

**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, Carslon 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



The screenshot shows the Omega-3s website with the following content:

**Omega-3s**  
Always a good idea™

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

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**Camila Flanagan**  
Marketing Manager,  
MSC US



**Nicole Kunin**  
Commercial Manager,  
MSC US,

# Agenda

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



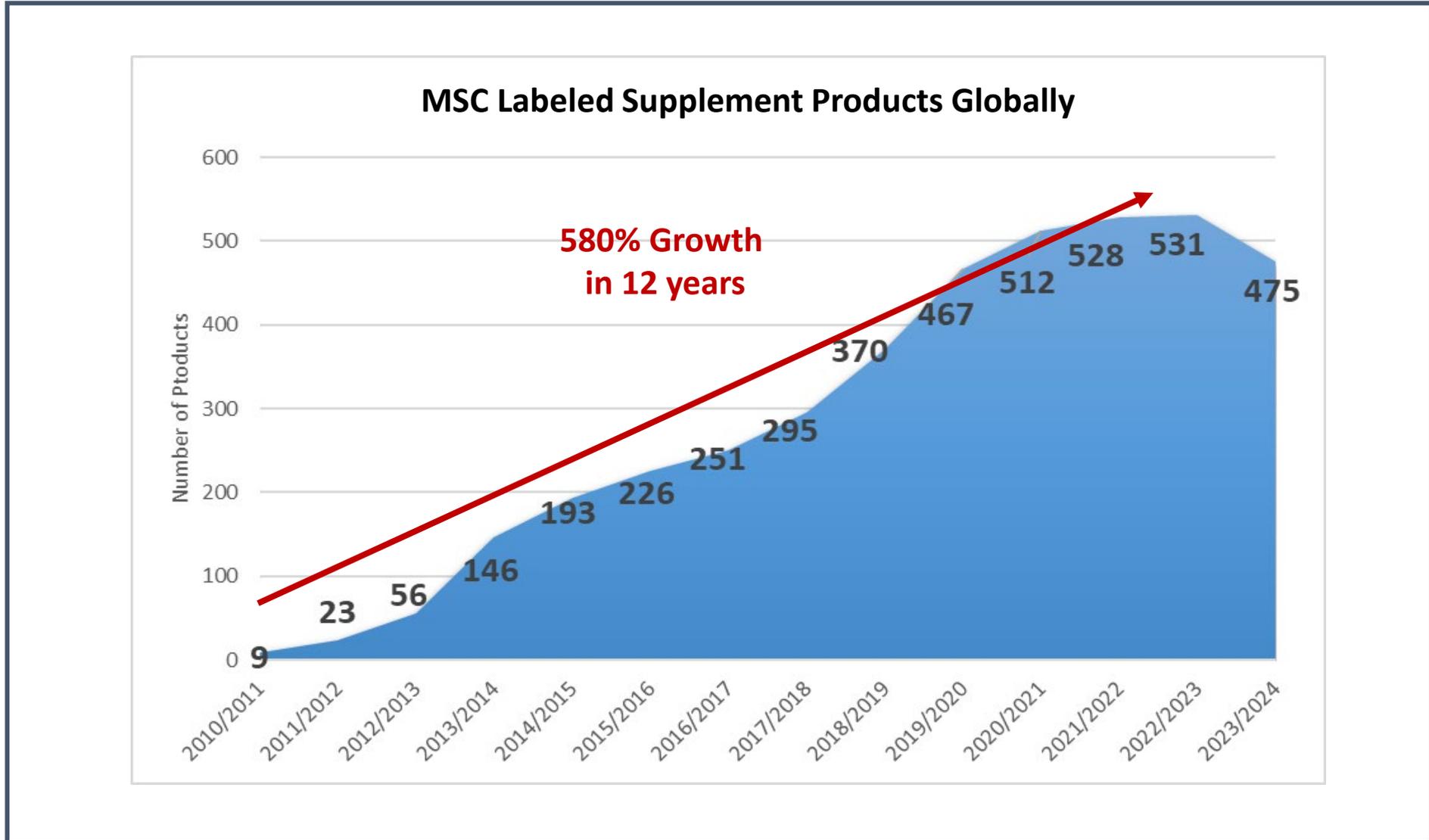
# Global MSC Market Insights – Supplements



# MSC Certified Omega-3 Supplements



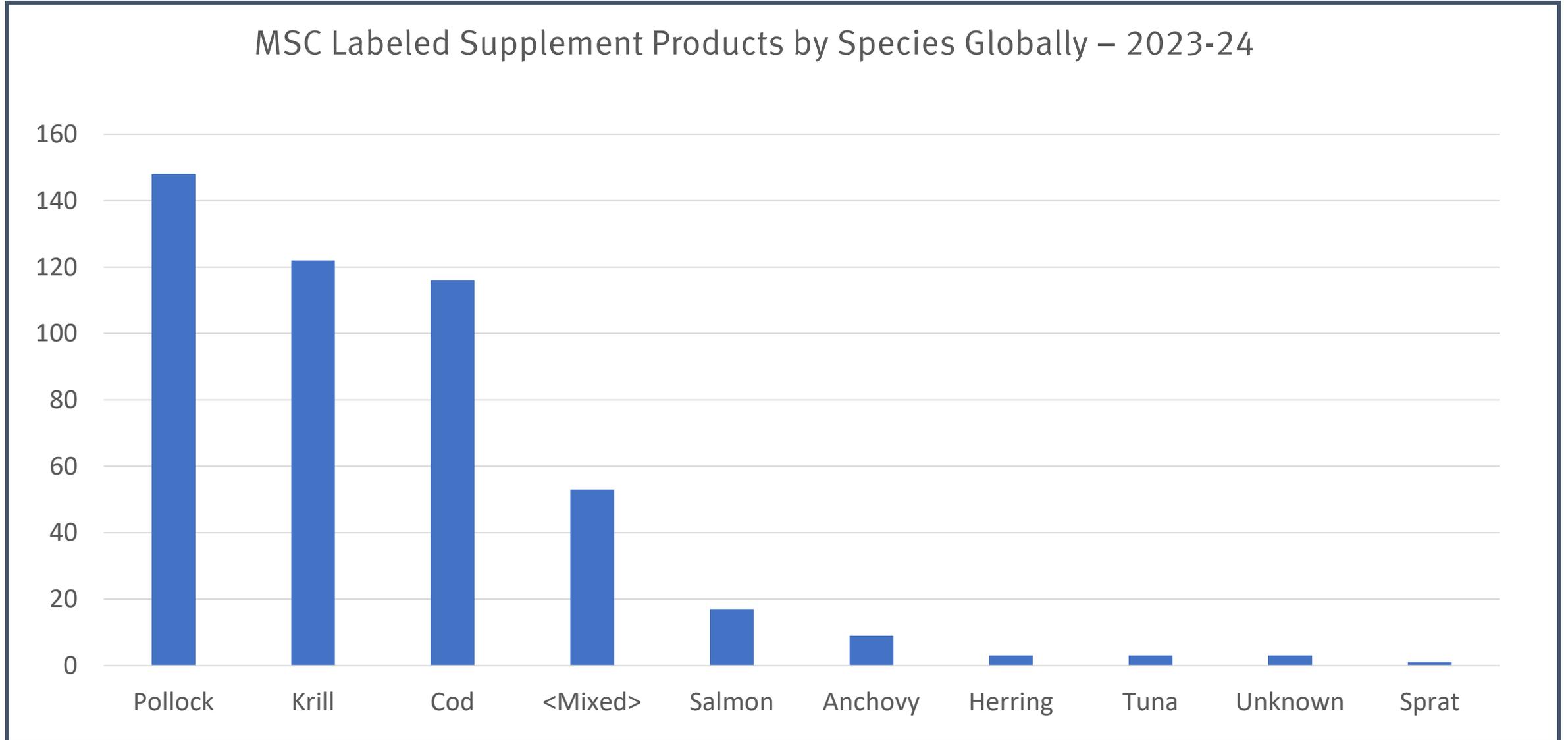
Updated: Jan 21, 2025



# MSC Certified Omega-3 Supplements



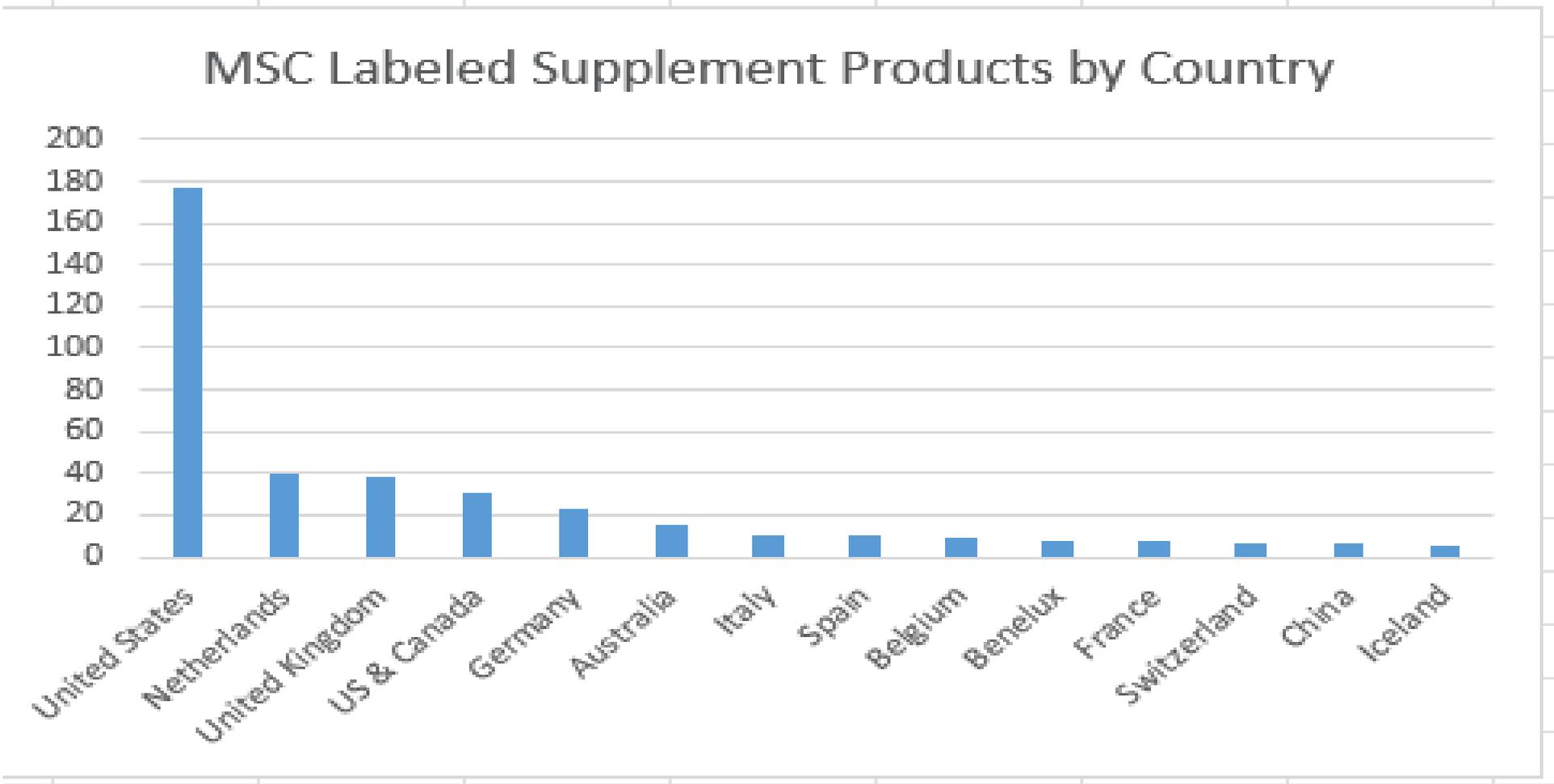
Updated: Jan 21, 2025



# MSC Certified Omega-3 Supplements



Updated: Jan 21, 2025



# MSC Certified Omega-3 Supplements

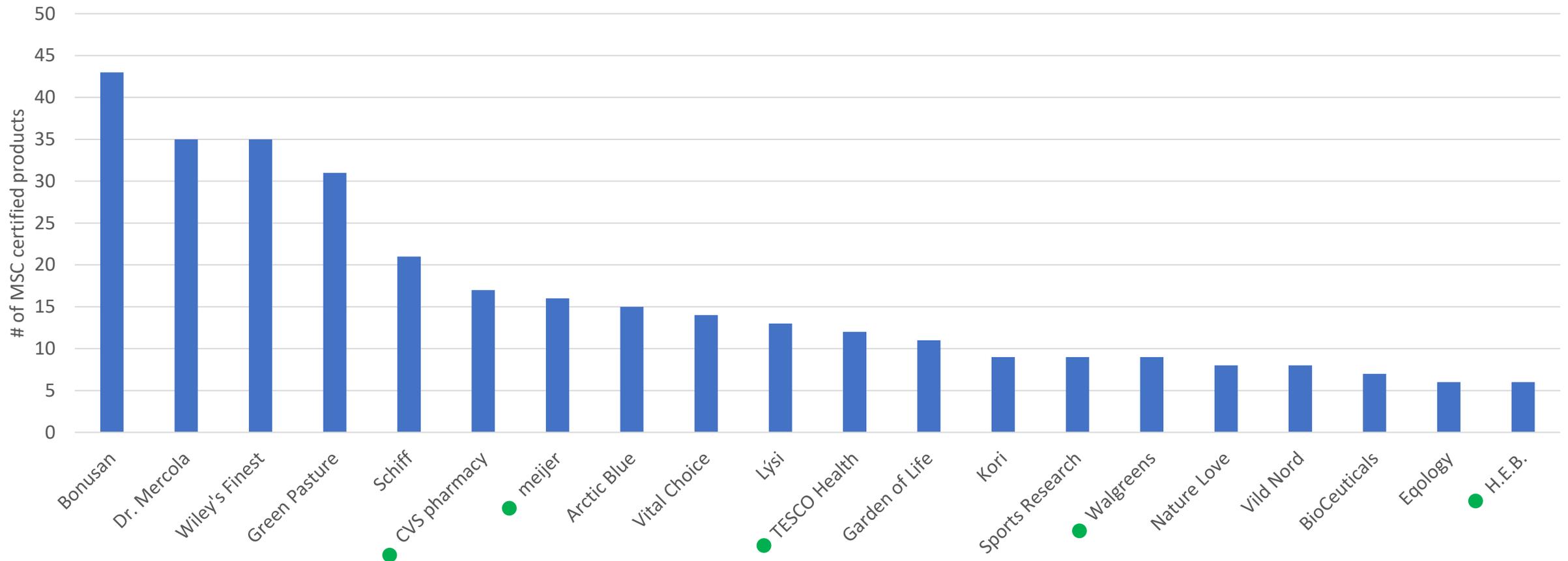


Updated: Jan 21, 2025

## 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

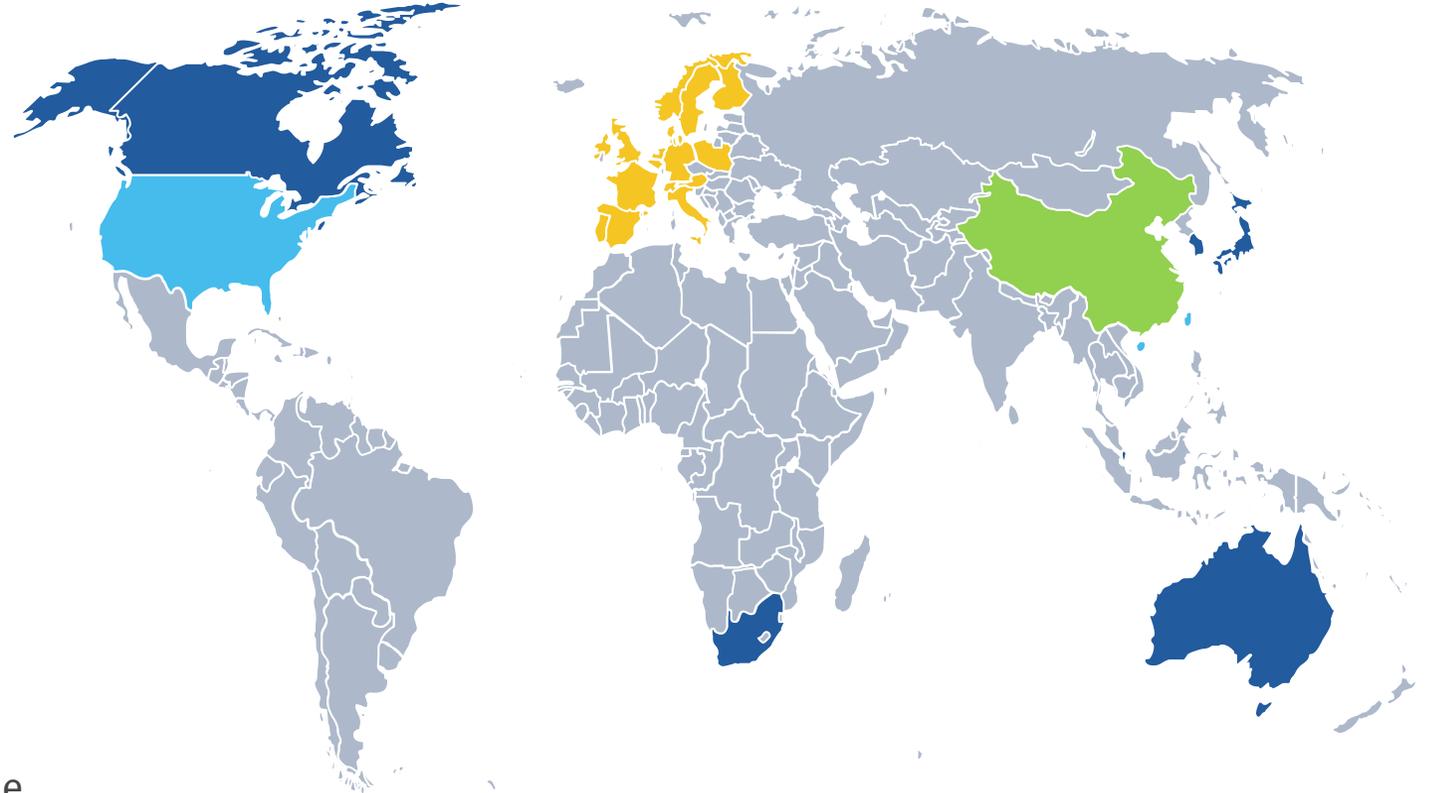
MSC & GlobeScan study of  
seafood consumers - 2024

*Prepared January 2025*



# 2024 GlobeScan Consumer Research: Introduction

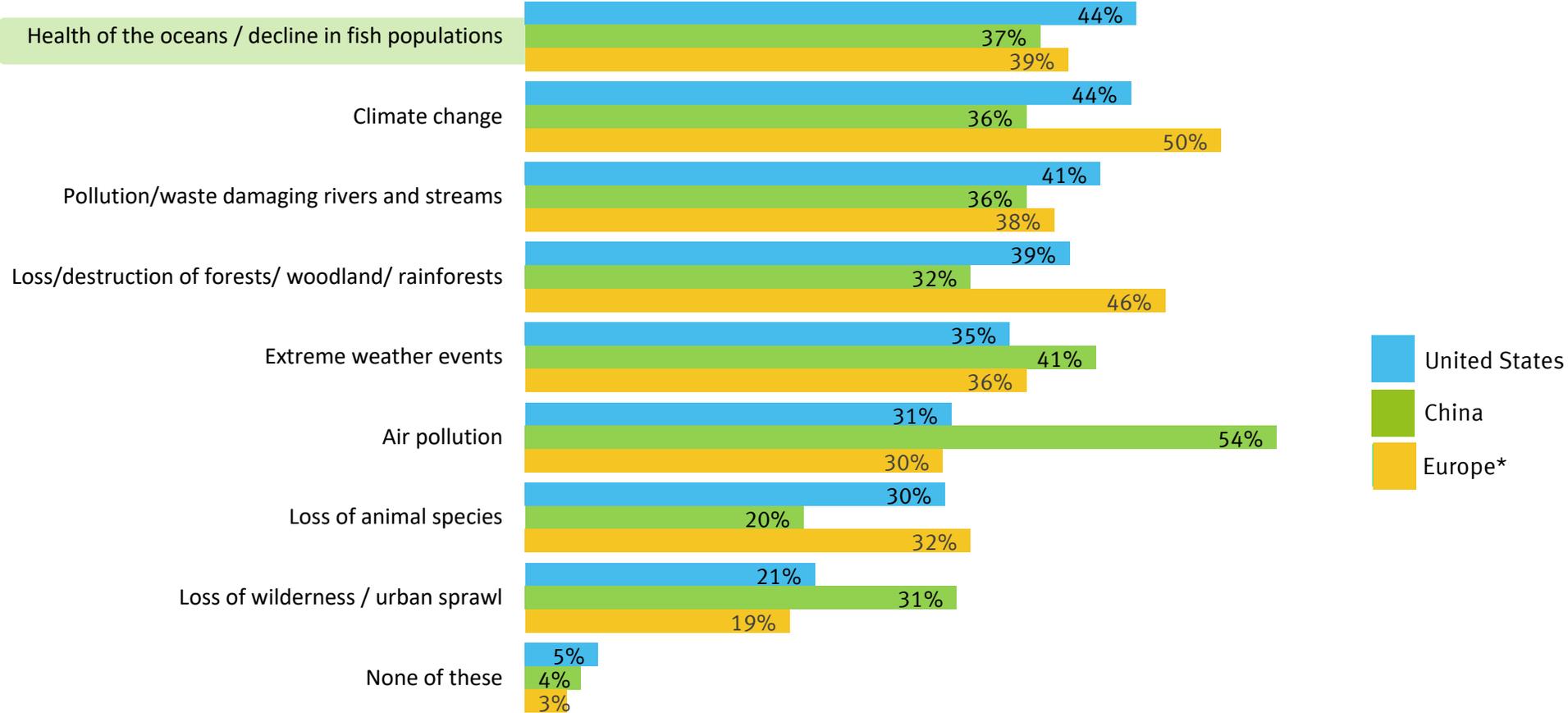
- **MSC commissions the largest global survey of seafood consumers every 2 years.**
- **27,000+ consumers surveyed in 23 markets globally. General public sample size by country/region:**
  - **US: n = 3,726 (472 supplement shoppers)**
  - **China: n = 2,631 (378 supplement shoppers)**
  - **Europe\*: 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

Supplement Shoppers

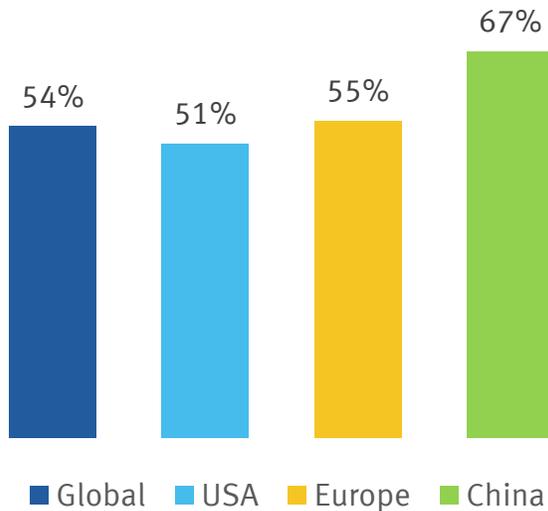


# Reasons for Diet Changes

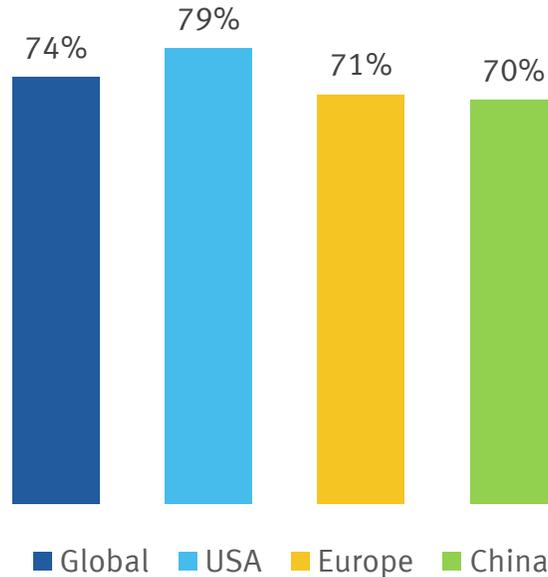
## Supplements shoppers



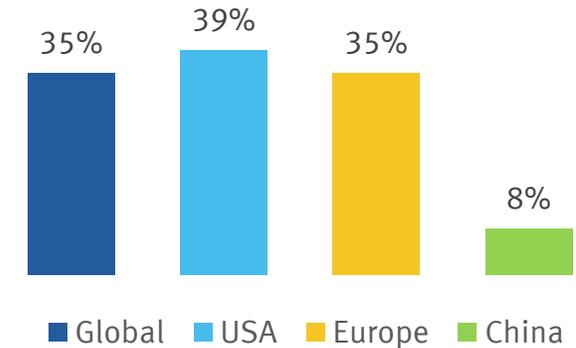
### Less impact on the environment



### To be healthier



### To save money

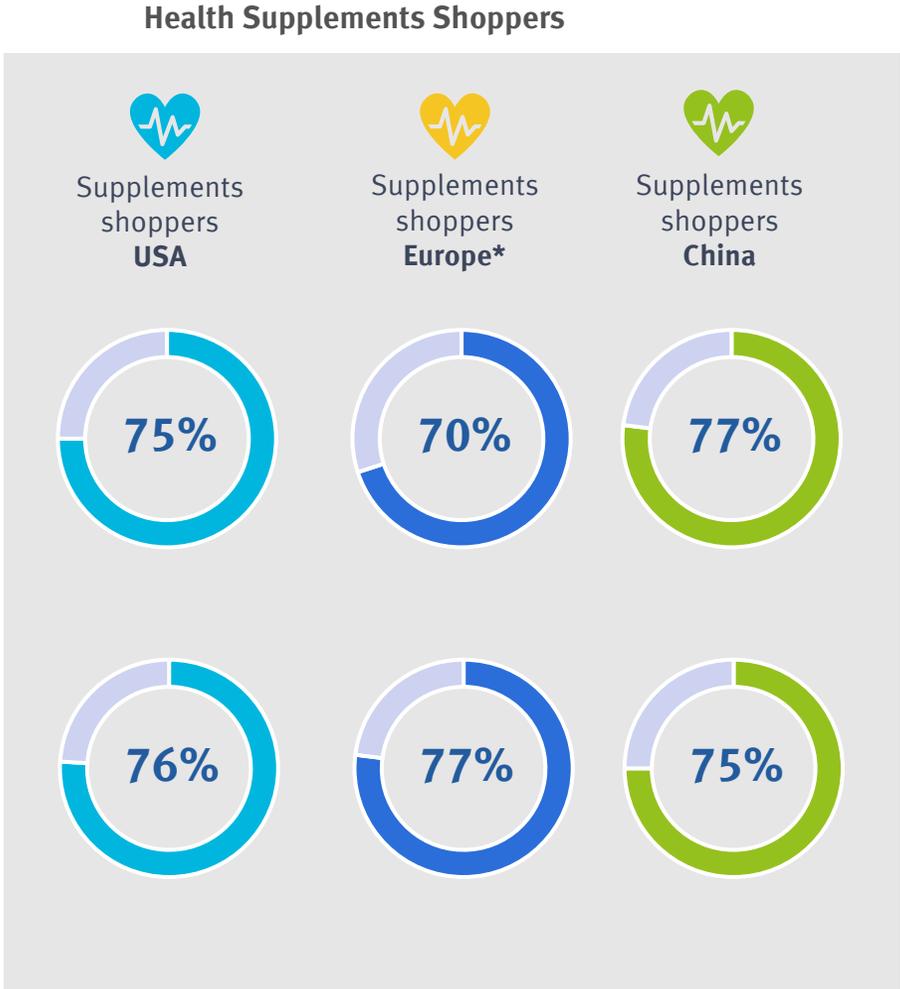
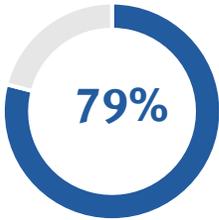


# Attitudes toward sales of products

“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

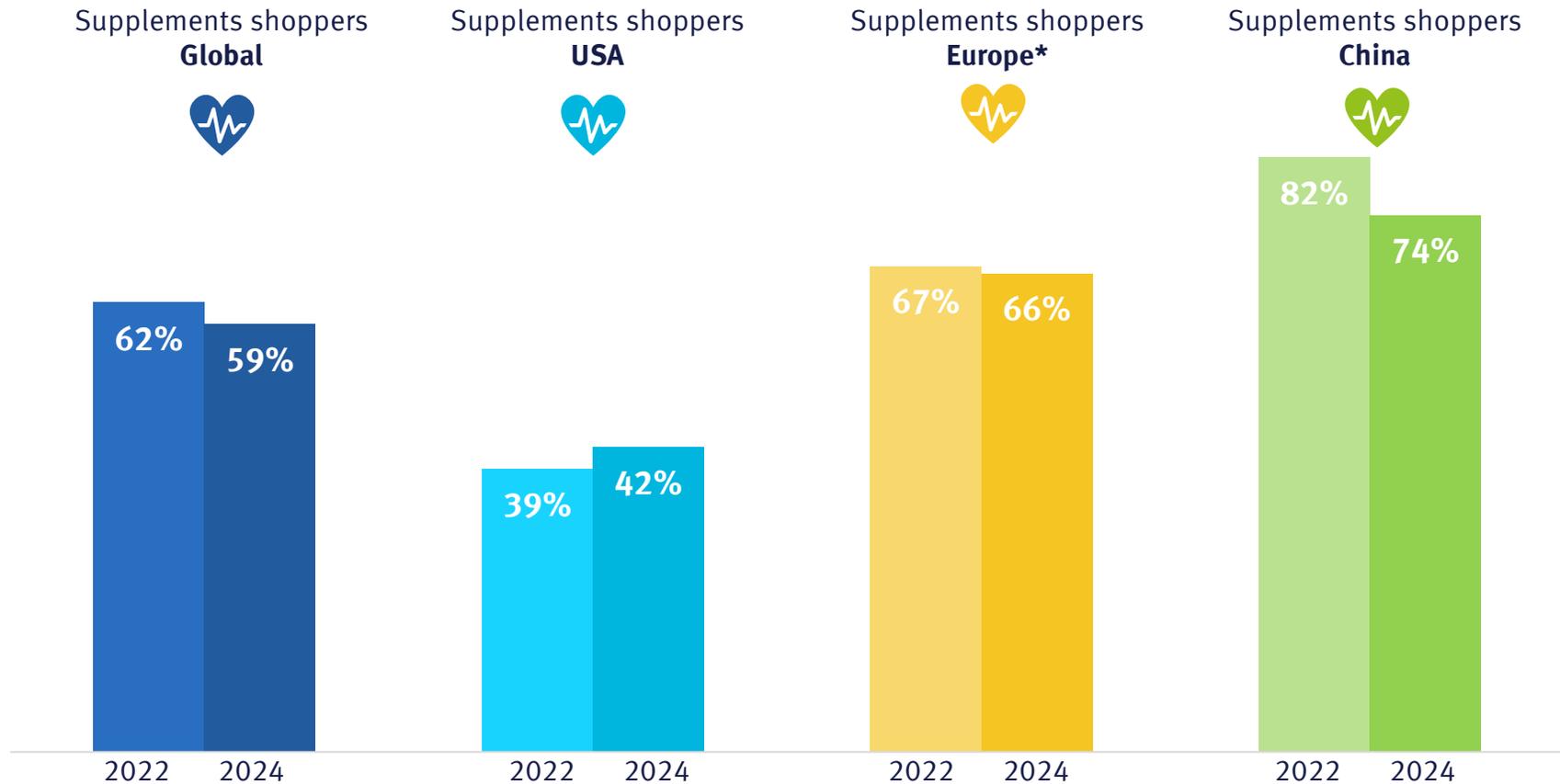
Retailers’ and brands’ claims about sustainability and the environment need to be clearly labeled and third-party verified



# MSC Awareness

50% of seafood consumers are aware (global)

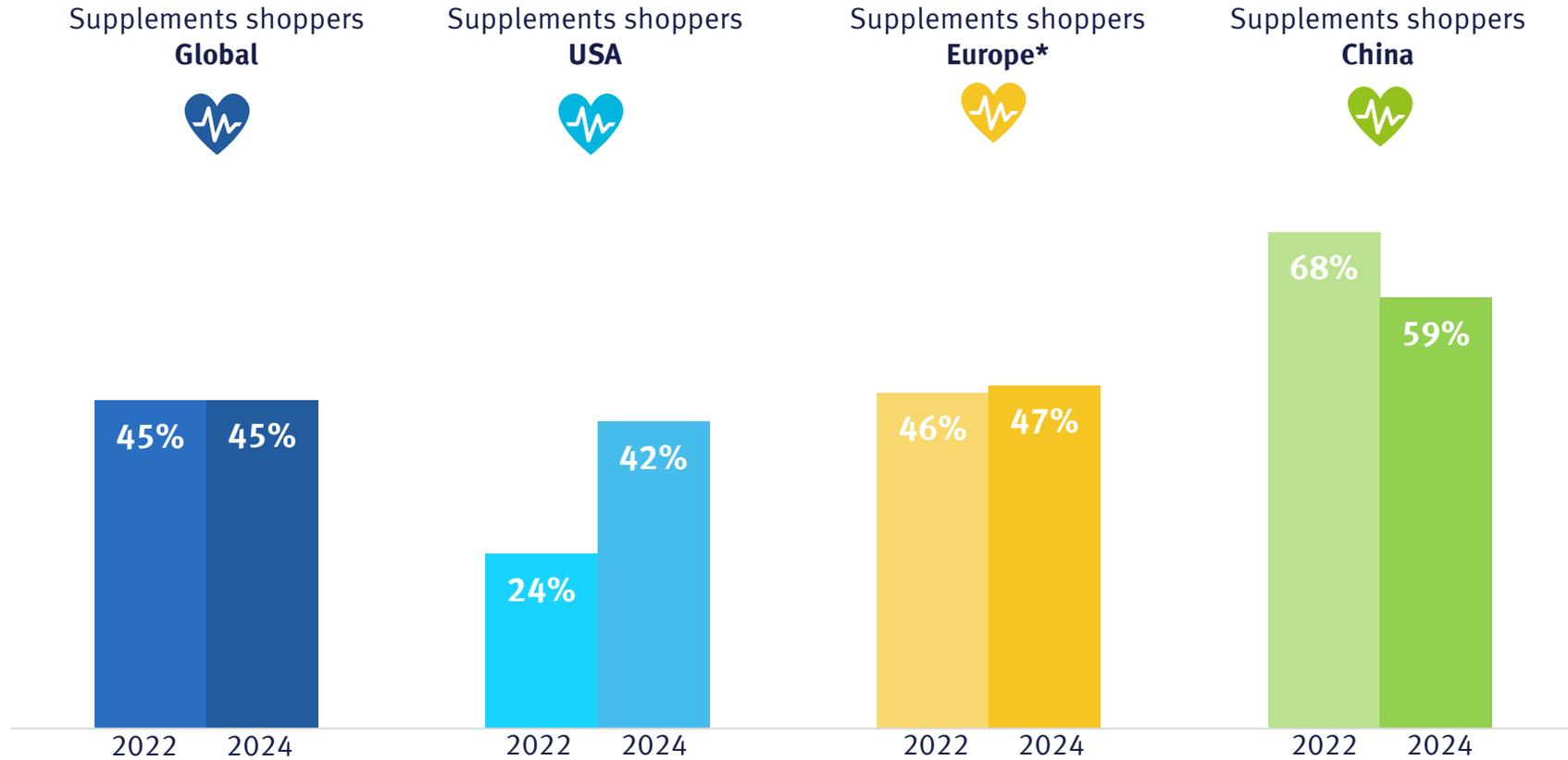
## Recognition of the MSC Label



# Understanding of the MSC label

## Understanding of the MSC Label

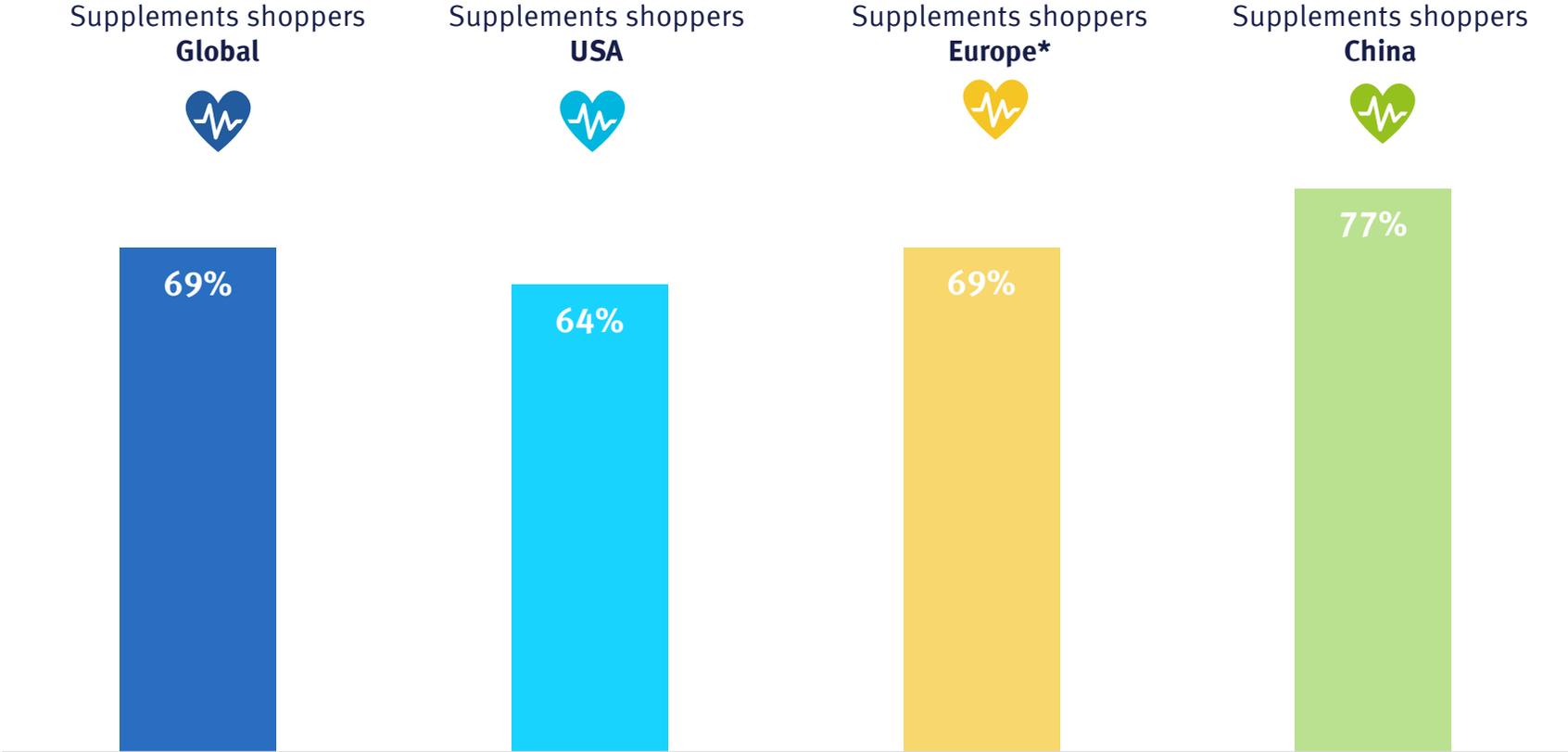
40% of seafood consumers understand (global)



# Trust and Confidence

## Ecolabels on seafood products raise trust and confidence in the brand (2024)

Supplement Shoppers that agree



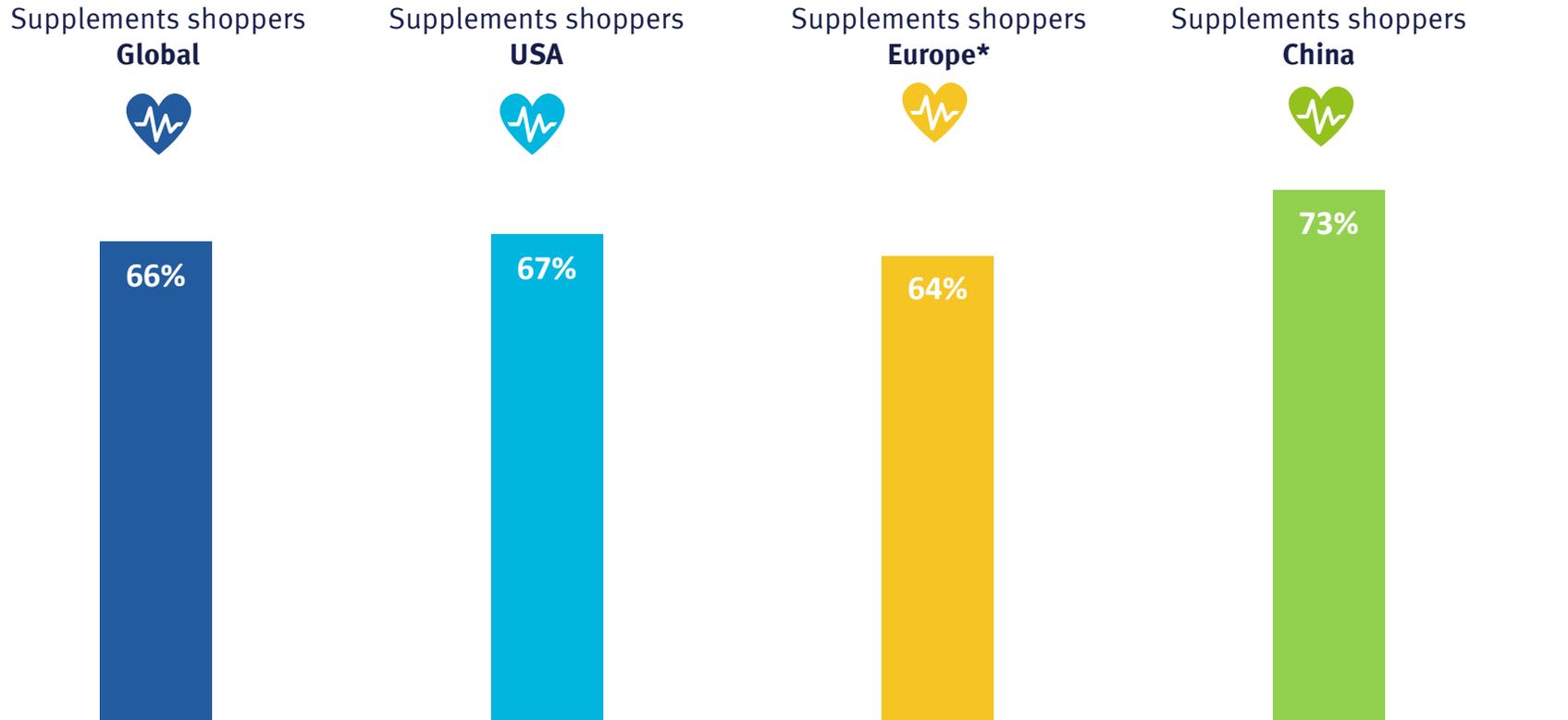
62% of seafood consumers agree (global)

# Likelihood to Purchase

58% of seafood consumers are likely (globally)

## MSC label increases likelihood of purchase (2024)

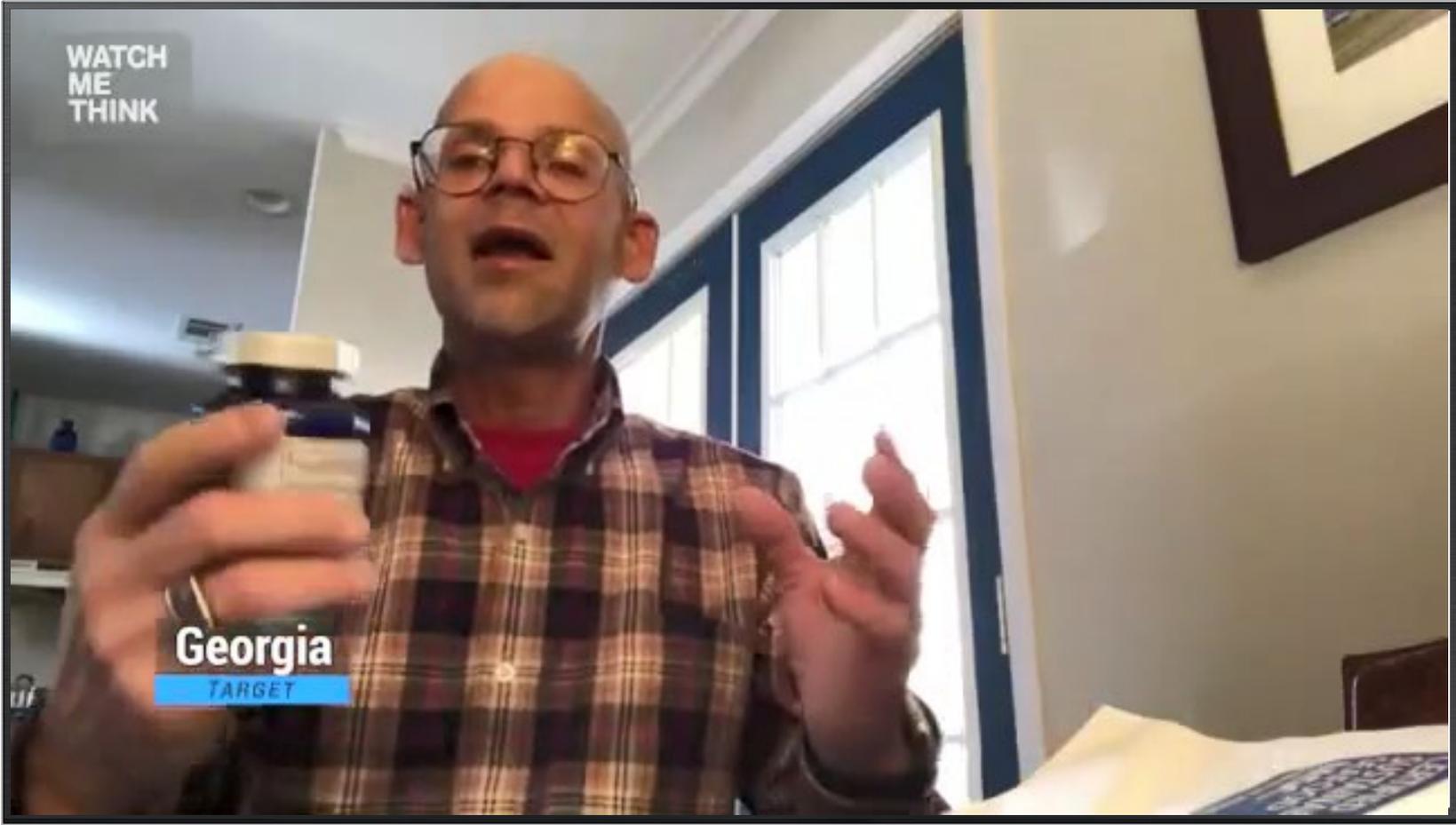
Supplement Shoppers that agree



# Purchase Motivators for Omega-3 Fish & Krill Oils



# Hearing Directly from the Consumer



# COMMUNICATIONS & MARKETING OPPORTUNITIES

# 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:**

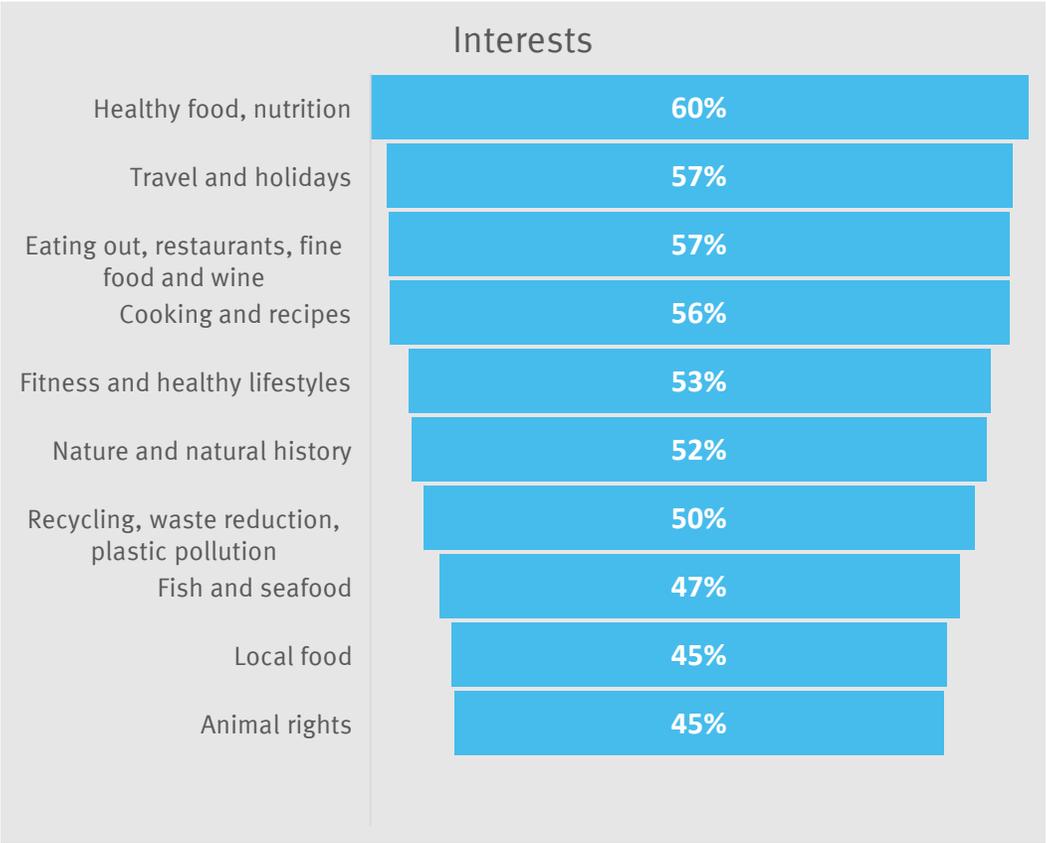
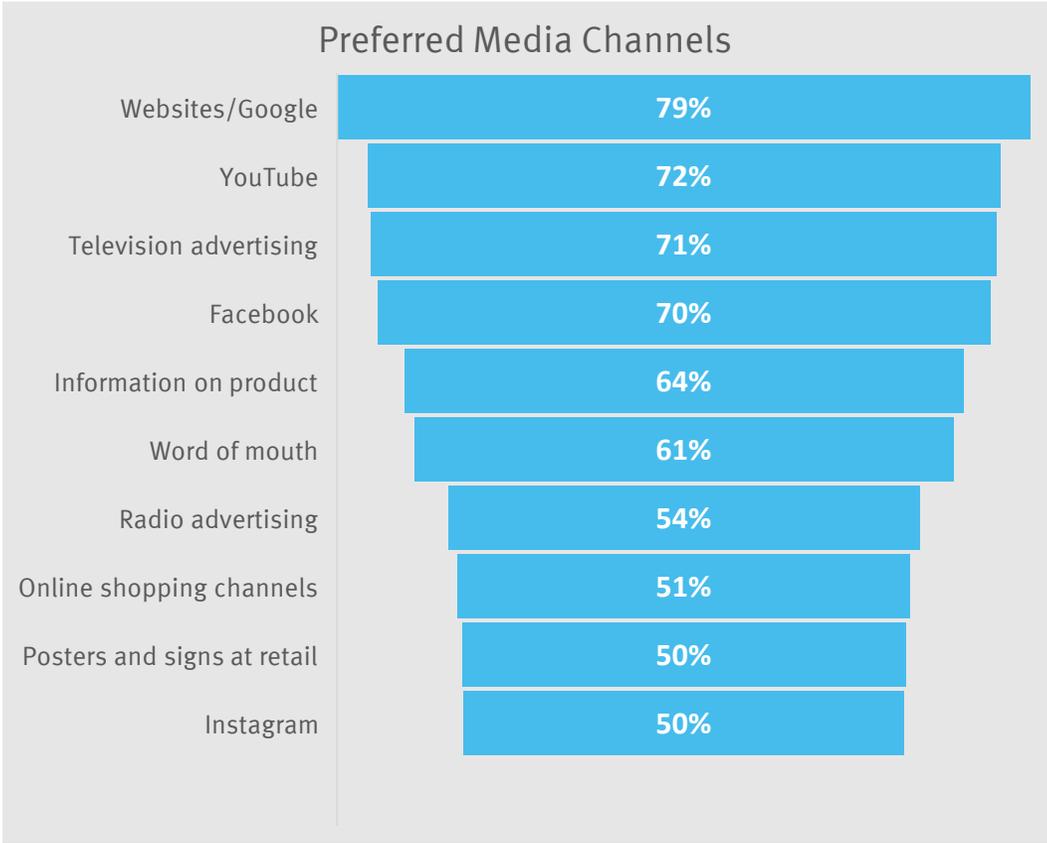
With the MSC you can choose products that are Good For You and the Ocean Too.

Put simply: Feel good.



# Targeting Supplement Shoppers

## Supplement shoppers USA



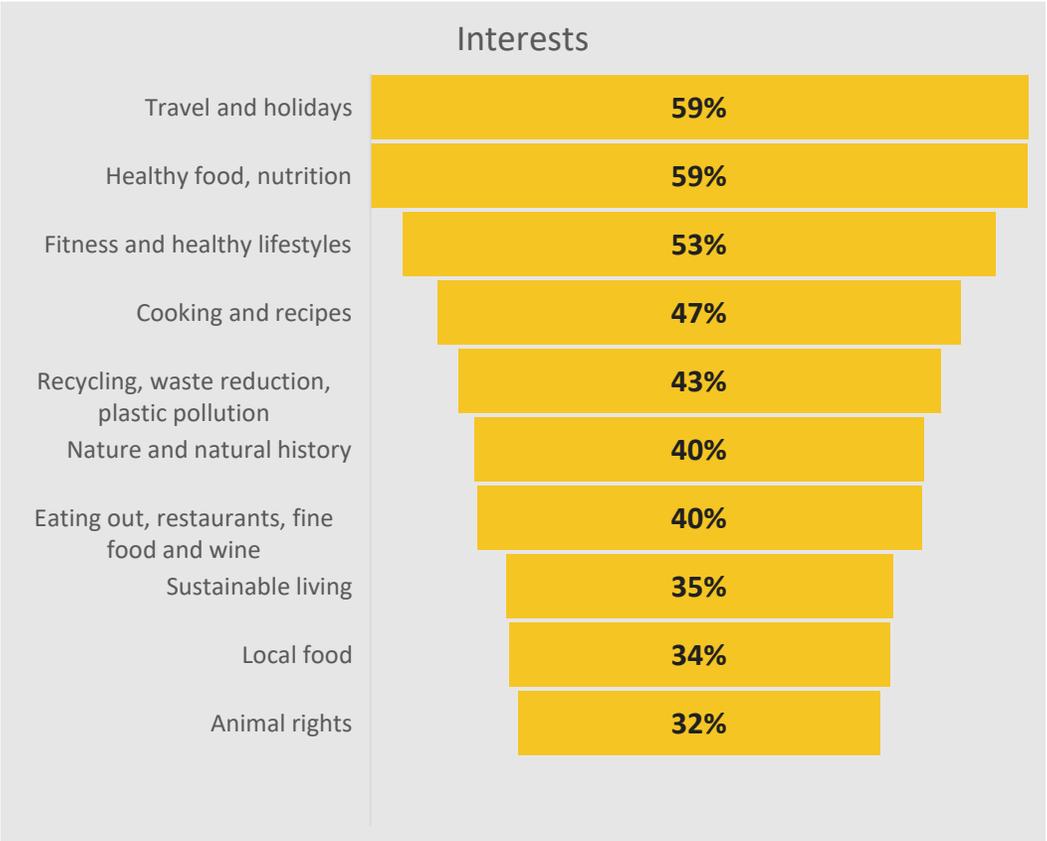
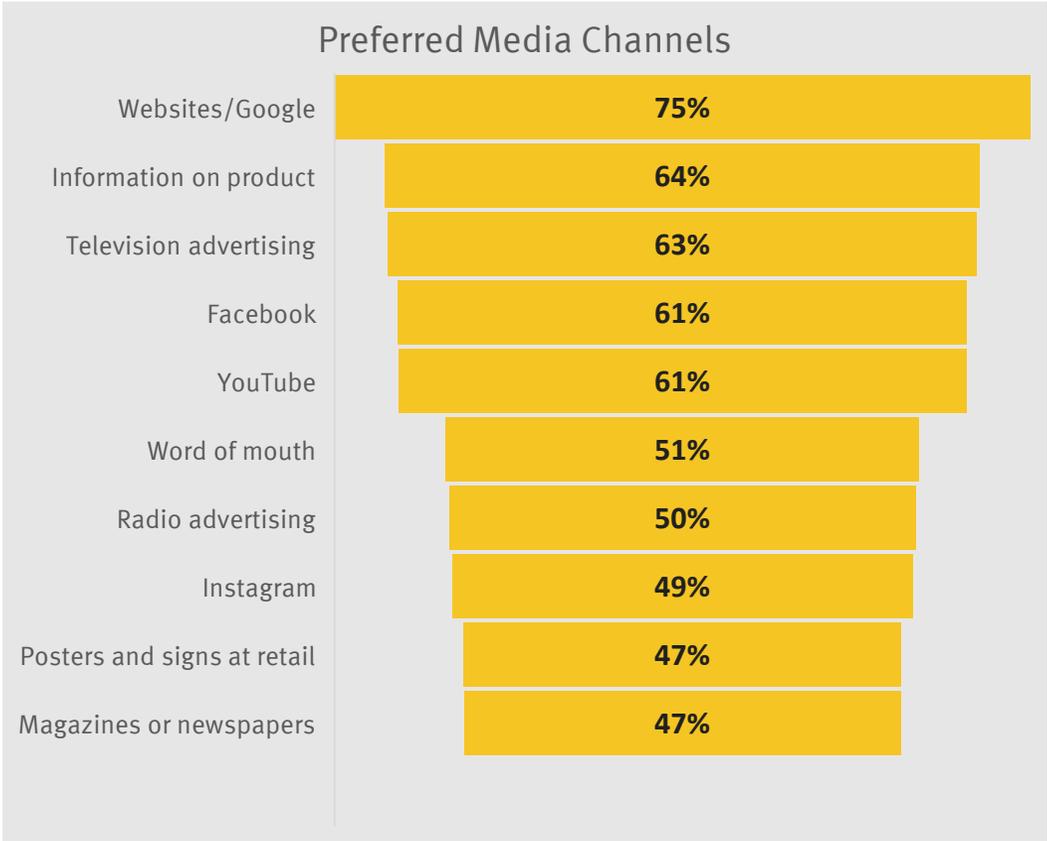
24 Q13.2: How often do you use, read, or visit the following types of media? (Top ten shown, at least weekly)

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



# Targeting Supplement Shoppers

## Supplement shoppers Europe\*

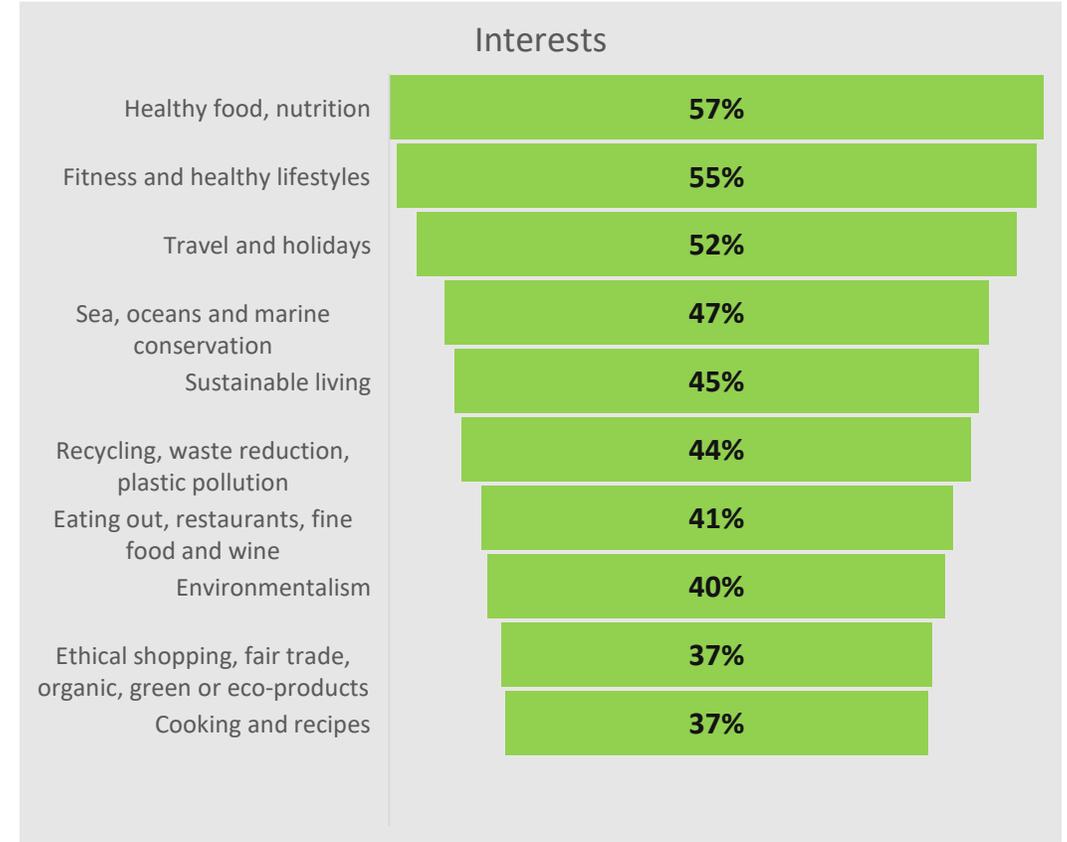
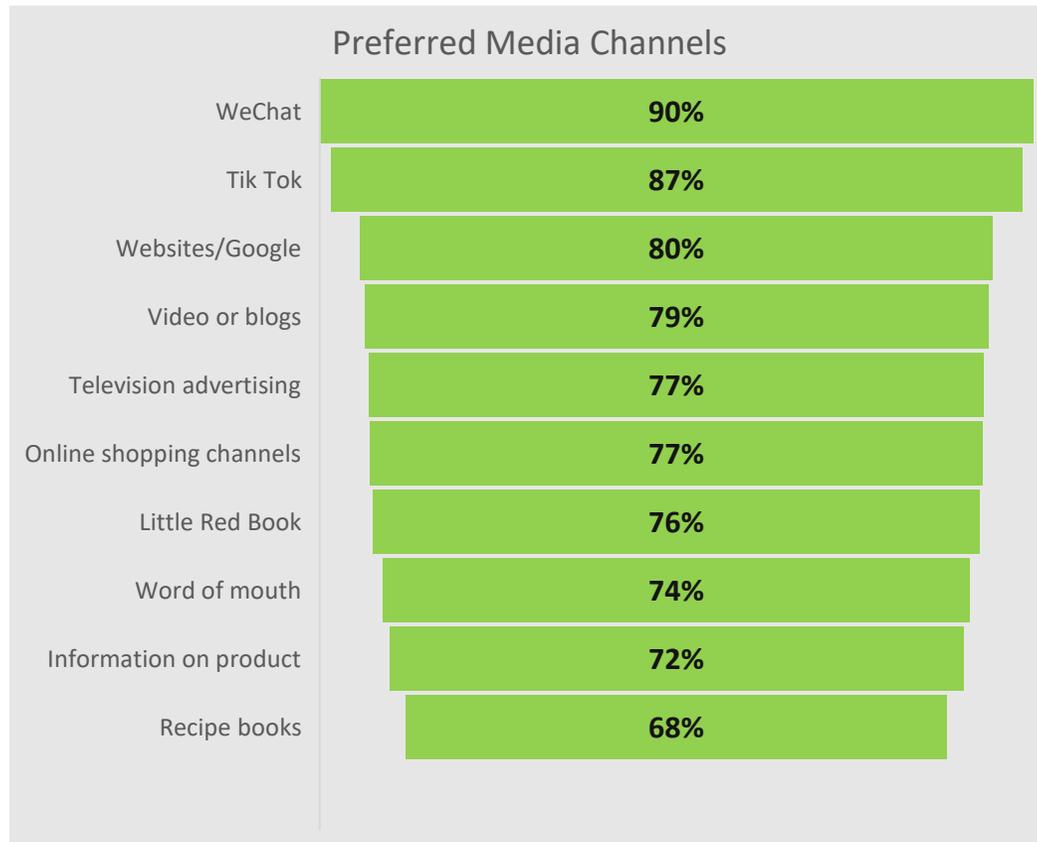


25 Q13.2: How often do you use, read, or visit the following types of media? (Top ten shown, at least weekly)

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

# Targeting Supplement Shoppers

## Supplement shoppers 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

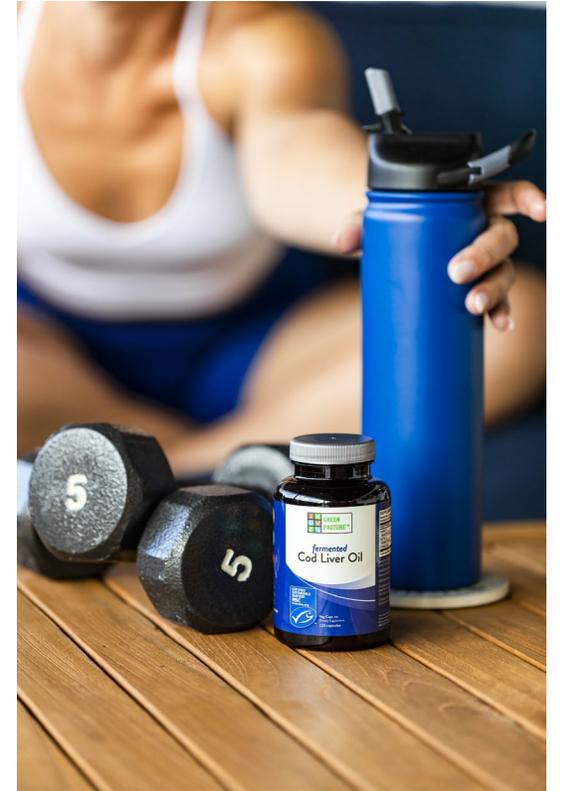
- Customizable social media templates
- Long and short form language templates
- Photography and videography from fisheries
- Lifestyle photography



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](mailto:Camila.Flanagan@msc.org)

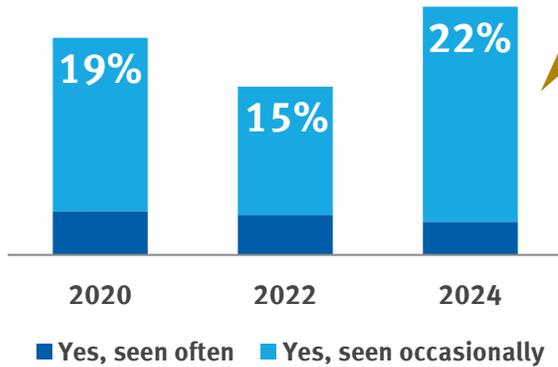
**Nicole Kunin, Commercial Manager, MSC US**

[Nicole.Kunin@msc.org](mailto:Nicole.Kunin@msc.org)



# 2024 GLOBESCAN RESEARCH: JAPANESE CONSUMER INSIGHTS SUMMARY

## Recognition of MSC label general public (unaided recall)



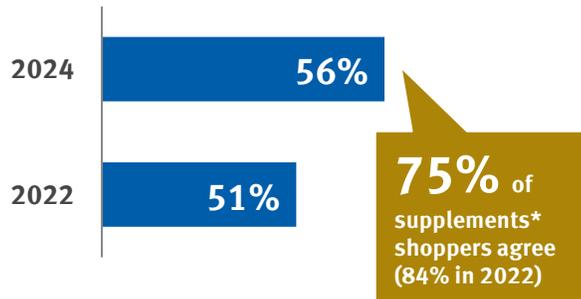
**37%** of supplements\* shoppers are aware (31% in 2022)

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



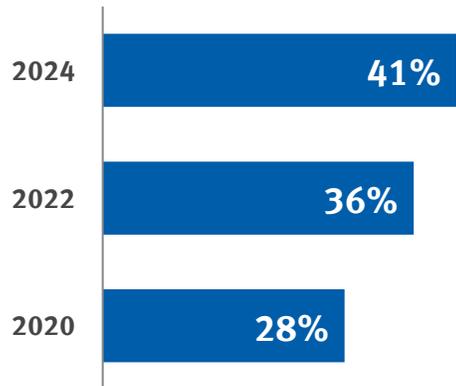
## Ecolabels on seafood products raise trust and confidence in the brand

Seafood consumers\*\* that agree



**75%** of supplements\* shoppers agree (84% in 2022)

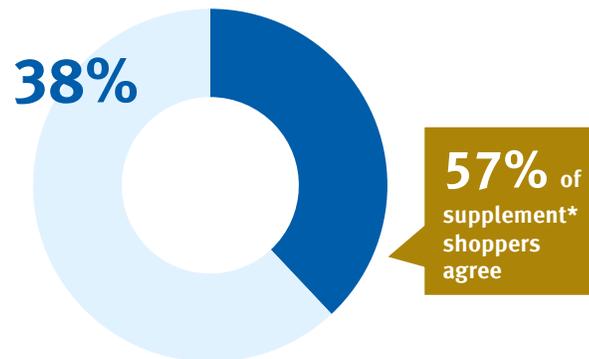
## Understanding of MSC label Among seafood consumers\*\* (free text answers)



**62%** of supplements\* shoppers understand (48% in 2022)

## MSC label increases likelihood of purchase

Seafood consumers\*\* that agree



**57%** of supplement\* shoppers agree

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

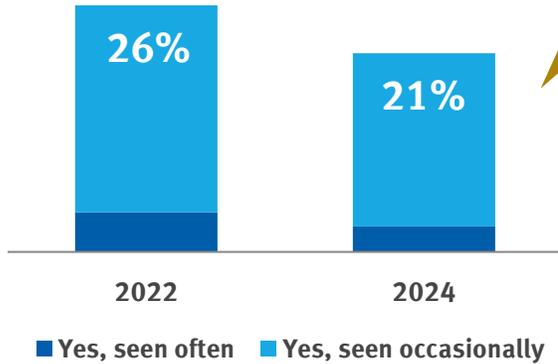
**52%** would like to hear more from companies about the sustainability of their seafood/fish products\*\* | **76%** of supplements\* shoppers agree

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



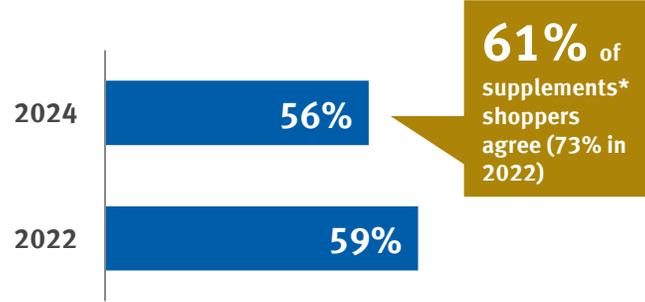
# 2024 GLOBESCAN RESEARCH: SOUTH KOREAN CONSUMER INSIGHTS SUMMARY\*

## Recognition of MSC label general public (unaided recall)



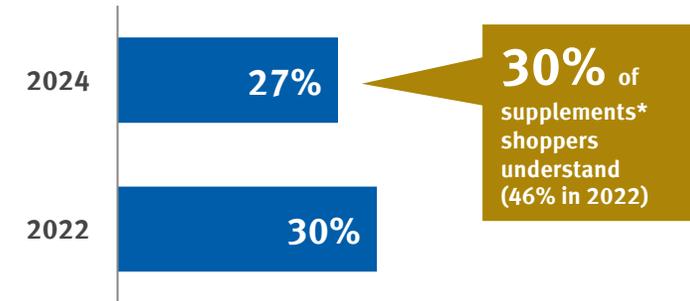
25% of supplements\* shoppers are aware (45% in 2022)

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



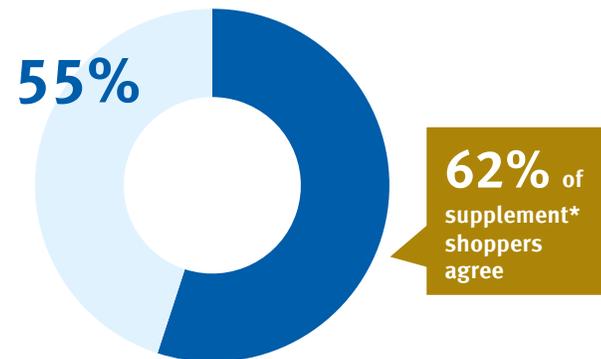
61% of supplements\* shoppers agree (73% in 2022)

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



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

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



62% of supplement\* shoppers agree



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

# 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

Survey was not run in South Korea before 2022

# Agenda

## Next calls for both committees

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



Thank you for joining us today.