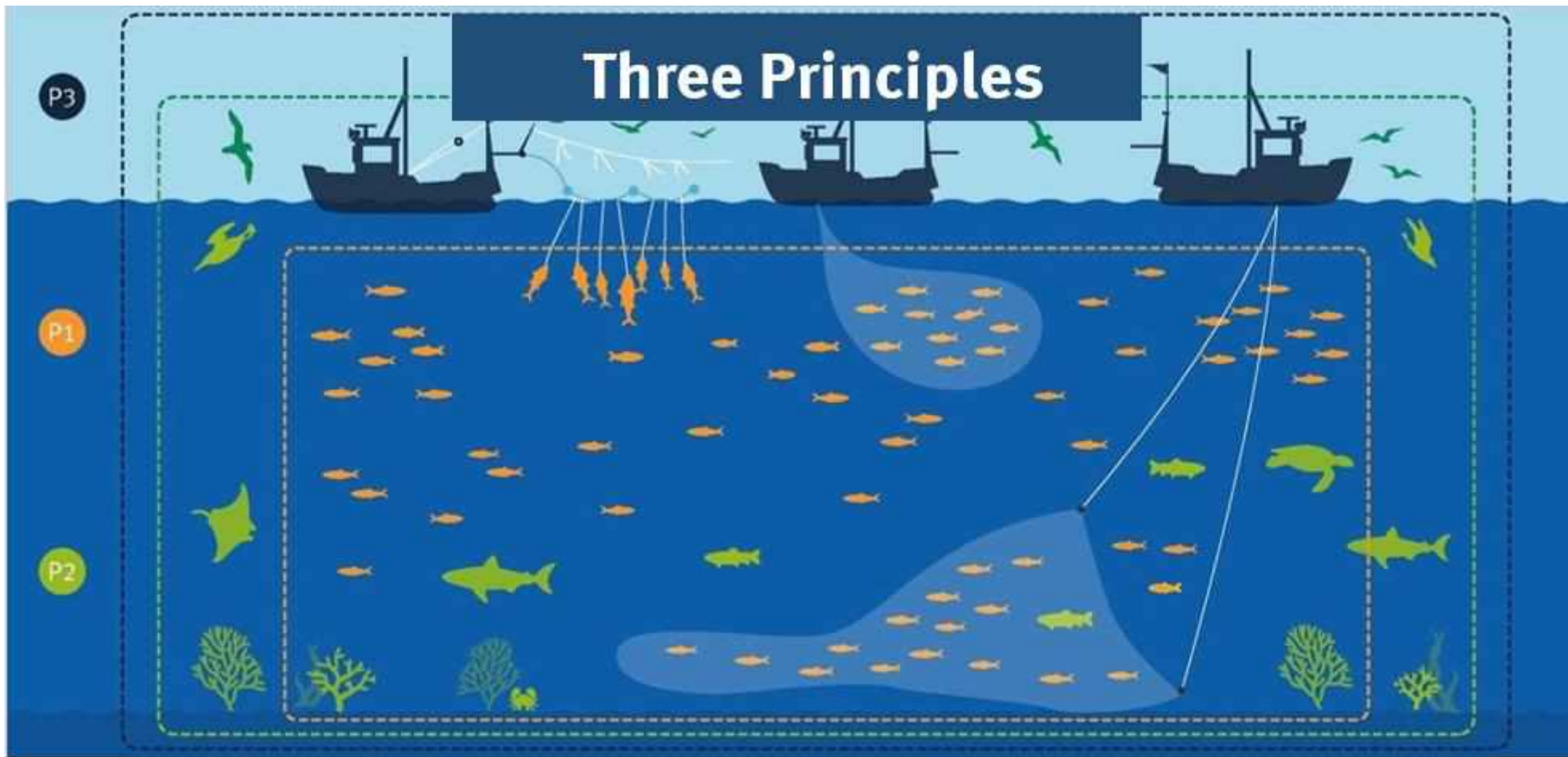
**Market demand** for MSC certified seafood increases



**Consumers** preferentially purchase seafood with the blue MSC label



# MSC Program



**P1** Principle 1  
Sustainability of the stock

**P2** Principle 2  
Ecosystem impacts

**P3** Principle 3  
Effective management

# MSC program



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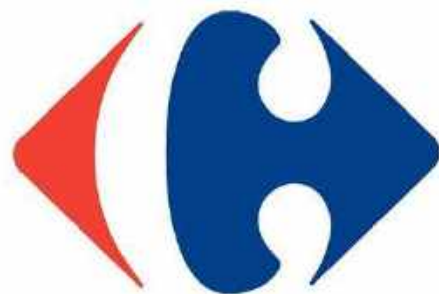
# MSC program

# Waitrose

Global Retailers



# Sainsbury's



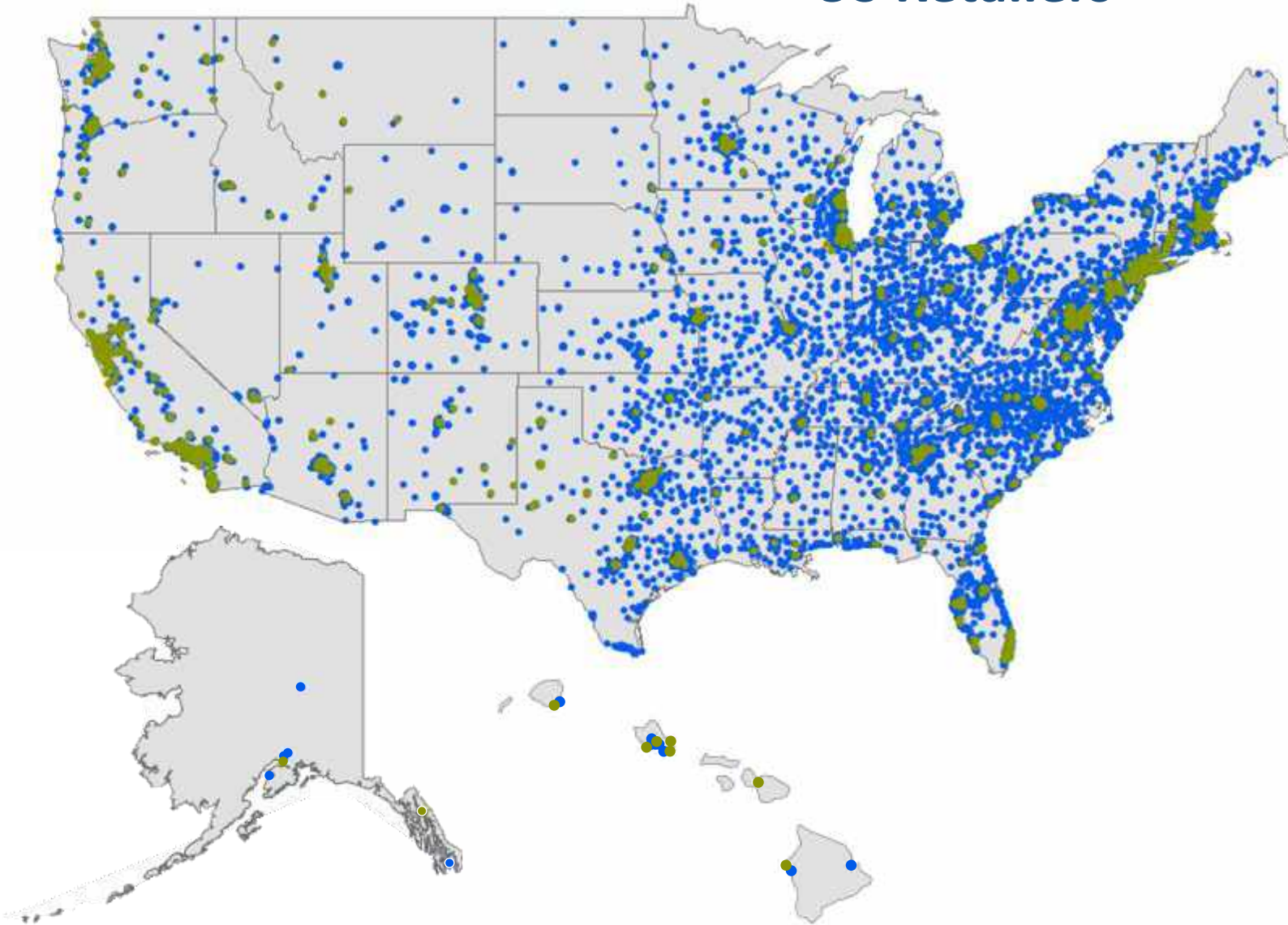
# Carrefour



# MSC program



## US Retailers



**Retailers with MSC Chain of Custody**  
Actively promote MSC certified seafood in fresh fish counters



**Retailers with commitments to source MSC Certified Products**

Actively promote pre-packaged MSC certified products with an MSC Marketing Agreement



# MSC program



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**Market demand** for MSC certified seafood increases

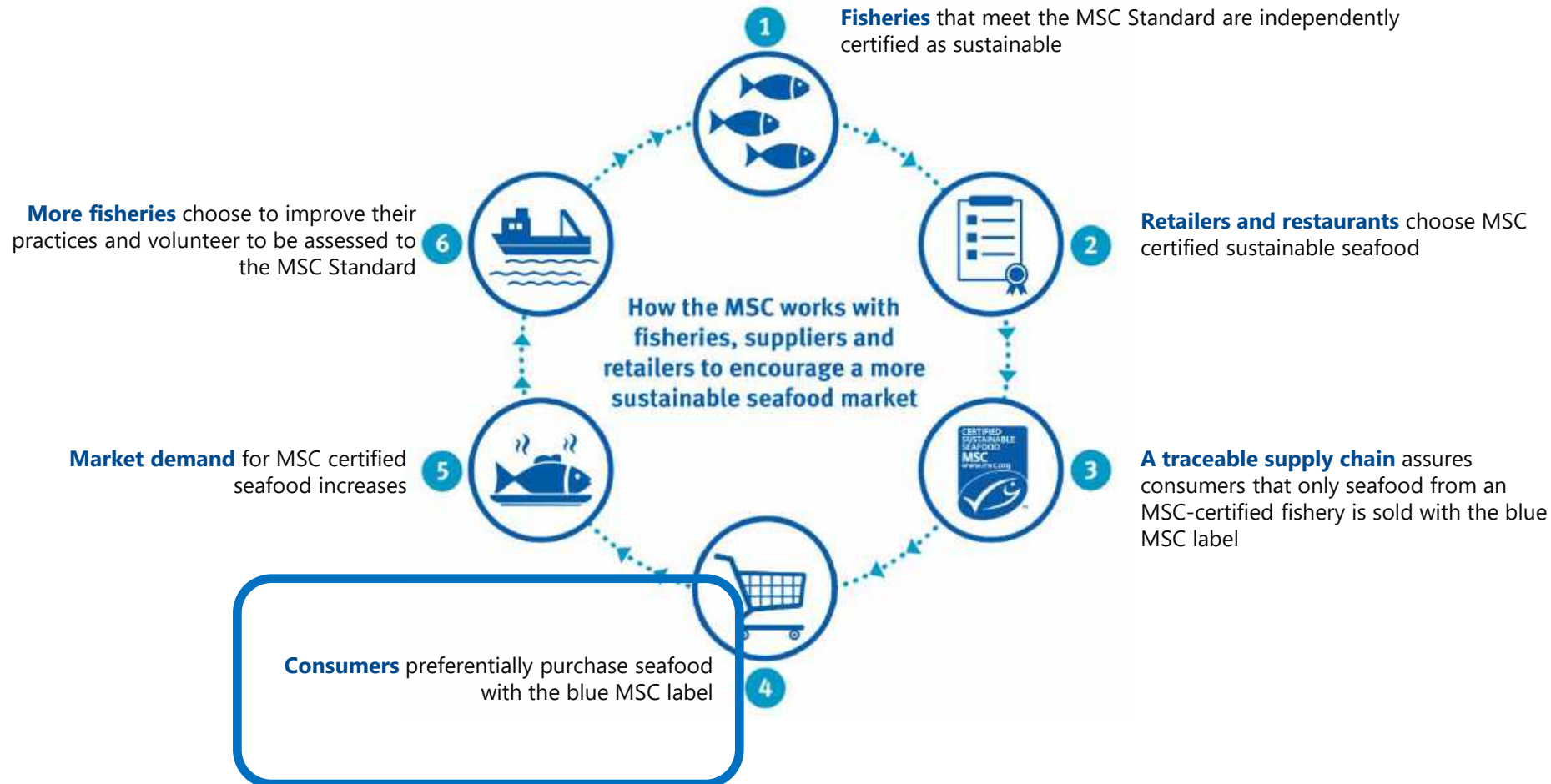


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# MSC program



# MSC program



# MSC program



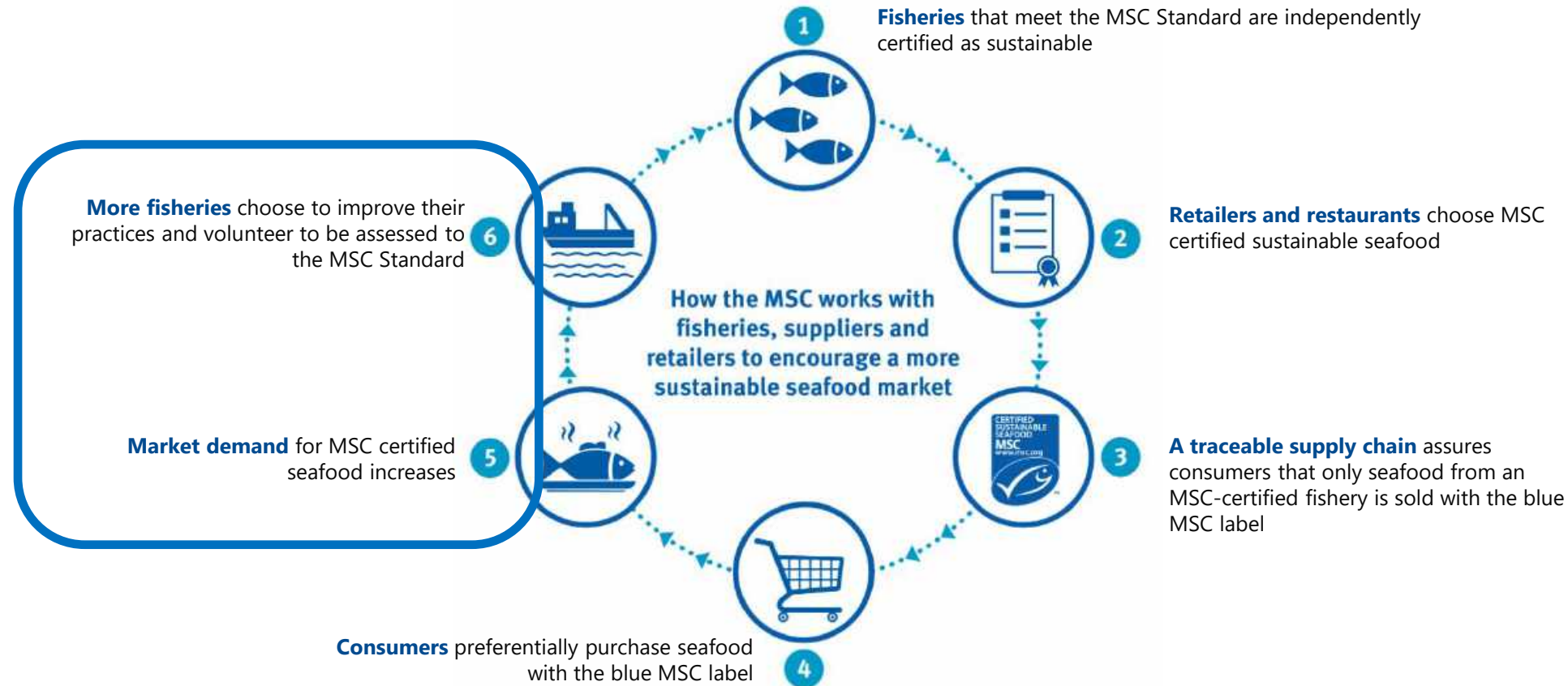
## Consumers



QR code to MSC Canada Tuna Report



# MSC program



# MSC program



- **Version 3.1, which is now released, has specific requirements for independent monitoring in fisheries**
- **All MSC certified fisheries must transition to this version by November 2030**

*Fisheries that meet the following requirements:*

- *operating on the high seas*
- *interact with endangered, threatened or protected species, or turtles and seabirds*
- *managed by a Regional Fisheries Management Organization*

*Must have 30% of trips independently monitored (onboard observers or electronic monitoring).*

# Overview



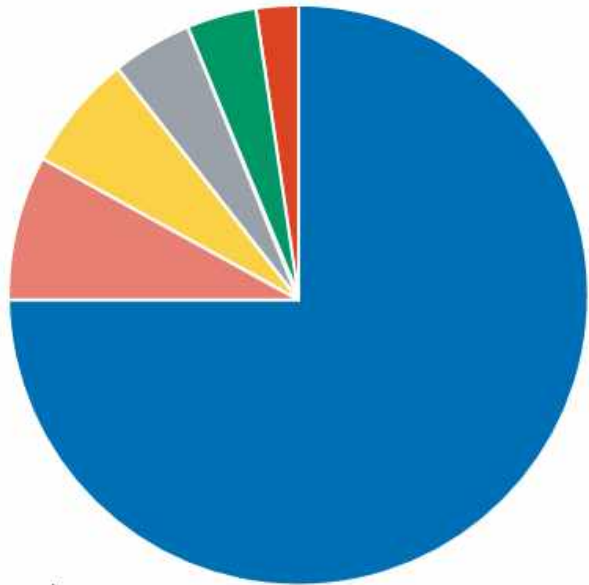
- Consumer survey results
- MSC program
- **Likely trends in consumer behavior**
- Other market drivers/actors on seafood markets



# Likely trends



MSC labelled tuna by product type, 2023/2024\*



\*April 2023-April 2024 forecast

■ Canned ■ Ready meal ■ Food to go ■ Frozen ■ Chilled ■ Pet Food

**Increased cost of living globally drives people to purchase shelf-stable, affordable options.**

**Canned tuna is one of those options.**

# Overview



- Consumer survey results
- MSC program
- Likely trends in consumer behavior
- **Other market drivers on seafood industry**
  - NGO partnerships and campaigns
  - Legislative changes
  - Industry initiatives
  - Seafood ratings



# Other market drivers - campaigns

- **Tuna Transparency Pledge: Initiative started by The Nature Conservancy to support independent monitoring across all tuna fisheries**

**Goal: 100% on-the-water monitoring of tuna fisheries by 2027**

**Walmart, Albertson's, and Thai Union are among those companies who have signed on. They will source only from fisheries that meet the goal after 2027.**

# Other market drivers - ratings



SUPPORT US

GET INVOLVED

WHAT WE DO

ABOUT US

Q SEARCH

VISIT OUR SHOP

ADOPT NOW

DONATE NOW

## Sustainable buying decisions

WWF works with retail and wholesale seafood businesses to help them make responsible decisions about purchasing farmed seafood - and to help them offer consumers more responsibly farmed seafood. Businesses communicating to their suppliers that they want responsibly farmed seafood has encouraged many farmers, in Australia and overseas, to improve their practices and take up ASC certification.

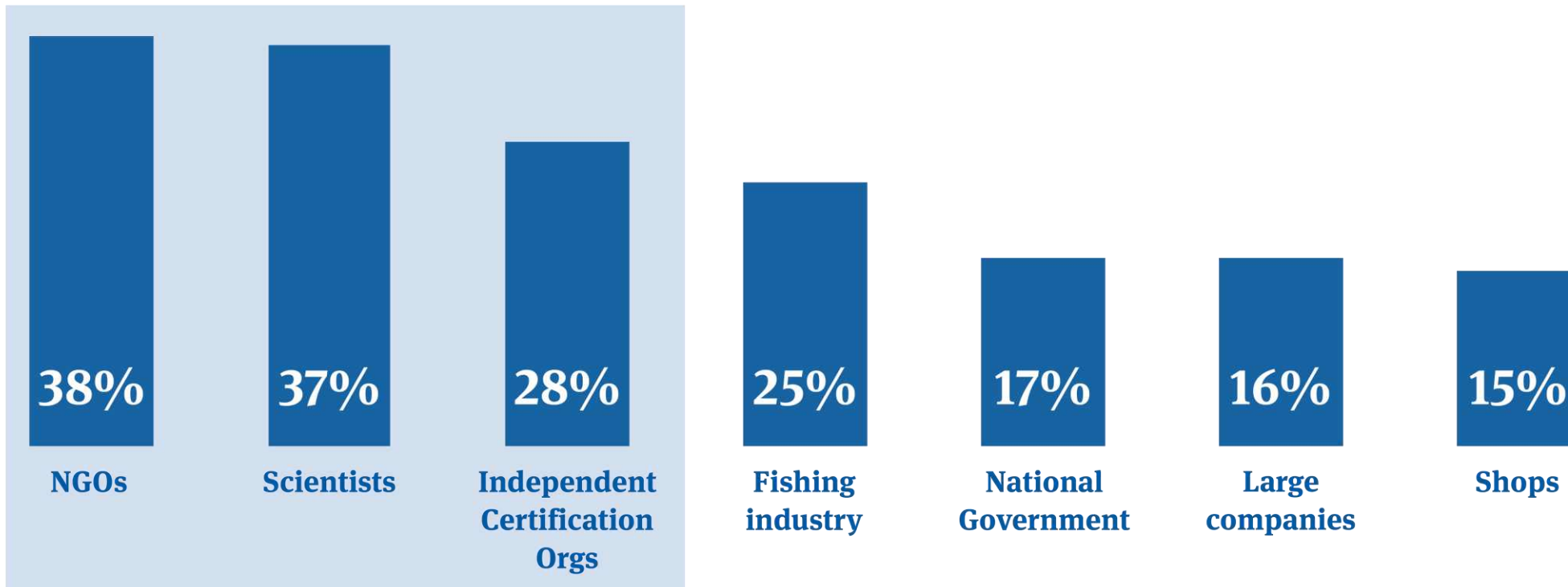




# Other market drivers/actors



How well do consumers think the following groups are contributing to protection of the ocean?





Thank you

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