



Attending:

- Nicole Kunin, MSC
- Camila Flanagan, MSC
- Nicolas Cruz, Golden Omega
- Sarah Christianslund, Epax
- Auður Emilsdóttir, Lysi
- Jonas Törnquist, Natural Pharmaceuticals
- Wenche Uksnøy, Blue Legasea
- Majorie van Kuik, Minami/Nestle
- Ben Arceneaux, Nutrasource
- Marianne Maehlum, Zooca
- Jolie Root, Carlsol Laboratories
- Ove Wikstrom, BASF
- Kelly Han, Supplement Certified
- Gerhard K. Kohn, Vesteraalens
- Lauren Jensen, Eqology
- Michael Royko, BASF
- Katrina Benedicto, Nuseed
- Chelsea Broderick, Nature's Way
- Christophe Godard, Olvea
- Lucie Lingrand, Fermentalg
- Johanna Boese, Imperial Oel
- Jenna Ritter, Nature's Way
- Camilo Cuadra, SPES
- Simran Shergill, Nature's Way
- Baldur Hjaltason, Pharma Marine
- **GOED:** Ellen Schutt, Vicky Lin, Chris Gearheart

Agenda:

- **Watch the call here:**
 - [Click to watch the video](#)
 - Passcode: =5NQyur1
 - **Follow along with the slides below** 
- **Committee housekeeping**
 - Vicky: Please [fill out our survey](#) on *The GOED Current*. The *Current* is itself a highly valued benefit of membership and the main way of finding out about other GOED benefits and developments. Giving your feedback will improve the value of your membership; [fill out the survey today](#).
 - Vicky: Remember that Global Omega-3 Day (March 3) is coming up fast. [Please visit this page](#) if you're interested in getting involved.

- **Presentation**

- **Topic:** A new round of consumer surveys on sustainability and seafood/marine products from GOED member the [Marine Stewardship Council](#) (MSC).
- **Follow along with MSC's slides below** 
- Introduction to MSC and Sustainability in the Supplement Aisle:
- Global MSC Market Insights:
 - 580% growth in MSC-labeled supplement products over 12 years.
 - Overview of certified omega-3 supplements globally, segmented by species and brands.
- Insights into the Sustainable Supplements Consumer:
 - Key findings from the 2024 GlobeScan survey covering 27,000+ consumers across 23 markets.
 - Consumer attitudes toward sustainability, ecolabels, and dietary motivators.
- Communication and Marketing Opportunities:
 - Strategies for engaging with supplement shoppers, emphasizing sustainability as a value proposition.
 - Preferred media channels and messaging themes by region.
- MSC Awareness and Label Impact:
 - Statistics on recognition, understanding, and trust in the MSC label among supplement shoppers.
 - Influence of the MSC label on purchase likelihood.
- Consumer Motivators for Omega-3 Products:
 - Environmental sustainability, health, and economic factors driving dietary choices.
- MSC Dashboard and Tools:
 - Overview of the Supplement Partner Toolkit, including customizable social media templates and visual assets.
 - Earth Month 2025 campaign initiatives.

- **Discussion / Q&A**

- Ellen asked Nicole about the sources of MSC-certified anchovy fisheries, specifically products from the anchovy fishery.
 - Nicole clarified that the certification did not include the Peruvian anchovy fishery but likely involved a certified fishery in Morocco. She also highlighted the potential future certification of the Peruvian fishery.
- Ellen inquired about Slide 12, asking if there were differences in environmental concerns between supplement shoppers and non-shoppers.
 - Camila confirmed the data exists and offered to provide detailed breakdowns by region and globally, highlighting that supplement shoppers prioritize ocean health more than the general consumer base.
- Ellen asked if the MSC survey included responses about not taking supplements due to ocean concerns.
 - Camila clarified that the survey does not include such questions but welcomed suggestions for future surveys.
- Audur, from Lysi, asked about using MSC resources and the definition of being an MSC partner.
 - Nicole explained the requirements for partnership, including certifications (fishery and chain of custody) and the process to access marketing resources. She assured Audur that MSC could support their marketing needs as a certified partner.
 - Audur clarified their company's status as part of the chain of custody and expressed interest in accessing marketing materials.
 - Nicole offered to connect them with the appropriate commercial partner in Iceland to facilitate collaboration.

- **Next calls for both committees**

- Communications — February 18, 2024 | [\[Click for your local time\]](#)
- Sustainability — February 19, 2025 | [\[Click for your local time\]](#)



GOED Communications and Sustainability Joint Committee Call

Main Topic: New GlobeScan Consumer
Survey Data from MSC on
Sustainability-Certified Marine
Products

January 22, 2025

Agenda

Committee housekeeping

- Newsletter Survey
- Global Omega-3 Day

Presentation

- **Topic:** A new round of consumer surveys on sustainability and seafood/marine products from GOED member the [Marine Stewardship Council](#) (MSC).

Discussion / Q&A


Next calls for both committees

- Communications — February 18, 2024 | [[Click for your local time](#)]
- Sustainability — February 19, 2025 | [[Click for your local time](#)]

Agenda

Committee housekeeping

- Newsletter Survey



GOED Weekly Newsletter Feedback

Help Us Improve Our Weekly Newsletter

At GOED, we're committed to keeping our members informed and engaged. Our weekly newsletter *The GOED Current* is designed to provide you with timely updates on GOED's initiatives, as well as the latest trends, news and issues in the omega-3 industry.

As one of our most important communication tools, we want to ensure the newsletter continues to meet your needs and deliver meaningful insights, so we're inviting your input. Your feedback will help us evolve and improve this resource.

Please take a few moments to share your thoughts by completing our short survey.

Here are two example editions of our newsletter:

- [December 9, 2024 GOED Current](#)
- [November 25, 2024 GOED Current](#)

chris@goedomega3.com [Switch account](#)

* Indicates required question

Email *

Your email

Overall, how would you rate GOED's weekly newsletter out of five stars? *




Agenda


Committee housekeeping

- Global Omega-3 Day



Viewing in English

[What are omega-3s?](#)[Why do you need them?](#)[How Much do you need?](#)[More omega-3 info](#)



Global Omega-3 Day

March 3 (03-03) is Global Omega-3 Day™

This day is an important annual milestone to:

- call attention to EPA and DHA omega-3s,
- share details about their important health benefits, and
- highlight why people need to increase intake.

Toolkit and Resources

How You Can Be A Part of This Annual Celebration

- **Share information** about EPA and DHA omega-3s to consumers via your social media channels. Use the Key Messages below, our [Sample Social Media Posts](#) and Graphics in [this toolkit](#) for inspiration.

Agenda

Presentation

- **Topic:** A new round of consumer surveys on sustainability and seafood/marine products from GOED member the [Marine Stewardship Council](#) (MSC).



Sustainability in the supplement aisle: Dive in with the MSC

January 2025

MARINE STEWARDSHIP COUNCIL (MSC)



**Sustainable fish
stocks**



**Minimizing
impact**



**Effective
management**



Speakers



Camila Flanagan
Marketing Manager,
MSC US



Nicole Kunin
Commercial Manager,
MSC US,

Agenda

- **Introductions**
- **Global MSC Market Insights**
- **Insights into the Sustainable Supplements Consumer**
- **Communication and Marketing Opportunities**
- **Questions?**



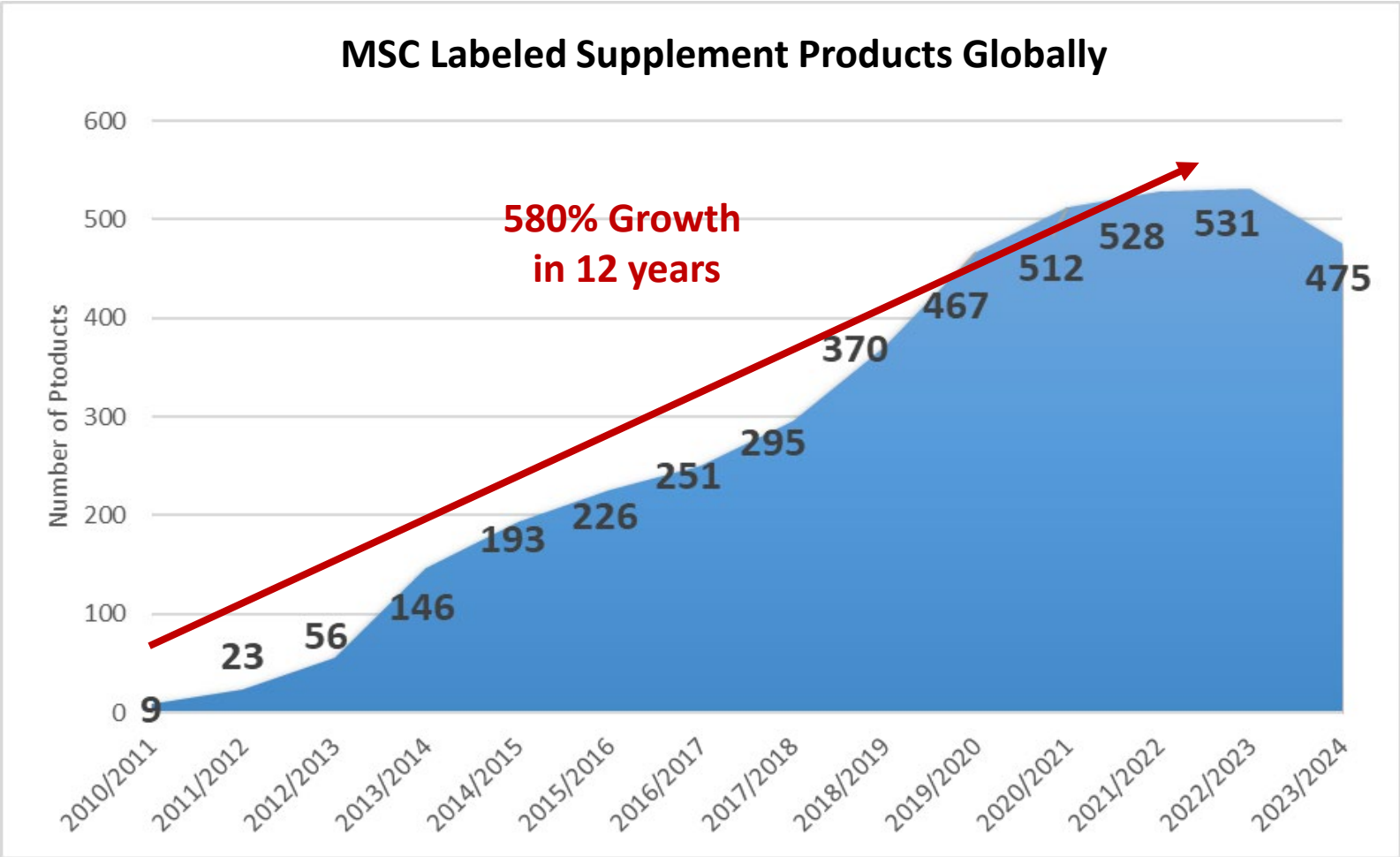
Global MSC Market Insights – Supplements



MSC Certified Omega-3 Supplements



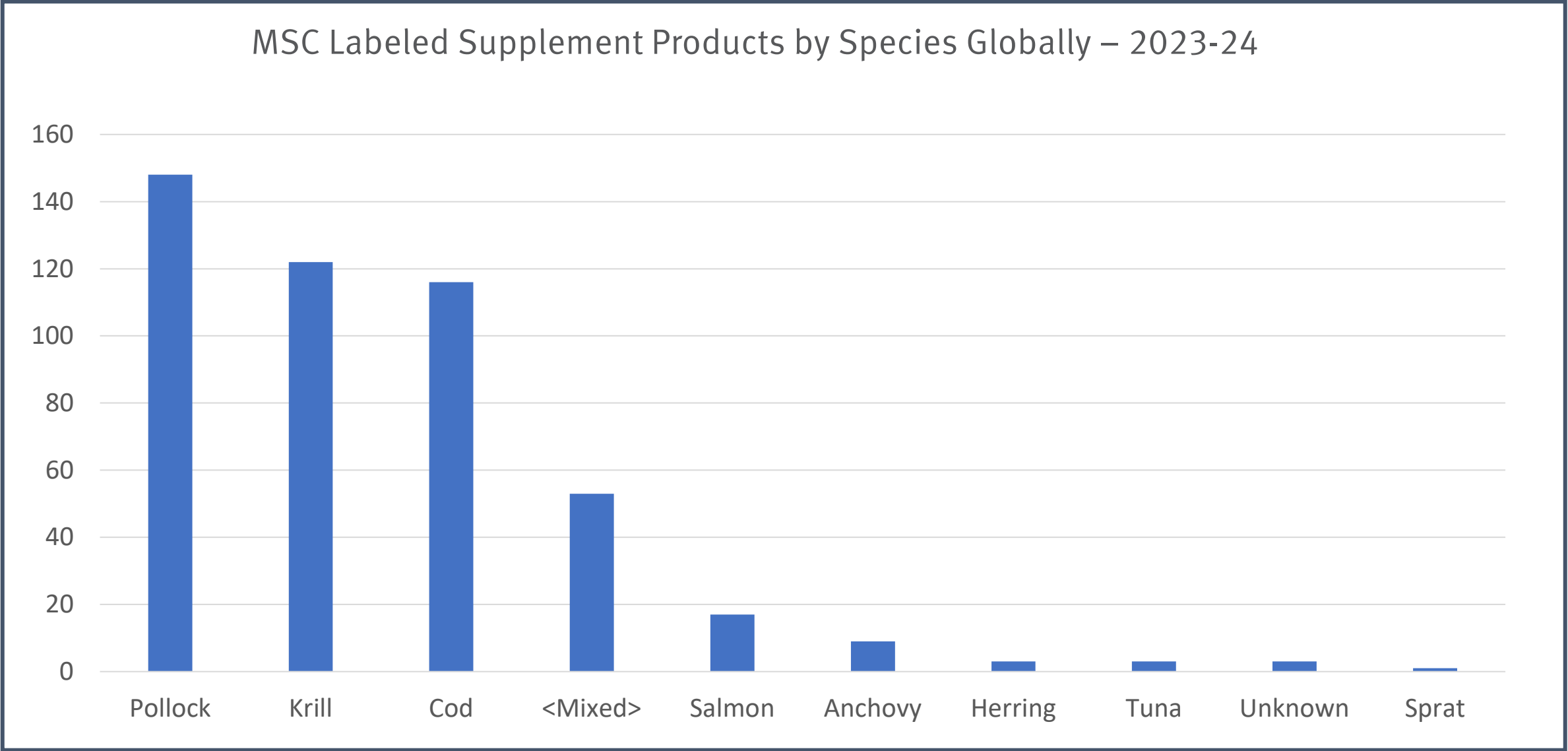
Updated: Jan 21, 2025



MSC Certified Omega-3 Supplements



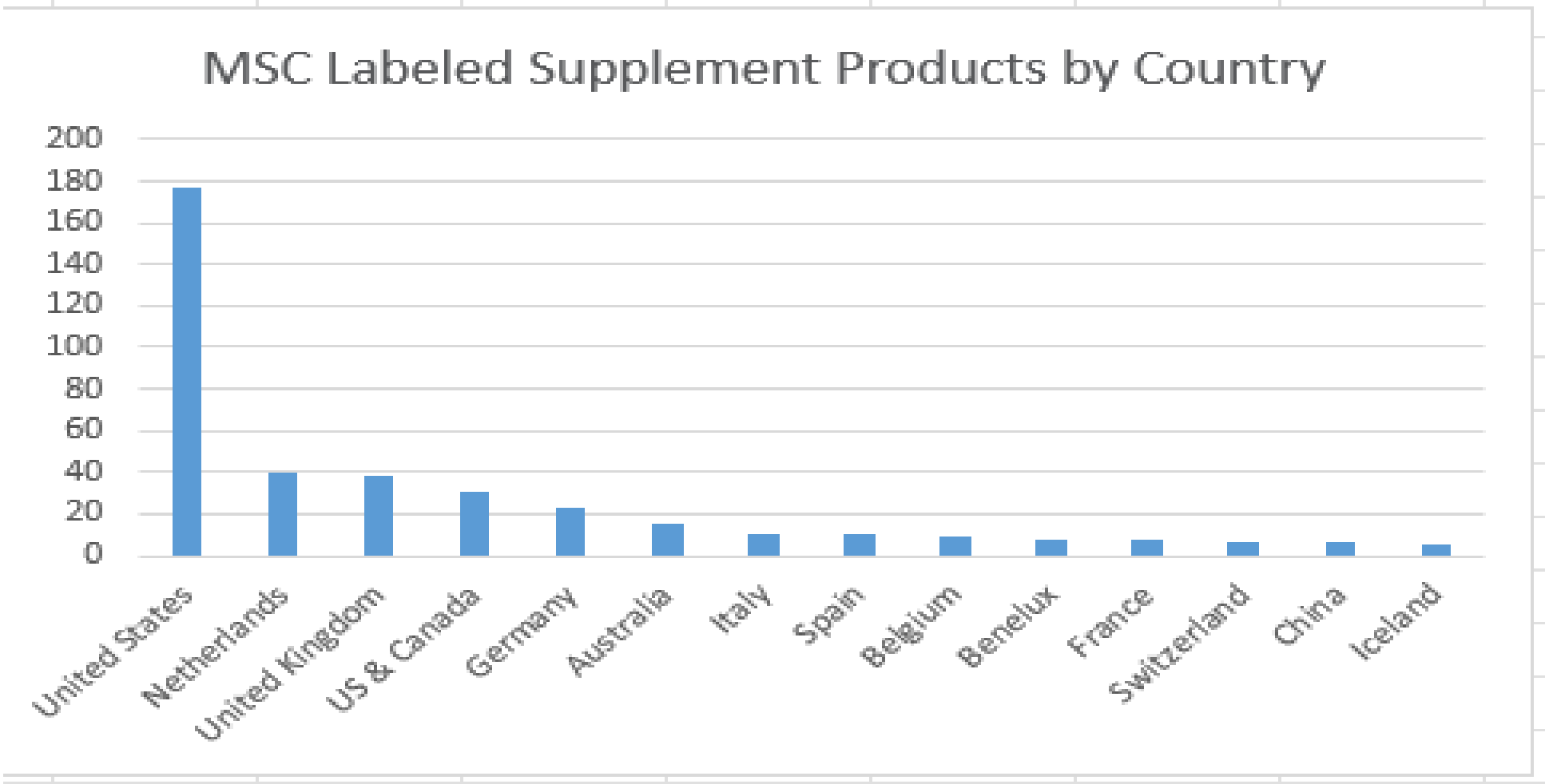
Updated: Jan 21, 2025



MSC Certified Omega-3 Supplements



Updated: Jan 21, 2025



MSC Certified Omega-3 Supplements

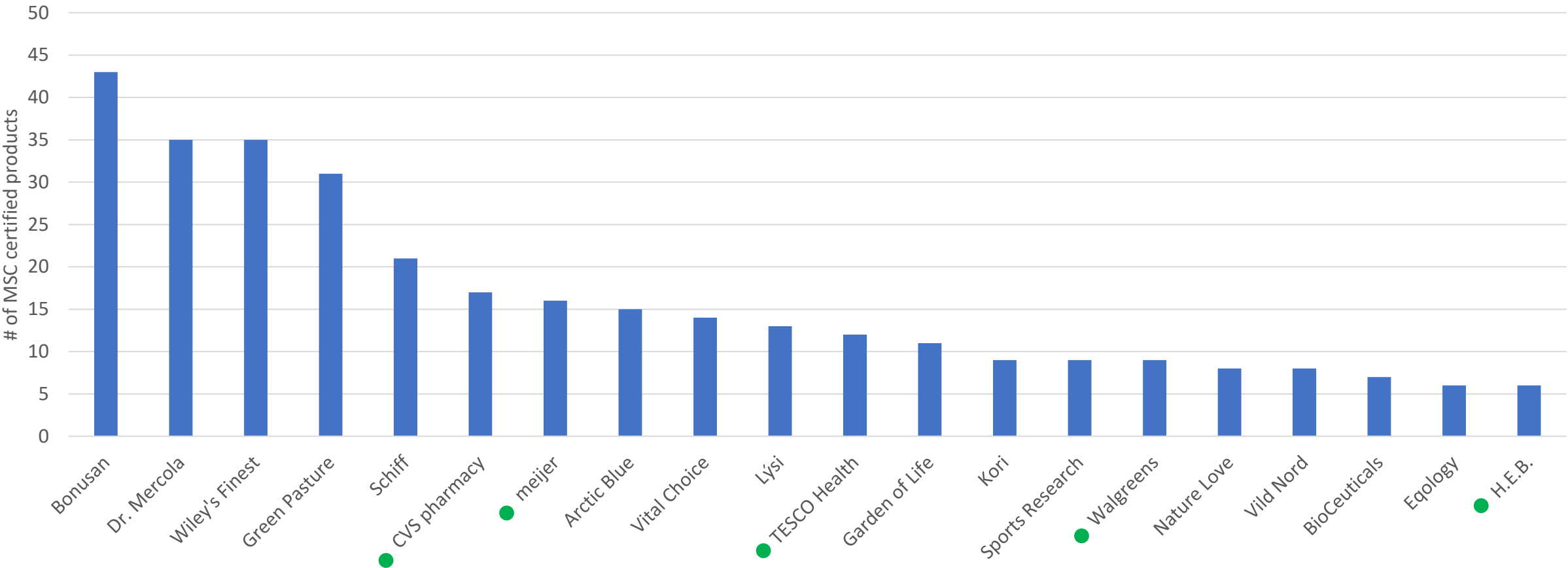


Updated: Jan 21, 2025

MSC Supplement Products for Top 25 Brands (Global)

Financial Year ● 2020/2021 ● 2021/2022 ● 2022/2023 ● 2023/2024

MSC Certified Omega-3s: Top 20 Brands



INSIGHTS INTO THE SUSTAINABLE SUPPLEMENTS SHOPPER

**MSC & GlobeScan study of
seafood consumers - 2024**

Prepared January 2025



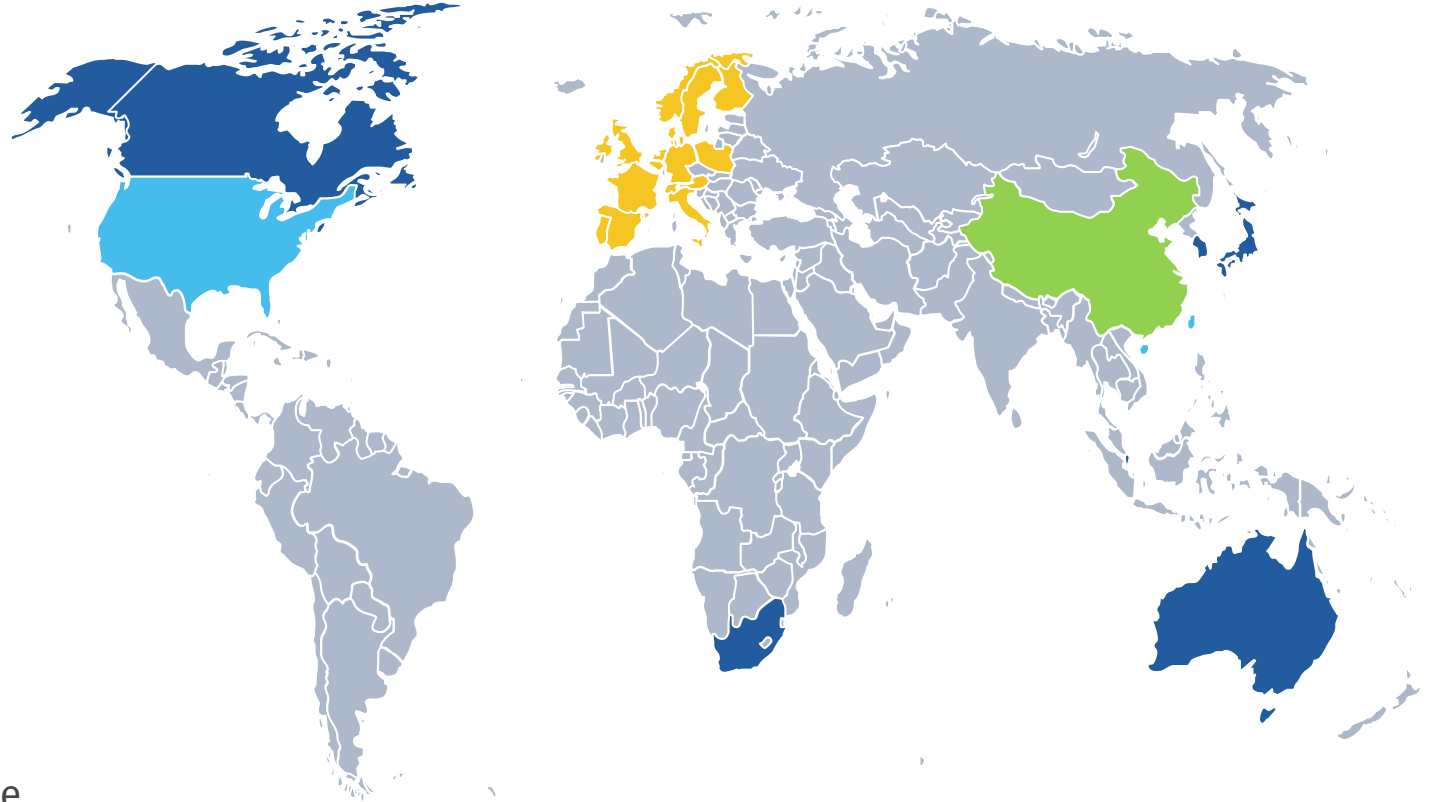
**Globe
Scan** 

**Globe
Scan** 



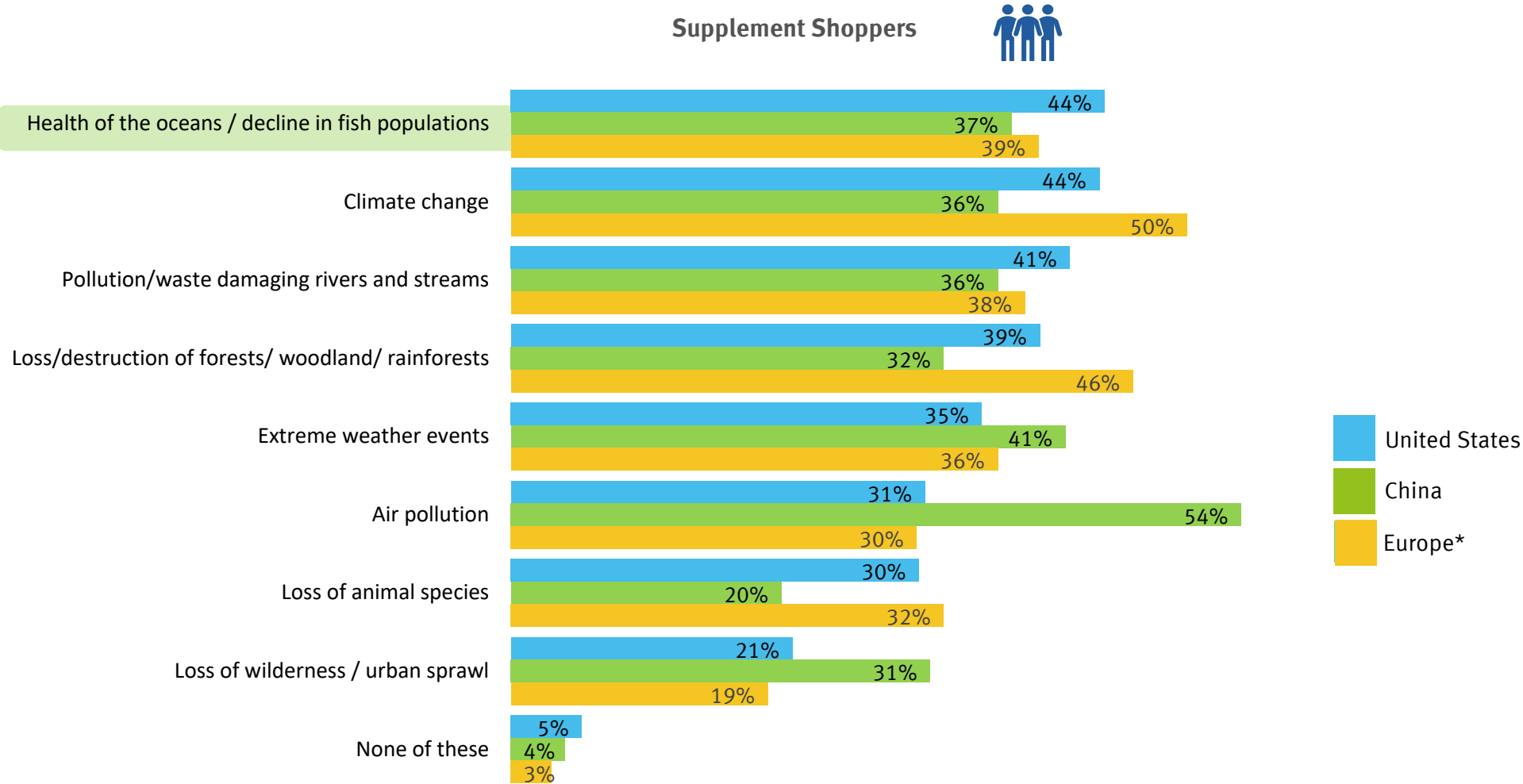
2024 GlobeScan Consumer Research: Introduction

- **MSC commissions the largest global survey of seafood consumers every 2 years.**
- **27,000+ consumers surveyed in 23 markets globally. General public sample size by country/region:**
 - **US: n = 3,726 (472 supplement shoppers)**
 - **China: n = 2,631 (378 supplement shoppers)**
 - **Europe*: n = 14,518 (1,396 supplement shoppers)**
- **The survey covers:**
 - Attitudes about sustainability and ocean health
 - Changes in dietary habits and healthy eating
 - Perceptions of ecolabels and certification
 - Motivators of seafood purchase
 - MSC awareness, trust, and impact on purchase
- **The 2024 study was in field between January and March.**



*Europe group comprised of Germany, UK, France, Netherlands, Sweden, Denmark, Belgium, Poland, Switzerland, Spain, Finland, Norway, Italy, Austria and Portugal

Most Concerning Environmental Threats

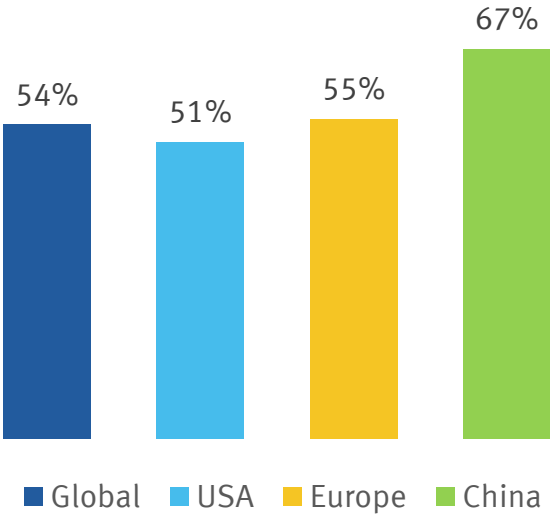


Reasons for Diet Changes

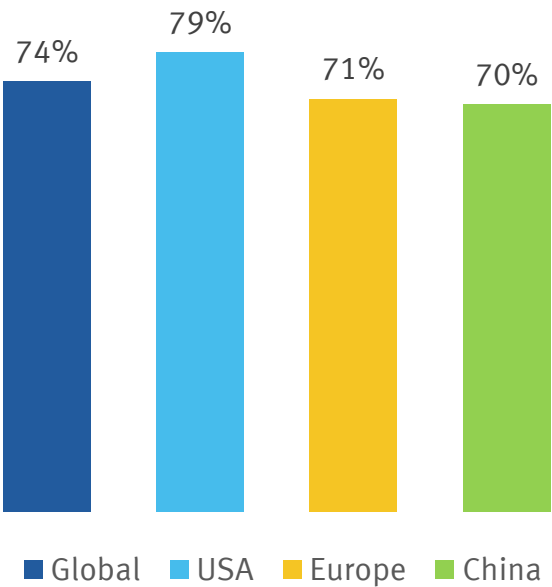
Supplements shoppers



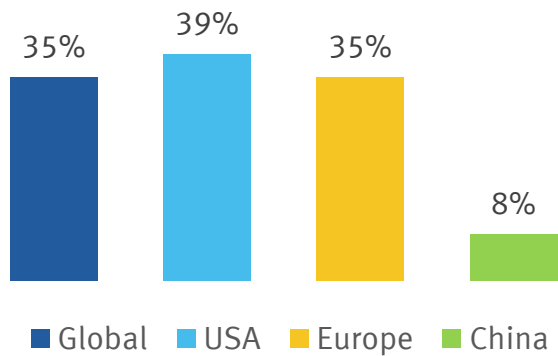
Less impact on the environment



To be healthier



To save money



*Europe group comprised of Germany, UK, France, Netherlands, Sweden, Denmark, Belgium, Poland, Switzerland, Spain, Finland, Norway, Italy, Austria and Portugal

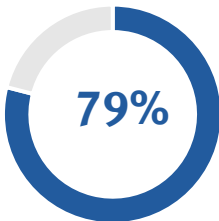
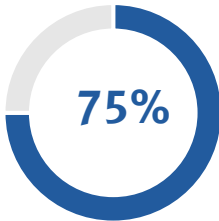
Attitudes toward sales of products

“Agree,” top two (3+4 on a 4-pt scale)

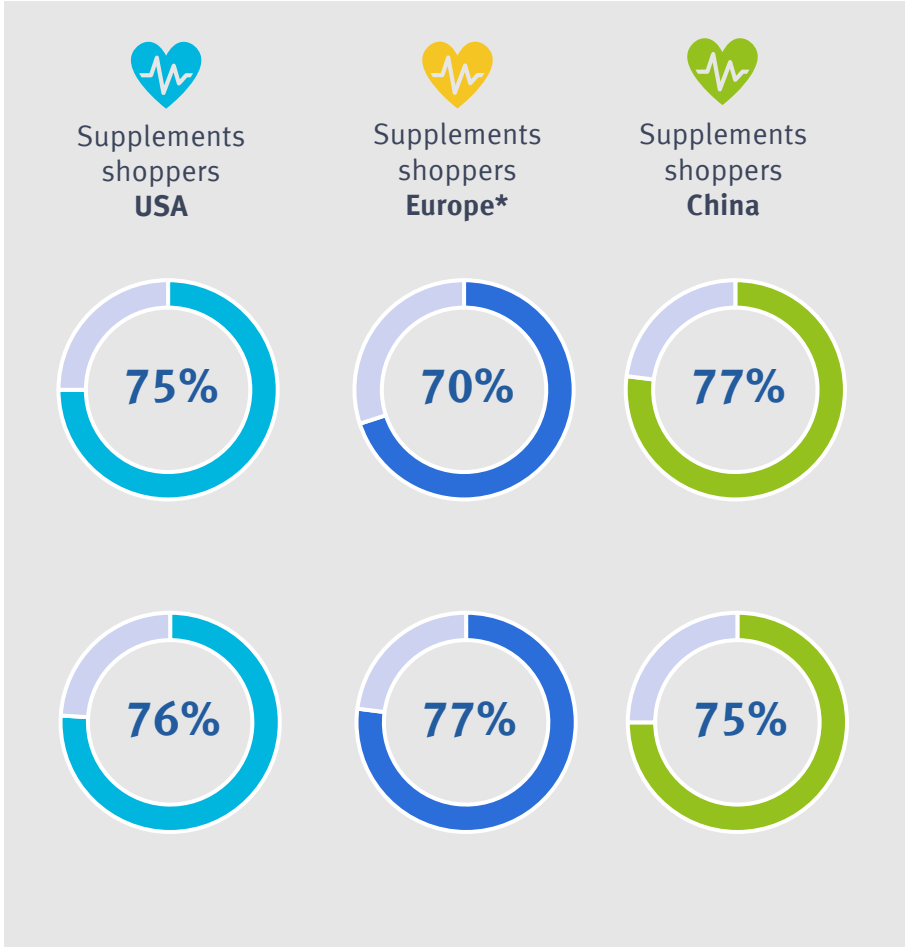
I would like to hear more from companies about the sustainability of their seafood/fish products

Retailers’ and brands’ claims about sustainability and the environment need to be clearly labeled and third-party verified

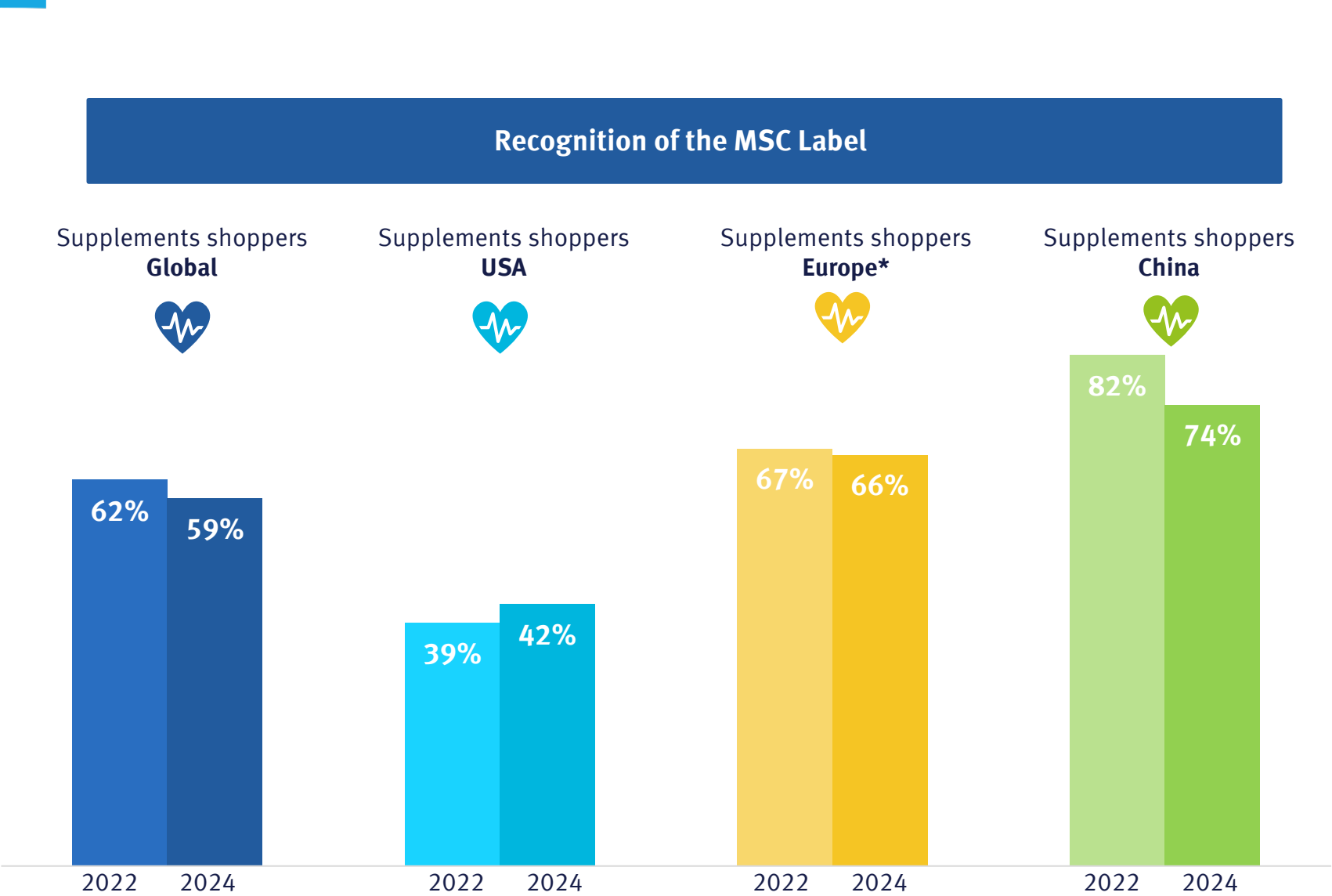
Supplements shoppers
Global



Health Supplements Shoppers



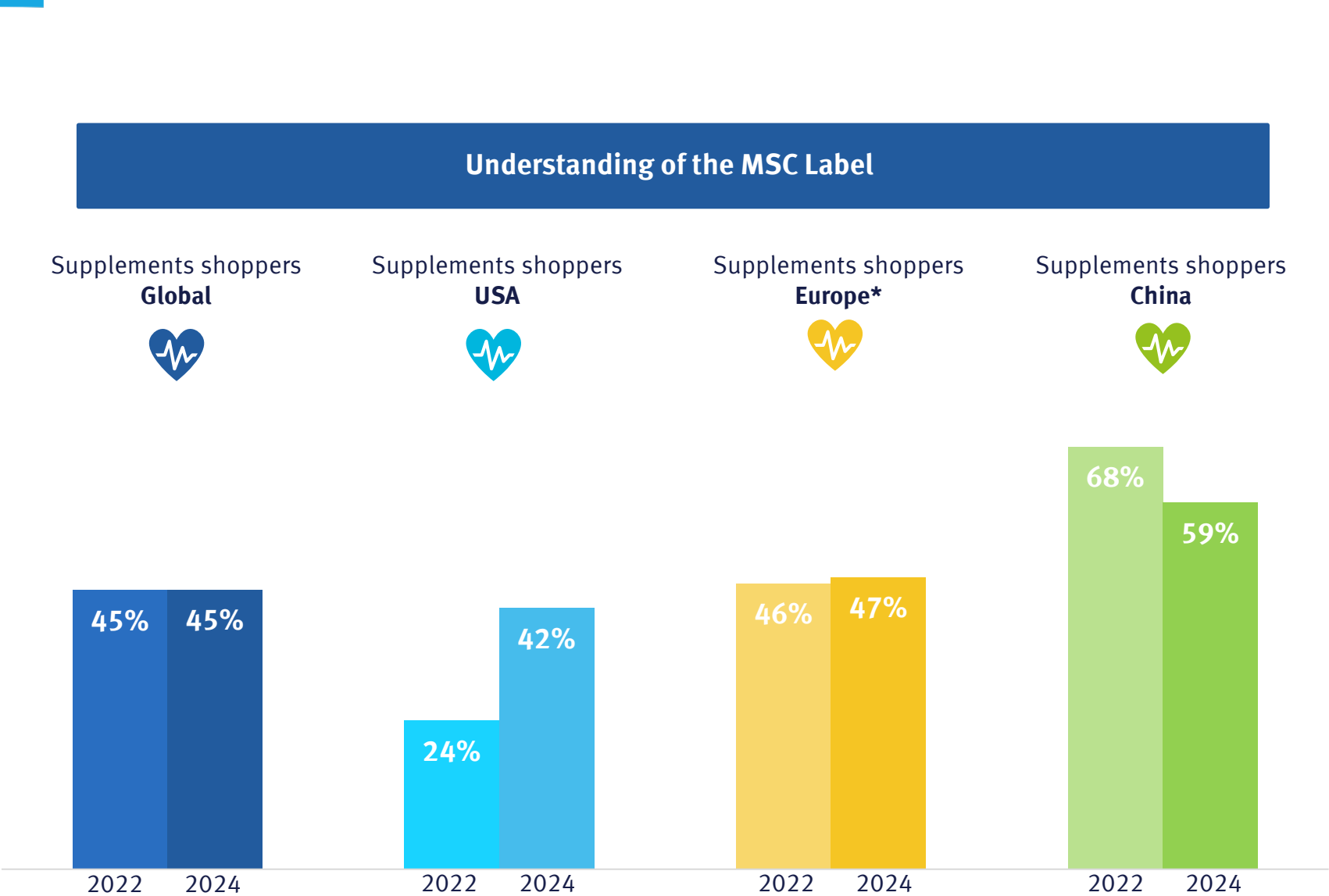
MSC Awareness



50% of seafood consumers are aware (global)

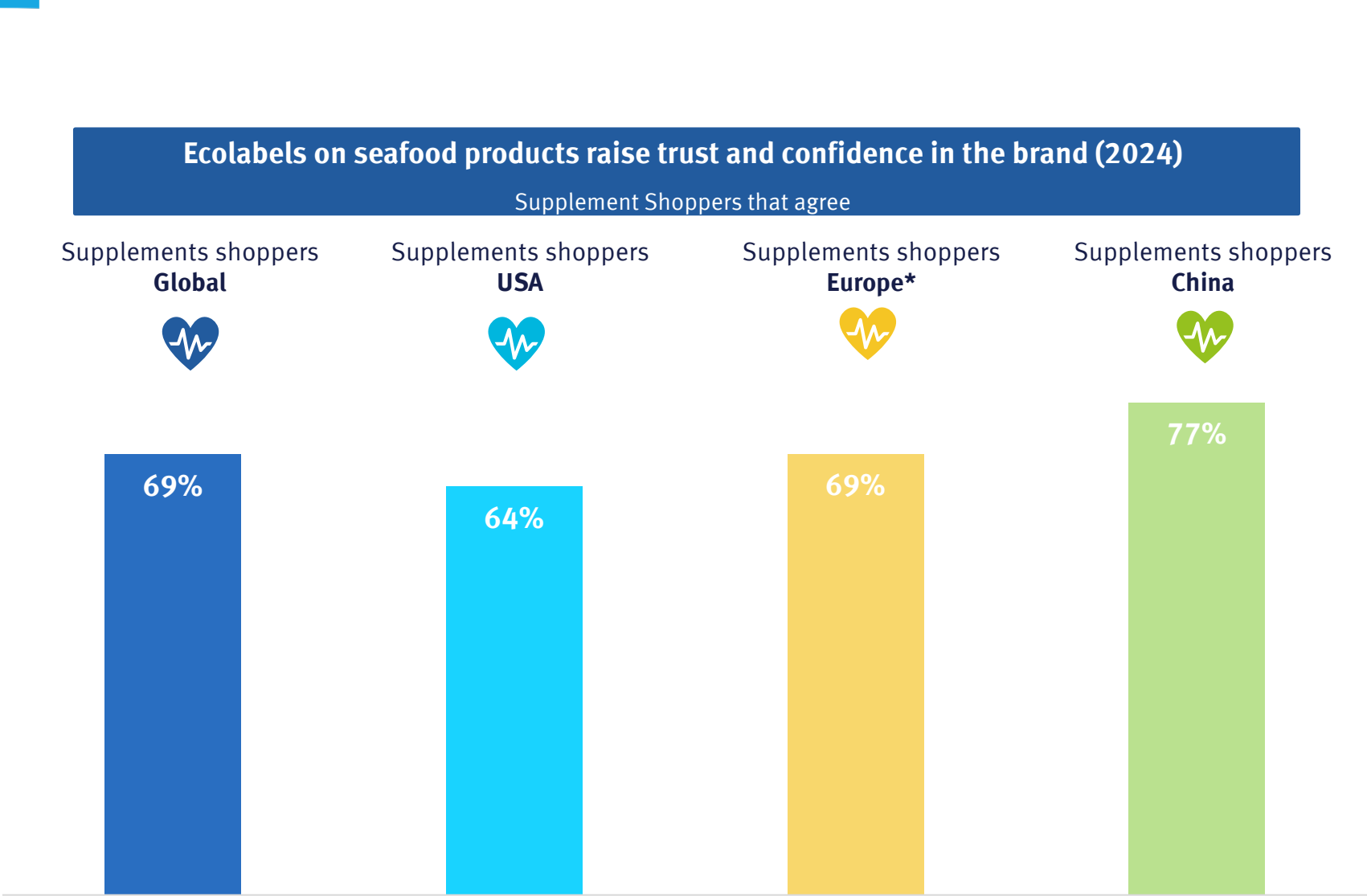
*Europe group comprised of Germany, UK, France, Netherlands, Sweden, Denmark, Belgium, Poland, Switzerland, Spain, Finland, Norway, Italy, Austria and Portugal

Understanding of the MSC label



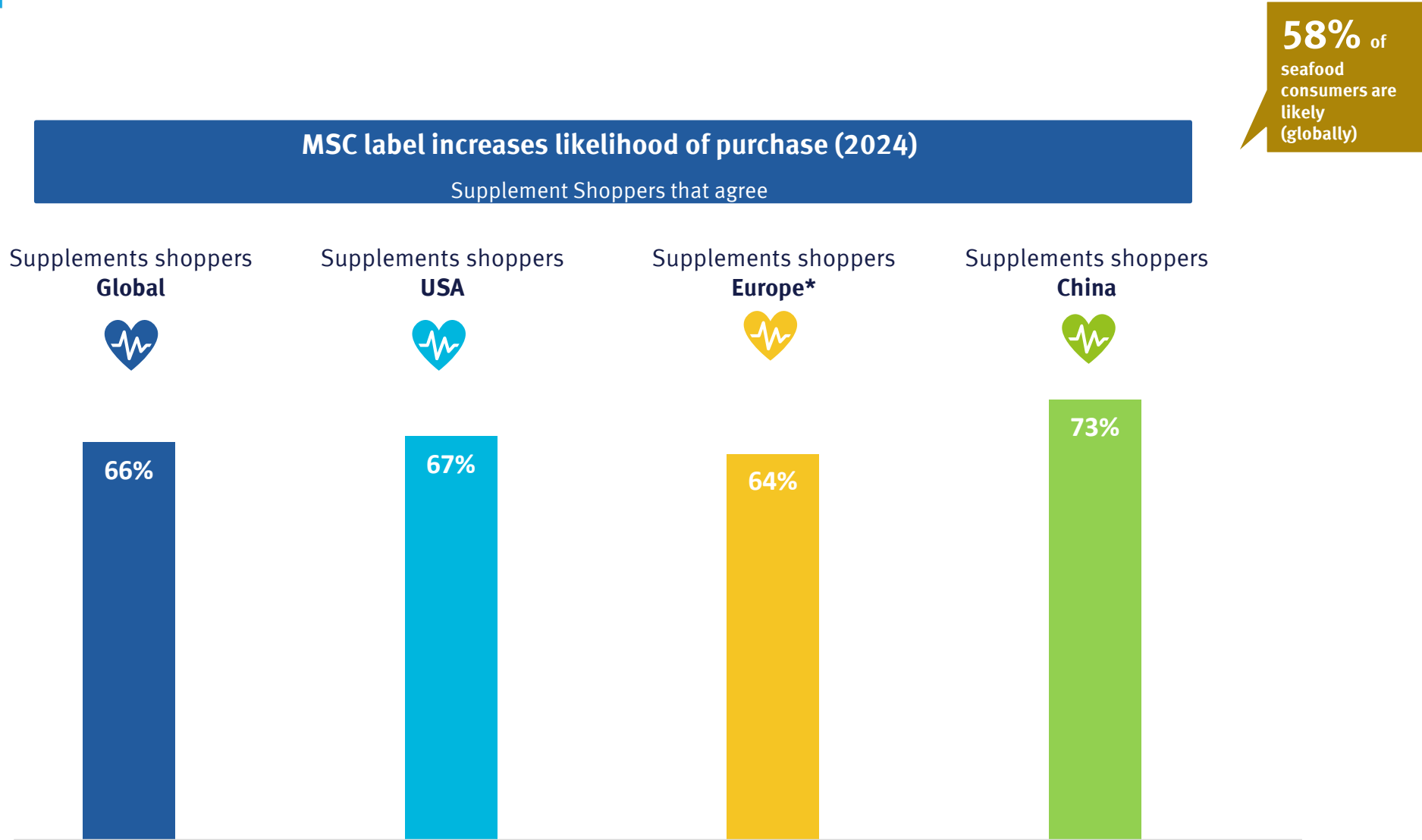
40% of seafood consumers understand (global)

Trust and Confidence



62% of seafood consumers agree (global)

Likelihood to Purchase



Purchase Motivators for Omega-3 Fish & Krill Oils



Hearing Directly from the Consumer



COMMUNICATIONS & MARKETING OPPORTUNITIES

A person is sitting on a sandy beach, wearing denim shorts and flip-flops. They are holding a clear glass filled with ice and water in their right hand. In their left hand, they are holding a single red, oval-shaped pill. The background shows the beach and the person's legs. The entire image has a blue tint.

OUR APPROACH TO CONSUMER ENGAGEMENT

People's lives
& plates

MSC connects
healthy food to
a healthy ocean

To the deep
blue ocean



OUR VALUE PROPOSITION TO THE CONSUMER

The 'Win Win'

Pain point:

Striving to live your values, but feeling like you always have to compromise at the grocery store

Our value proposition:

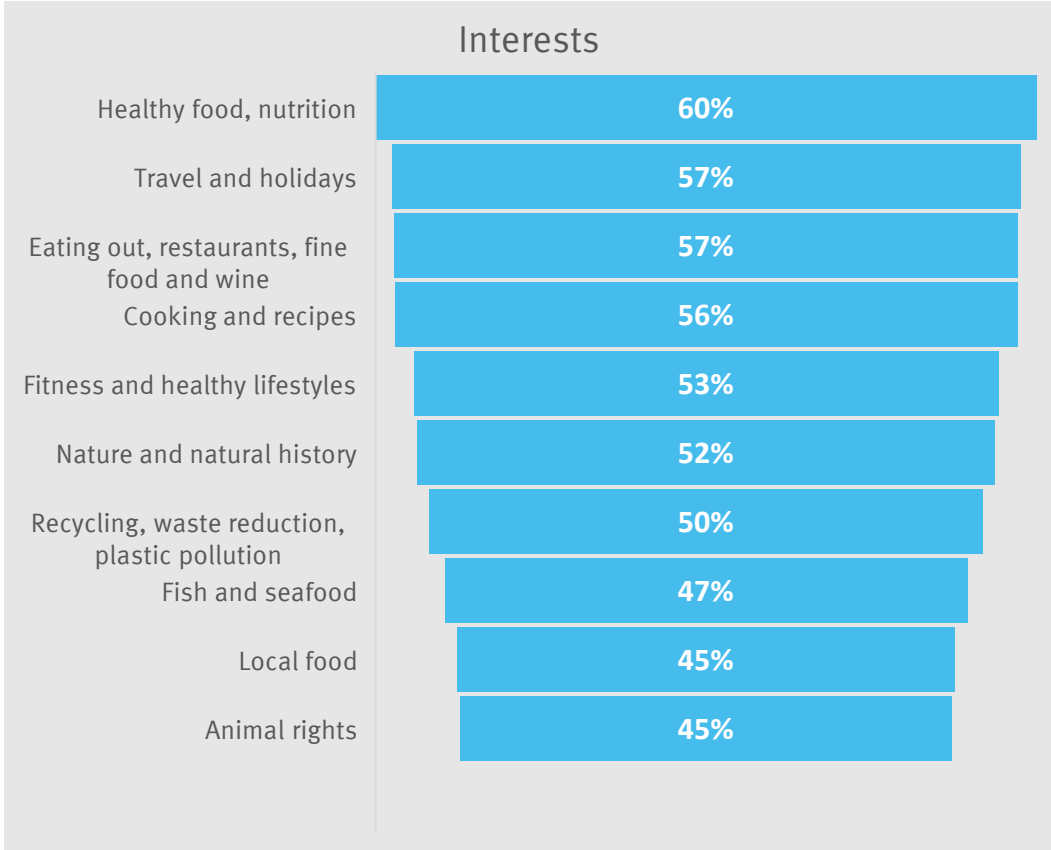
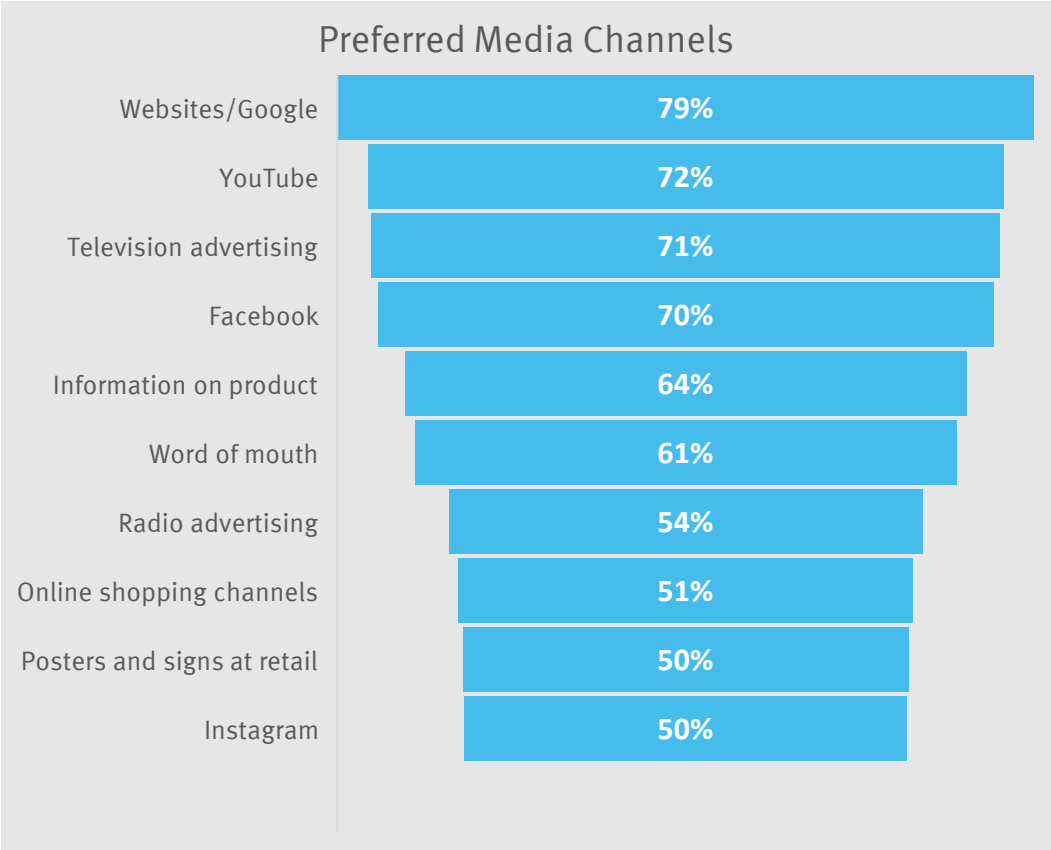
With the MSC you can choose products that are Good For You and the Ocean Too.

Put simply: Feel good.



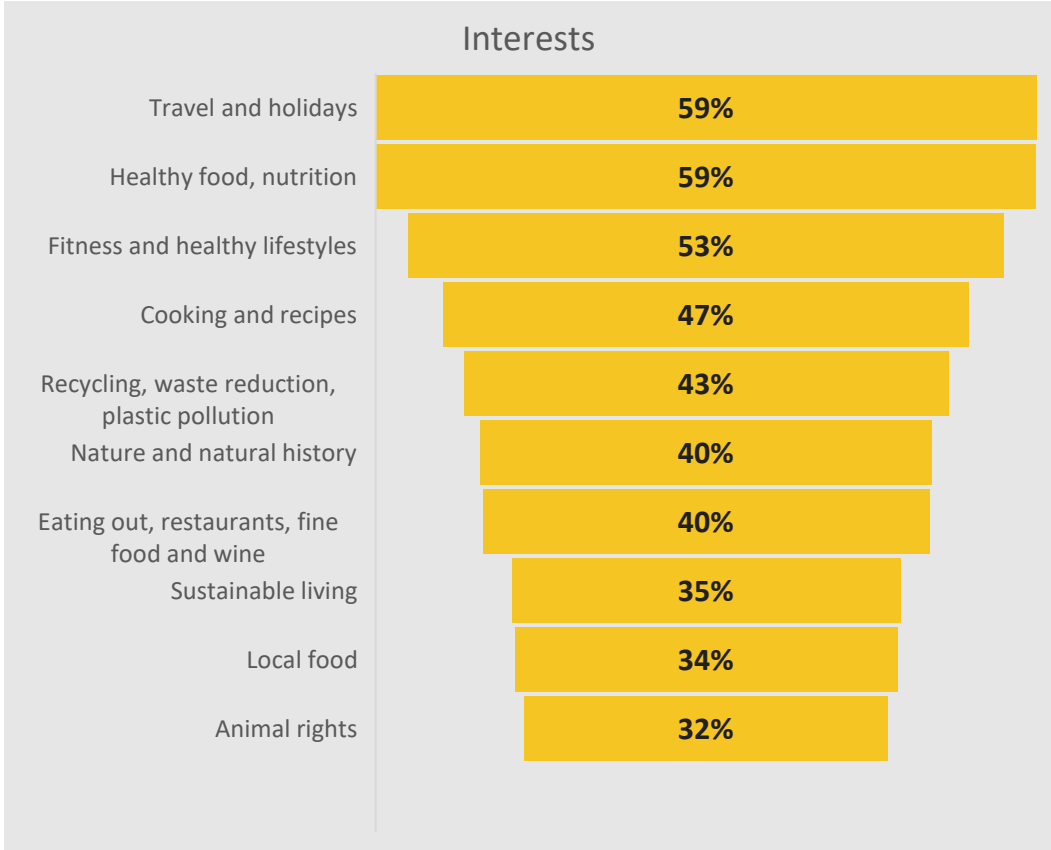
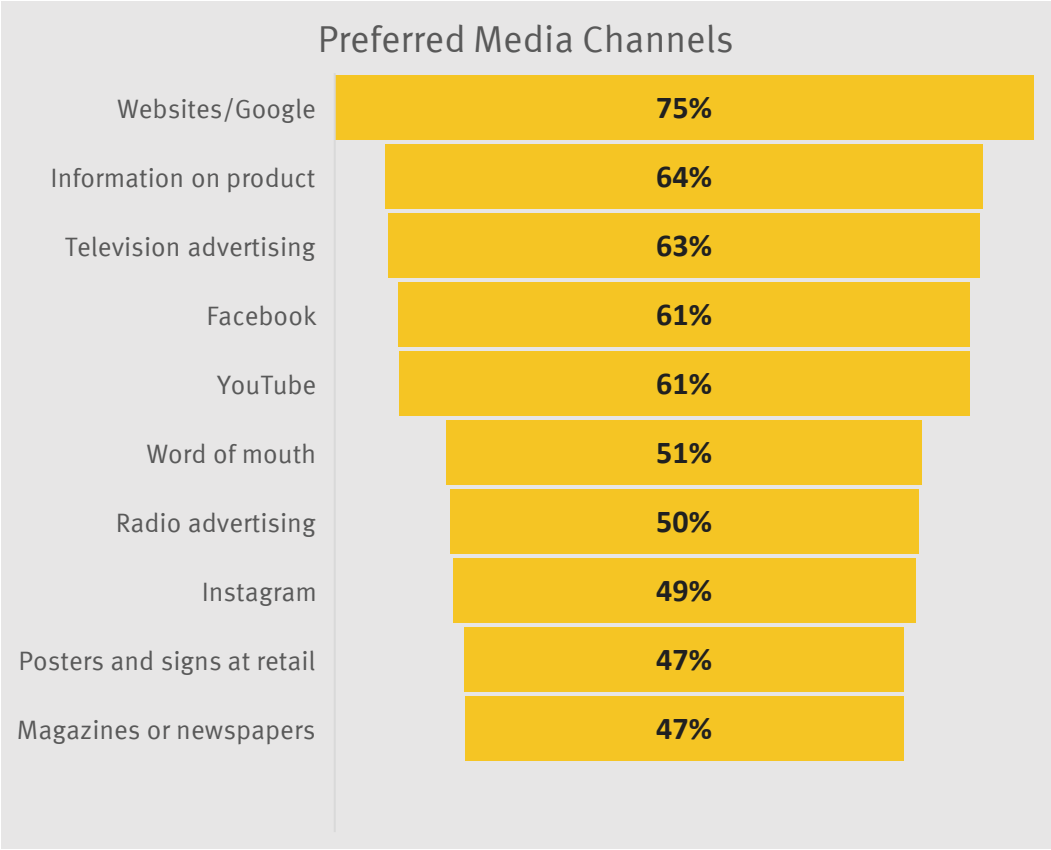
Targeting Supplement Shoppers

Supplementshoppers USA



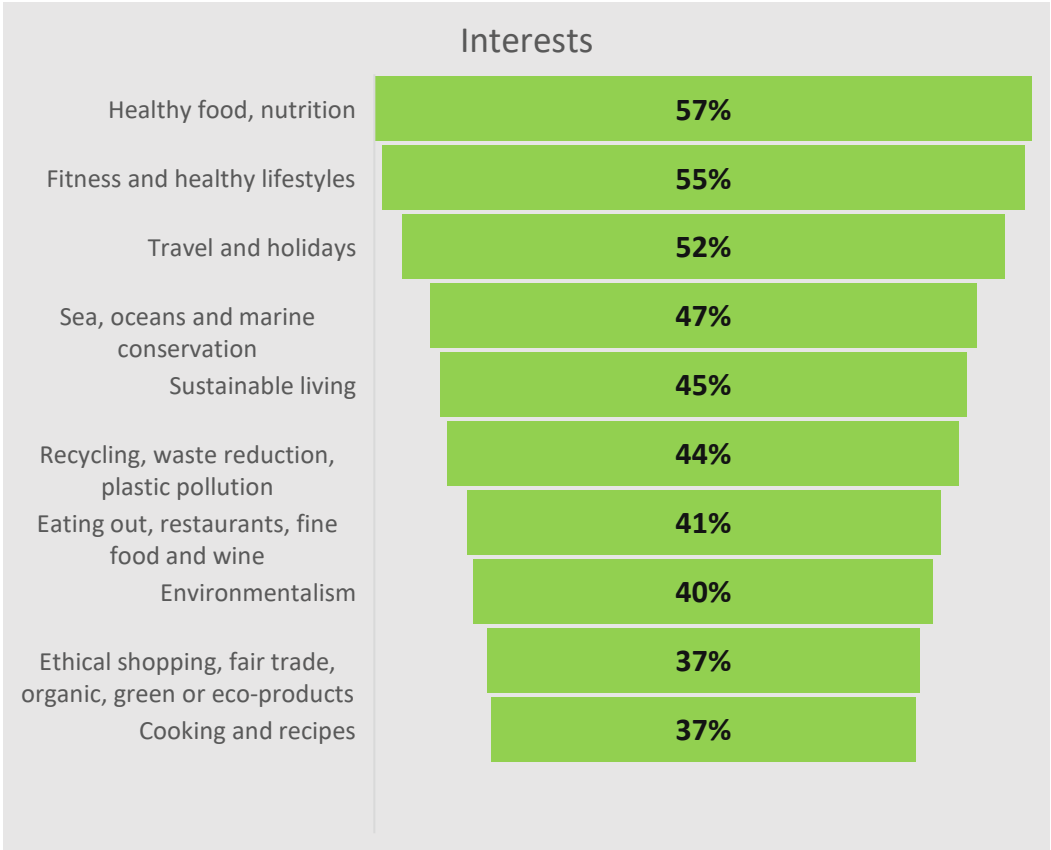
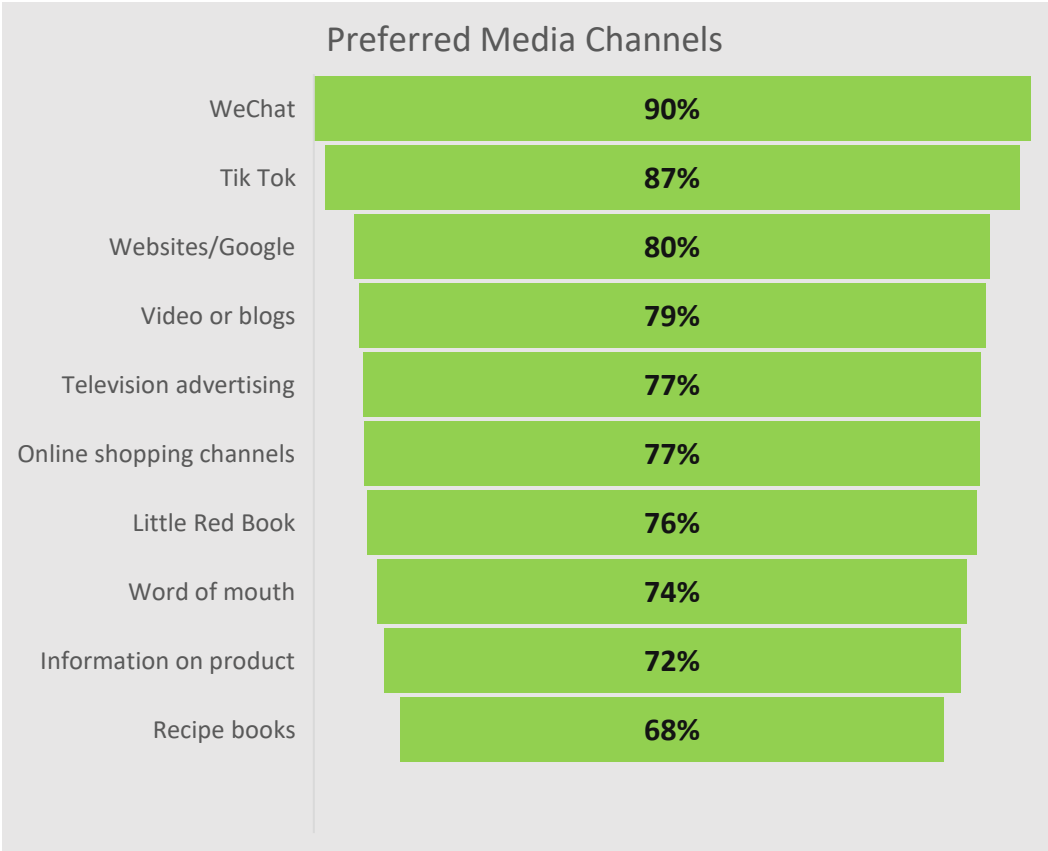
Targeting Supplement Shoppers

Supplementshoppers Europe*



Targeting Supplement Shoppers

Supplementshoppers China



Earth Month (April 2025)

- A great opportunity to show your customers you care about the planet
- Campaign designs for partners
- Easily request custom assets
- Social media videos
- In-store talkers, wobblers, aisle blades



Supplement Partner Toolkit

- Customizable social media templates
- Long and short form language templates
- Photography and videography from fisheries
- Lifestyle photography

Replace
with your
own
product



Wild Alaskan Pollock



ISF Norwegian & Icelandic Herring



THANK YOU



For more partner updates, marketing opportunities, and insights:

[Sign up here](#)

For questions, please reach out to:

Camila Flanagan, Marketing Manager, MSC US

Camila.Flanagan@msc.org

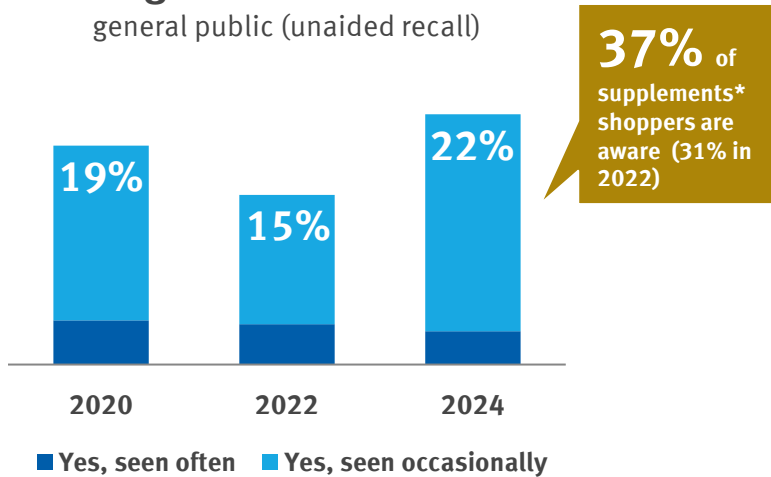
Nicole Kunin, Commercial Manager, MSC US

Nicole.Kunin@msc.org

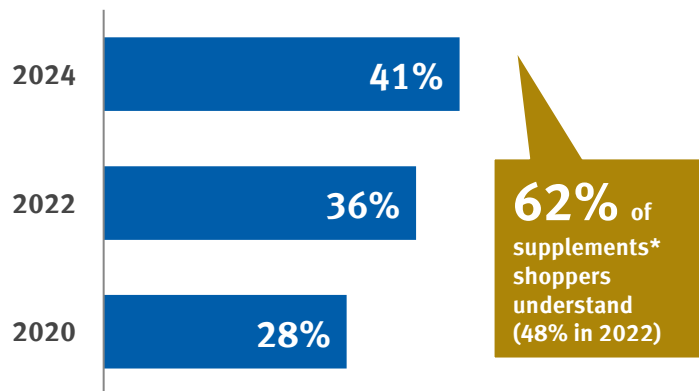


2024 GLOBESCAN RESEARCH: JAPANESE CONSUMER INSIGHTS SUMMARY

Recognition of MSC label general public (unaided recall)



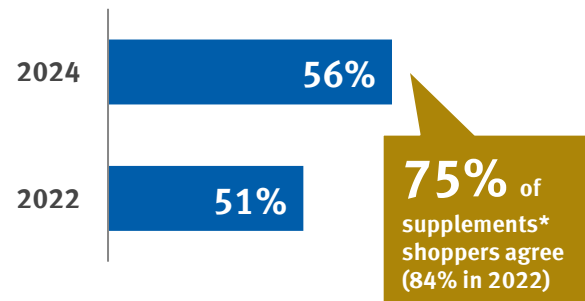
Understanding of MSC label Among seafood consumers** (free text answers)



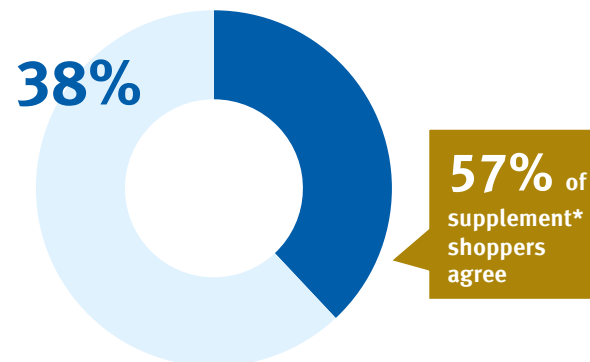
*Health supplements / fish oil shoppers, n=42 (please note low sample size) -
**Seafood consumers (Japan), n=630



Ecolabels on seafood products raise trust and confidence in the brand Seafood consumers** that agree



MSC label increases likelihood of purchase Seafood consumers** that agree



OVERWHELMING SUPPORT FOR SUSTAINABILITY & OCEAN HEALTH | HEALTH SUPPLEMENTS & FISH OIL SHOPPERS

52% would like to hear more from companies about the sustainability of their seafood/fish products** | **76%** of supplements* shoppers agree

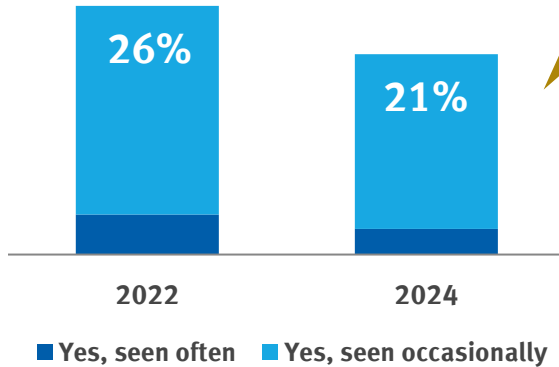
54% demand retailers' and brands' claims about sustainability and the environment be clearly labeled and third-party verified** | **76%** of supplements* shoppers agree



2024 GLOBESCAN RESEARCH: SOUTH KOREAN CONSUMER INSIGHTS SUMMARY*

Recognition of MSC label

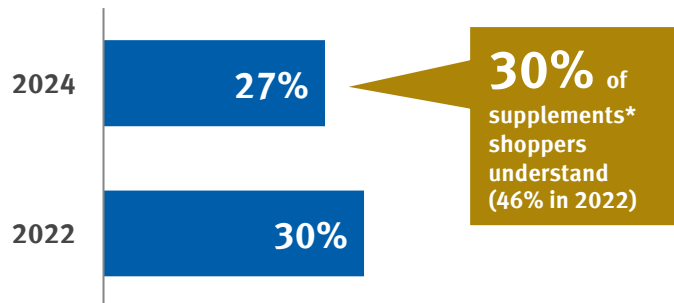
general public (unaided recall)



25% of supplements* shoppers are aware (45% in 2022)

Understanding of MSC label

Among seafood consumers** (free text answers)



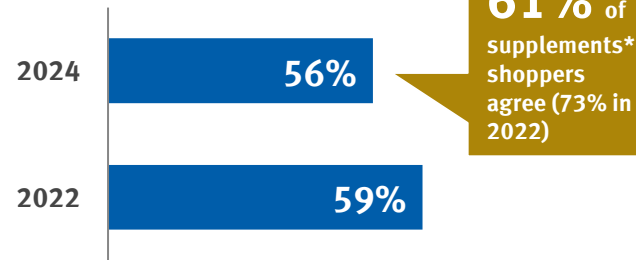
30% of supplements* shoppers understand (46% in 2022)

*Health supplements / fish oil shoppers, n=105
**Seafood consumers (South Korea), n=609



Ecolabels on seafood products raise trust and confidence in the brand

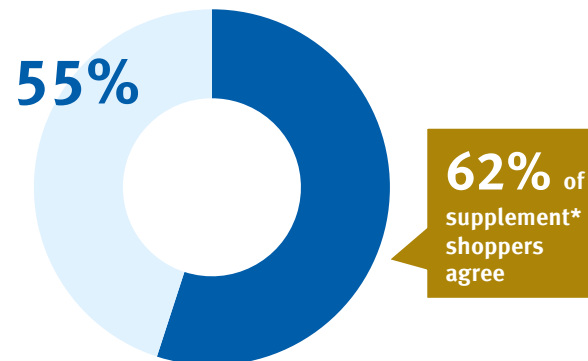
Seafood consumers** that agree



61% of supplements* shoppers agree (73% in 2022)

MSC label increases likelihood of purchase

Seafood consumers** that agree



62% of supplement* shoppers agree

OVERWHELMING SUPPORT FOR SUSTAINABILITY & OCEAN HEALTH | HEALTH SUPPLEMENTS & FISH OIL SHOPPERS

82% would like to hear more from companies about the sustainability of their seafood/fish products** | **90%** of supplements* shoppers agree

82% demand retailers' and brands' claims about sustainability and the environment be clearly labeled and third-party verified** | **91%** of supplements* shoppers agree

Agenda

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- Sustainability — February 19, 2025 | [[Click for your local time](#)]



Thank you for joining us today.