



The MSC program as tool for fishmeal-fishoil producers.

Camiel Derichs, Program Development Director, MSC

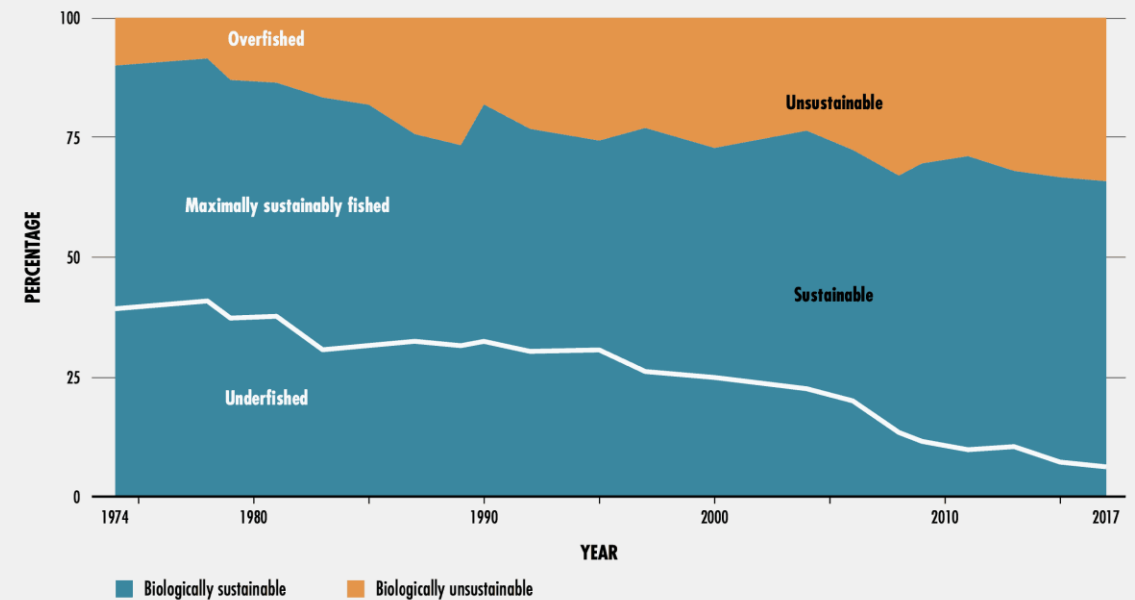
EFFOP annual meeting, 23rd September 2021

Context

Oceans are under pressure from overfishing



FIGURE 19
GLOBAL TRENDS IN THE STATE OF THE WORLD'S MARINE FISH STOCKS, 1974–2017



SOURCE: FAO.

Low confidence from civil society in the seafood industry



Fishing the Feed

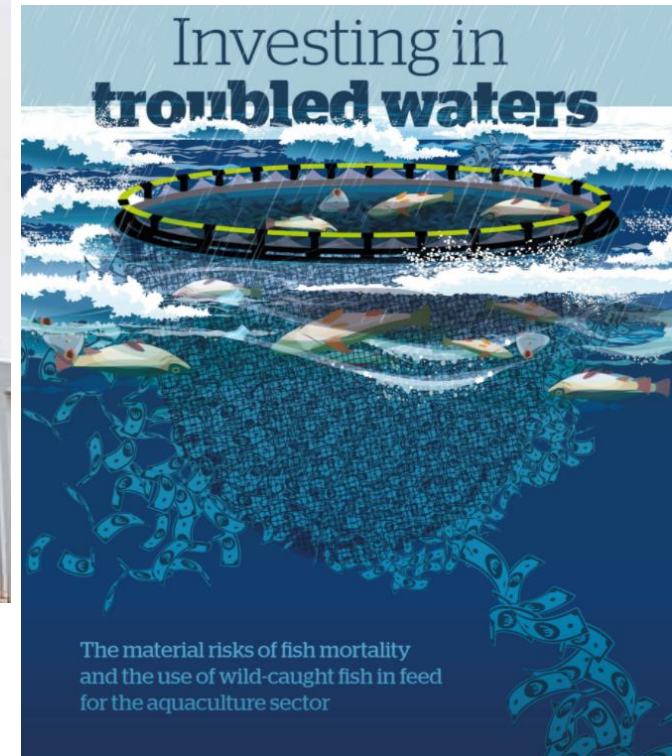
Farmed seafood is seen as a solution to the chronic overfishing of our oceans. But under the surface lies one of the most unsustainable industrial practices on the planet.

[FIND OUT MORE](#)

Changing Markets Foundation
campaign 2019-present



Greenpeace actions 2020



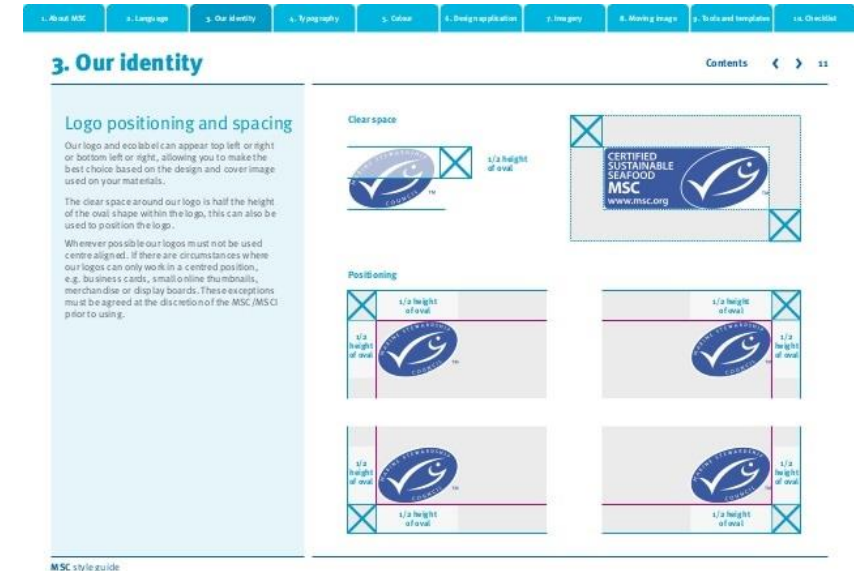
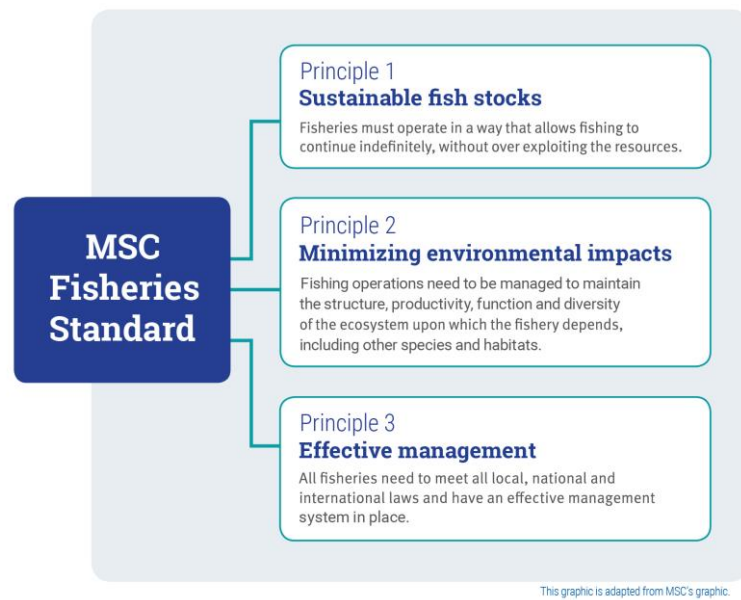
Planet tracker report 2021

Solutions:

- SDGs set shared global goals and targets
- Need for Public & Private collaboration.
- Key role for credible global performance standards and certification systems.
- MSC specifically mentioned in SDG 14 Preparatory papers



MSC program covers the entire supply chain



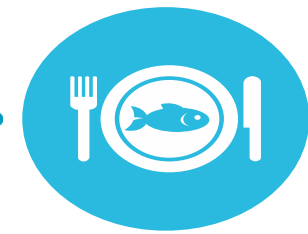
Fishery
Certification



Chain of Custody
Certification



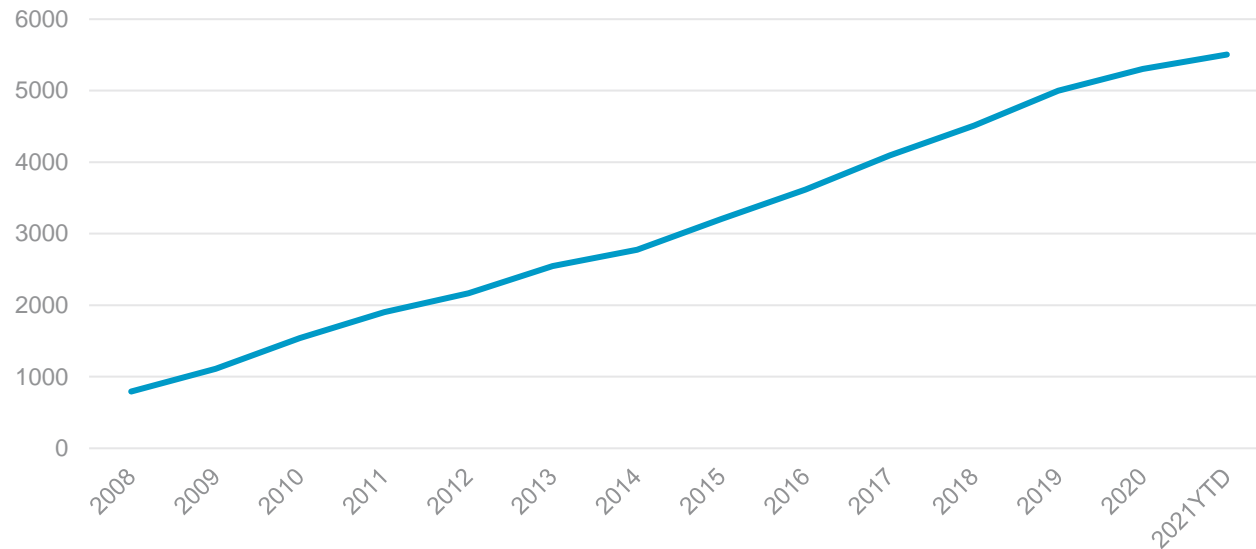
Ecolabel
Licensing



Consumer
Product



MSC Chain of Custody certificates



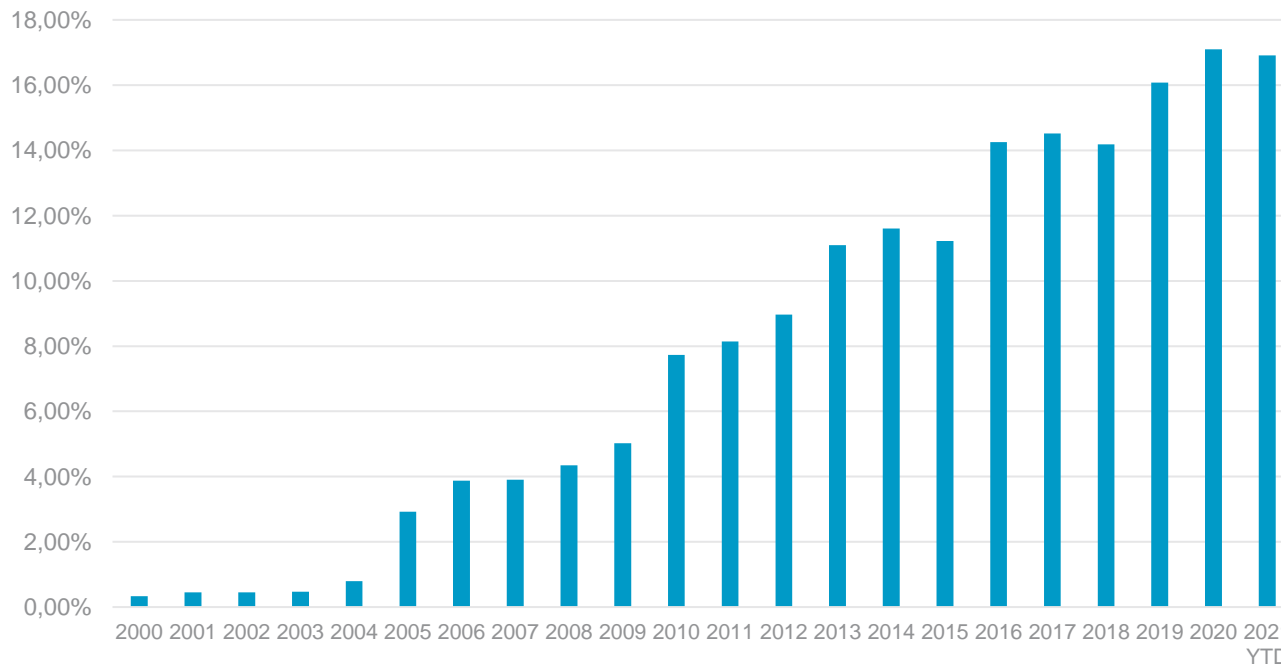
Circa 5200

Companies hold traceability certification, covering >30,000 locations

Subject to

unannounced auditing, DNA testing, Mass balance reconciliation, annual surveillance.

Historical MSC Capture Percentage of FAO



Some 12-14

million MT of seafood caught by certified fisheries

Ca. 15-17%

of the total global wild-caught seafood supply is certified

About 2-3%

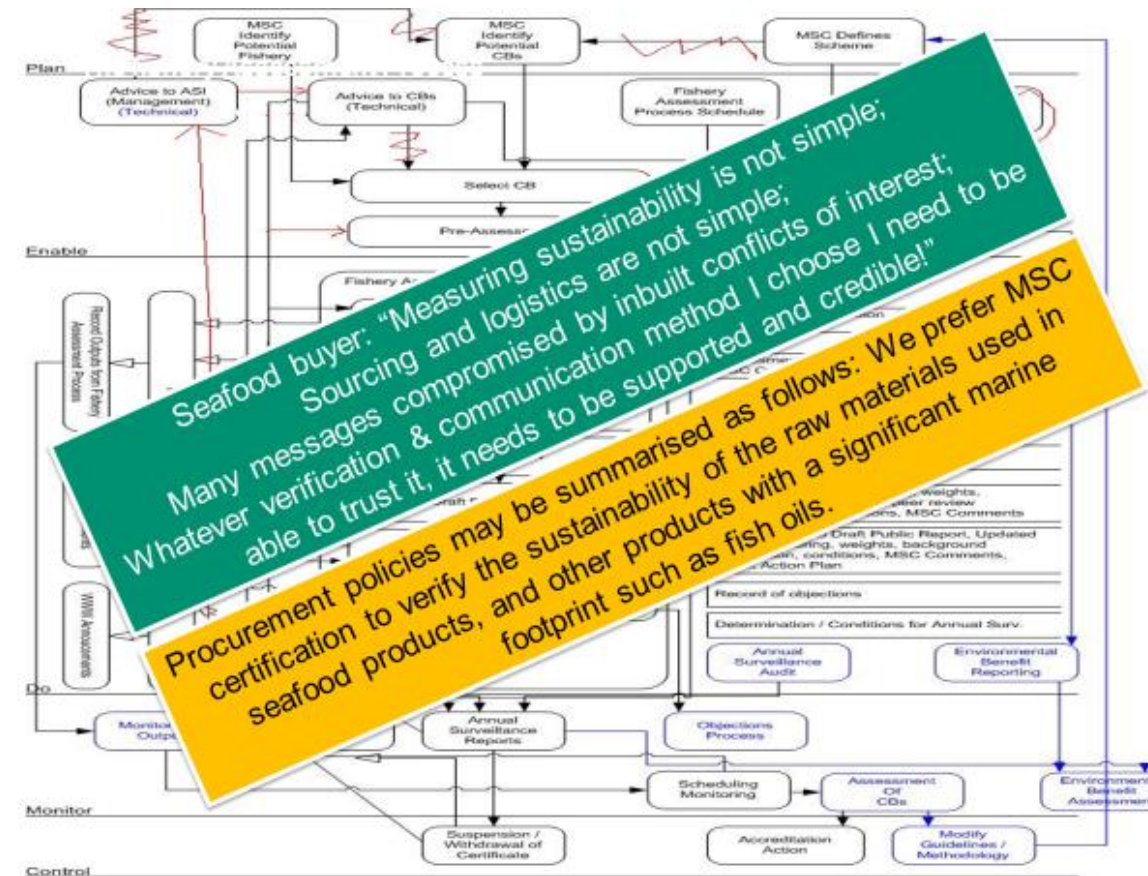
of the total global wild-caught seafood supply is in Full Assessment

Ca. 15%

of the total global wild-caught seafood supply is in Pre-Assessment

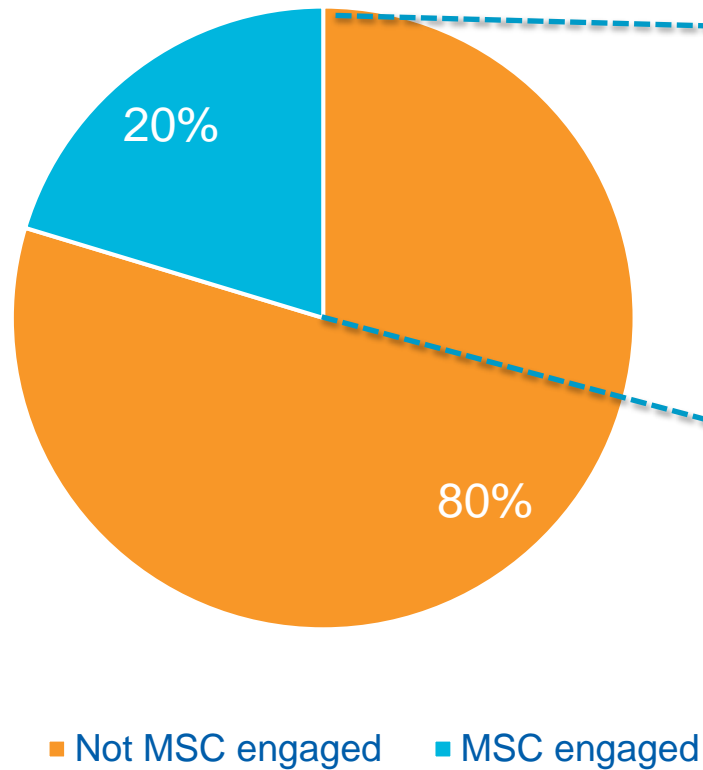
Drivers, i.e. value proposition

- Market demand for sustainable products, and hence credible sustainability verification
- Desire to improve management, to ensure more stable supply
- Reputational gains, collaboration platform
- Easier or preferential access to capital
- Positioning vs new protein/O3 ingredients

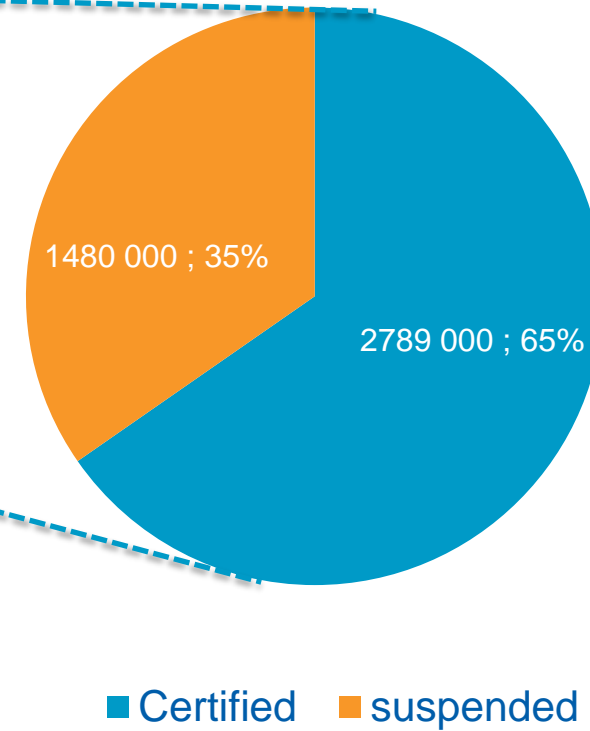


MSC engagement RM for FM/FO

Global RM for FM/FO in MSC program

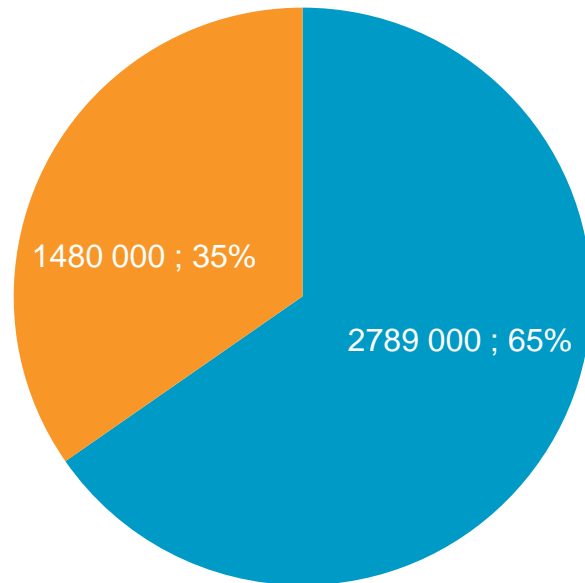


Est. Volume MSC certified for reduction 2021



MSC engagement RM for FM/FO

Est. Volume MSC certified for reduction 2021

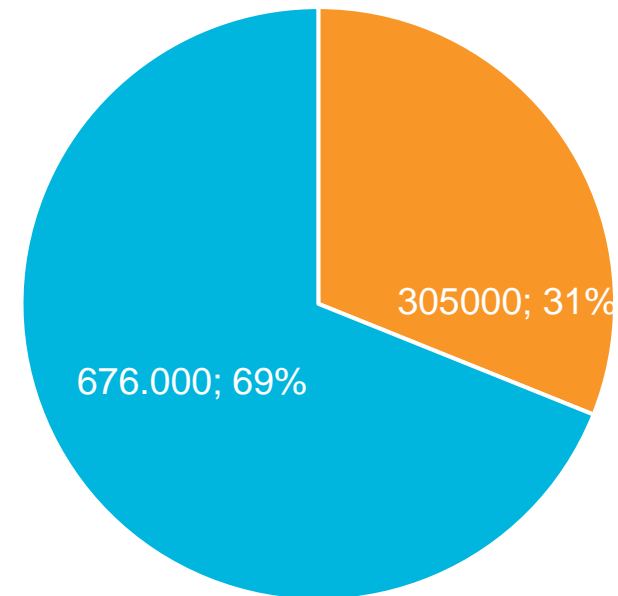


■ Certified ■ suspended



**Est. 23% of MSC
Cert. RM available
for FM/FO trimmings**

Est. Trimmings



■ Trimmings suspended ■ Trimmings non-suspended

Trimblings or valuable products?



- We observe increasing value for by-products, not just use for meal and oil, also enzyme extraction, collagens, colourants, skin leather etc.
- Trimmings are not 'per definition' sustainable: If source overfished or poorly managed its not sustainable. → 'Good use'....of unsustainable product?
- Approach taken by MSC functions well. Cert. scope (over-time) broadens to cover most/all key species in the mix.
- Added complexity emerges *when suspensions happen*, CoC segregation requirement may than become a challenge in FM/FO production.





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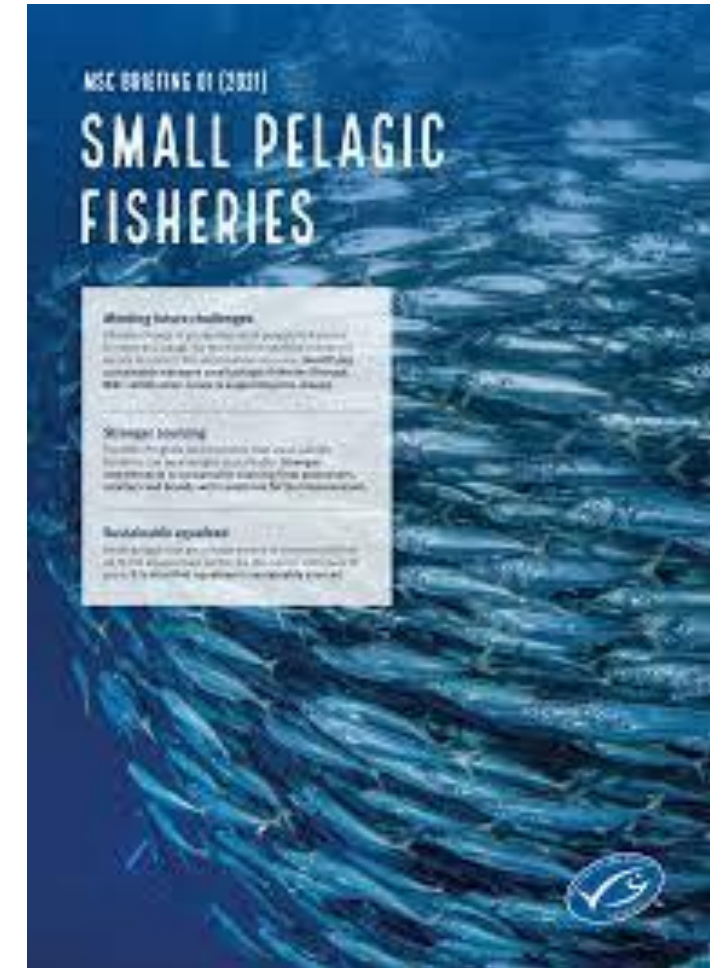
doi:10.1017/S0022292412001507

Table 10.10: \mathcal{H}^1 -norm of the error $\|u - u_h\|_{\mathcal{H}^1}$ for \mathcal{H}^1 -conforming and nonconforming elements

Does certification contribute to sustainable fisheries in Europe?



- Well documented that robust performance standards and assurance systems incentivise improvements in industry performance.
- 2000+ (2020) Improvements documented in MSC certified fisheries. Many improvements catalysed also in Europe, and many conditions are being closed by fisheries.
- BUT, more needs to happen. Sometimes fisheries fail, or don't deliver progress in time to maintain certification.



C&O reflections

- Can key LTL species be sustainably fished, and/or used for meal/oil production? → Yes, but need to collaborate to message this!
- Need for more efficiency in CoC auditing, and higher levels of assurance. → Digital platform and pilots in 2021, explore collaboration with other standards.
- Developing world particularly hard challenge due to lack of capacity in institutions; data-science, control and enforcement → ITM, PPA approach, OSF



The background of the slide is a photograph of a fish, likely a salmon, lying on a bed of crushed ice. The fish is positioned horizontally, with its head to the right and tail to the left. The scales are detailed and glistening. The ice consists of many small, irregular chunks. A semi-transparent teal banner is overlaid on the bottom half of the image, containing the text "Questions?".

Questions?