

Sustainability Committee Call Minutes | February 21, 2024

Attended:

- Dimitri Sclabos, Tharos
- Jorge Garcia Herz, Marex Global Sourcing
- Laurel Sterling, Carlson Laboratories
- Jenna Ritter, Nature's Way
- Charles Davy, MBP
- Eiríkur Kristinnsson, Lysi
- Baldur Hjaltason, Pharma Marine
- Nicole Kunin, MSC
- Guido Medina, Pesquera Diamante
- Alexia Renard, Fermentalg
- Nicolas Huidobro, Golden Omega
- Ben Arceneaux, Nutrasource
- Stephanie Edgar, Nutrasource
- Lisa Burban, Fermentalg
- Katrina Benedicto, Nuseed
- Wenche Uksnøy, Blue Legasea
- **GOED:** Chris Gearheart, Ellen Schutt, Kaitlin Roke, Vicky Lin

Welcome new/returning members:

- Charles Davy, Sales and Supply Chain Manager, Cervonic
- Jorge Garcia Herz, Executive Managing Director, Marex Global Sourcing
- Jolie Root, Senior Nutritionist and Educator, Carlson Laboratories
- Laurel Sterling, Nutritionist and Educator, Carlson Laboratories
- Lisa Burban, Manager, Fermentalg
- Marie Jane Fallourd, BU Leader Functional Proteins, Fermentalg
- Alexia Renard, Fermentalg, Product Manager

ESG kudos to GOED members

- [TASA](#) received recognition as the leading company in the Merco Responsibility ESG 2023 ranking for the fishing sector. [Read on »](#)
- [Veramaris](#) has set its first Scope 3 greenhouse gas reduction target, aiming for a 22.5% absolute reduction by 2030 with an emphasis on both technical and operational improvements. [Read on »](#)
- [Sirio](#) received Friend of the Sea certification for its omega-3 products through the use of sustainably sourced fish oil and algae-based raw materials, along with various green technologies and energy-efficient measures. [Read on »](#)
- [Golden Omega](#) inaugurated the first Desalination Plant in Arica, Chile, which will reduce the use of drinking water by 95% and reduce the consumption of approximately 6,500 people per day from the public network, directly benefiting the community in a scenario of water scarcity. [Read on »](#)
- [Zooca](#) has renewed its Friend of the Sea Certification. [Read on »](#)
- [Thai Union](#) has secured a US\$328 million (€303 million) sustainability-linked financing package to extend its achievements in sustainable fisheries to responsible aquaculture. The aim is to establish new global standards and practices for the aquaculture industry. [Read on »](#)
- [Aker Biomarine](#) is sharing a decade of echosounder data from Southern ocean fishing

missions with non-profit foundation HUB Ocean to provide valuable insights for scientists studying krill swarms, migration dynamics, and predator behavior. This collaboration is contributing to a better understanding of how climate change impacts the Antarctica krill.

[Read on »](#)

- Laurel: Carlson is a US company housed in Chicago, Illinois, but we are a global company. We distribute fish oils and other products. We have been members of the Friend of the Sea for years. We also use low impact fisheries, and the fish that we use have life cycles that are easily reusable. We've recently gotten involved with companies and taken products that they're discarding (i.e. fish eggs, caviar) and reuse them for other products. We are making our packaging more sustainable by working with Impact collective and Greenprint. Our goal is to be plastic neutral. So for every bottle we put out, we will also take the same amount of plastic out of the sea. We hit that goal in 2023 and we continue to do it.

Presentation

- Topic: Sustainability in the Minds of Global Consumers: Internet Search Trends since 2004
- Speaker: Chris Gearheart, Directory of Growth & Engagement, GOED • Q&A and discussion
- [Watch the recording here](#). Passcode: 4@Xsr=bF

Q&A and discussion

- Laurel: Great info! Happy to see the UN SDG. We're connected to that by proxy with our work with Impact Collective. We've hit goals 6, 8, and 14 - clean water, developing jobs. We're happy to be involved in that and I'm glad to see how that connects to increase in searching.
- Chris: I would argue that however you frame those initiatives, by communicating them with these goals leads to more traction. We know GOED members have efforts outside of these goals, and those are obviously still valuable. Global consumers seem to understand the goals.
- Laurel: We know the growing younger population (ages 18-24) are looking the packaging and looking for sustainability, who are you as a company and what you represent. We've been involved in fish sustainability for years but we want to take it one step further because there is more demand now. They care about the product within and the packaging on the outside. Companies not following this trend would be left behind.
- Chris: For those who are new to this committee, one of our first presentations for this committee was from The 6AM Agency and they talked about this population shift. Thanks for joining us today!

Next call: March 20 | 14:00 UTC | [\[Click for your local time zone\]](#)

GOED Newsletters: If you do not receive newsletters from GOED, such as the weekly *GOED Current*, please sign up here: <https://goedomega3.com/members/subscribing-goed-current> If you don't have access to GOED's Dashboard for members, please register here:

<https://www.goedomega3.com/account>.

Sustainability in the Minds of Global Consumers

Internet Search Trends since 2004

Chris Gearheart

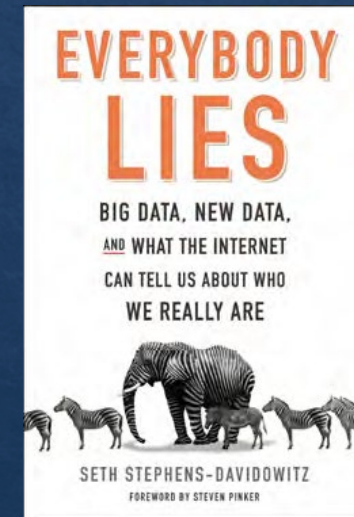
GOED Exchange 2024

Thursday, January 25, 2024

Public Google data offer unique information about consumers' thoughts and concerns about different topics.

“People’s search for information is, in itself, information. The everyday act of typing a word or phrase into [a search engine] leaves a small trace of truth that, when multiplied by millions, eventually reveals profound realities.”

- Former Exchange speaker Seth Stephens-Davidowitz



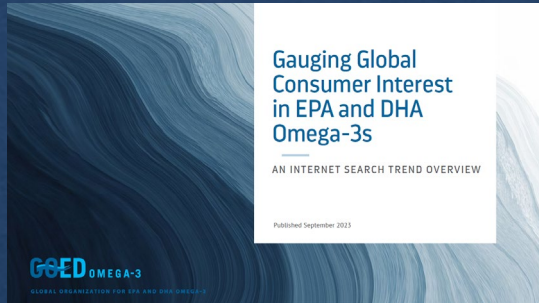
Public Google data tools offer unique information about consumers' thoughts and concerns about different topics.

Google has retained a
~90% market share
in all search traffic since
2009.

Source: StatCounter.com

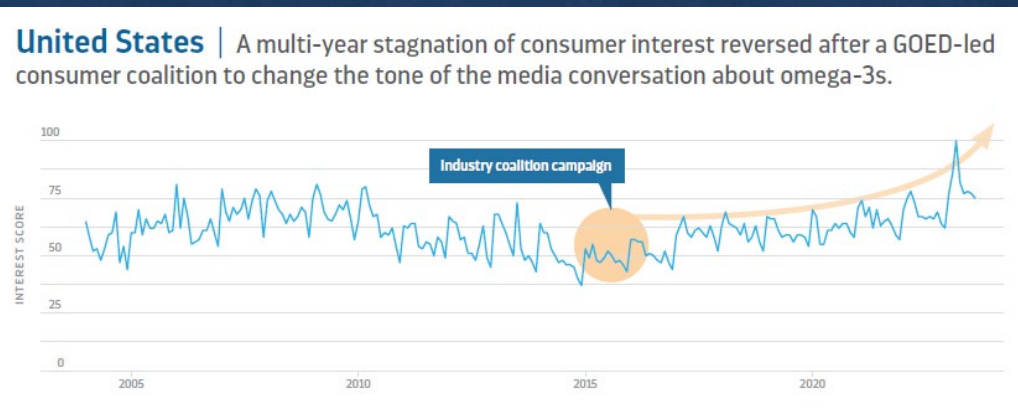


Public Google data tools offer unique information about consumers' thoughts and concerns about different topics.



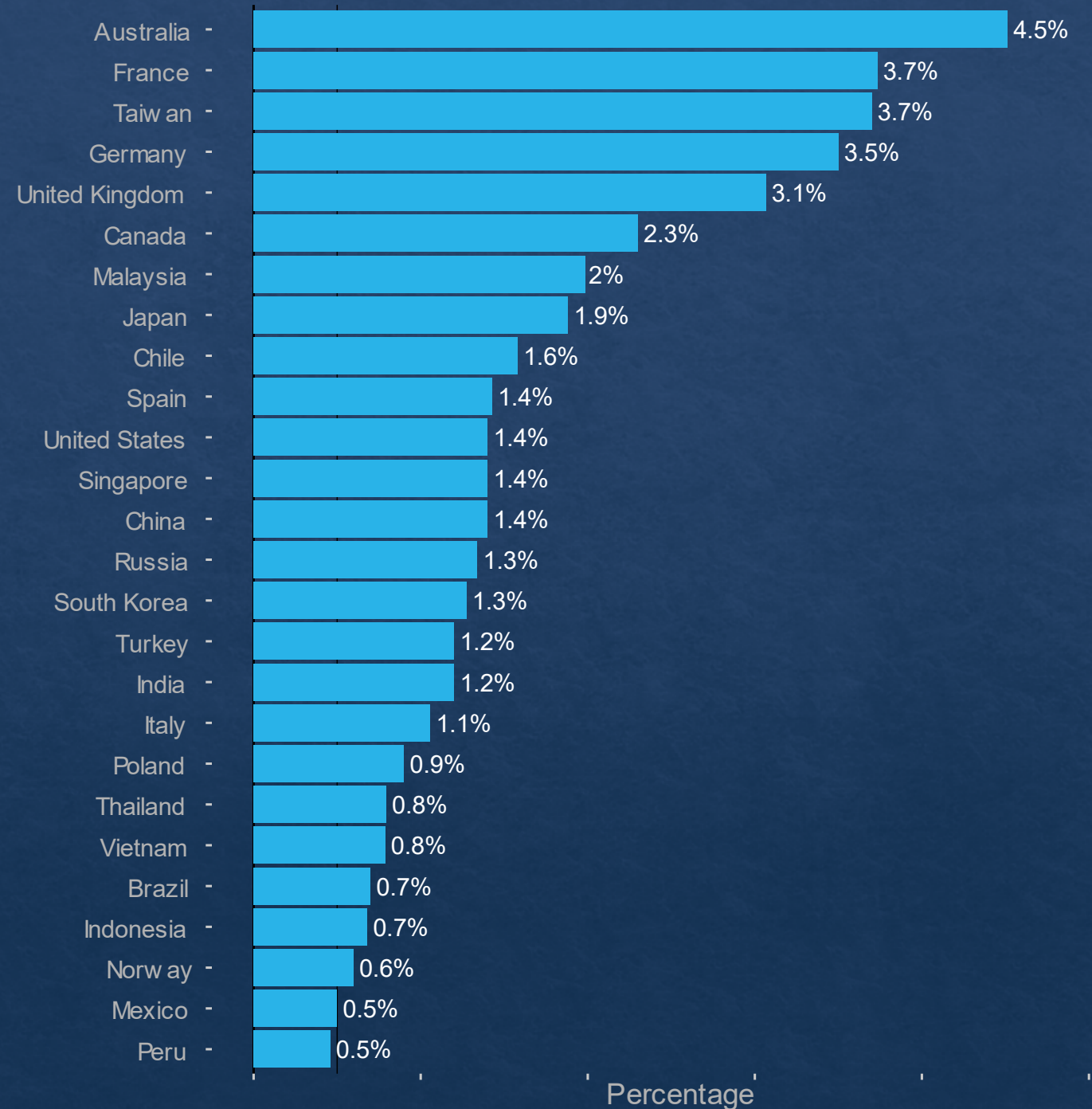
Google search data on omega-3s has withstood our cross-examination and confirmed our insider knowledge of the omega-3 industry.

We are not equally experienced in the sustainability space, but we have reason to think that these trends we see today will have something to teach us.



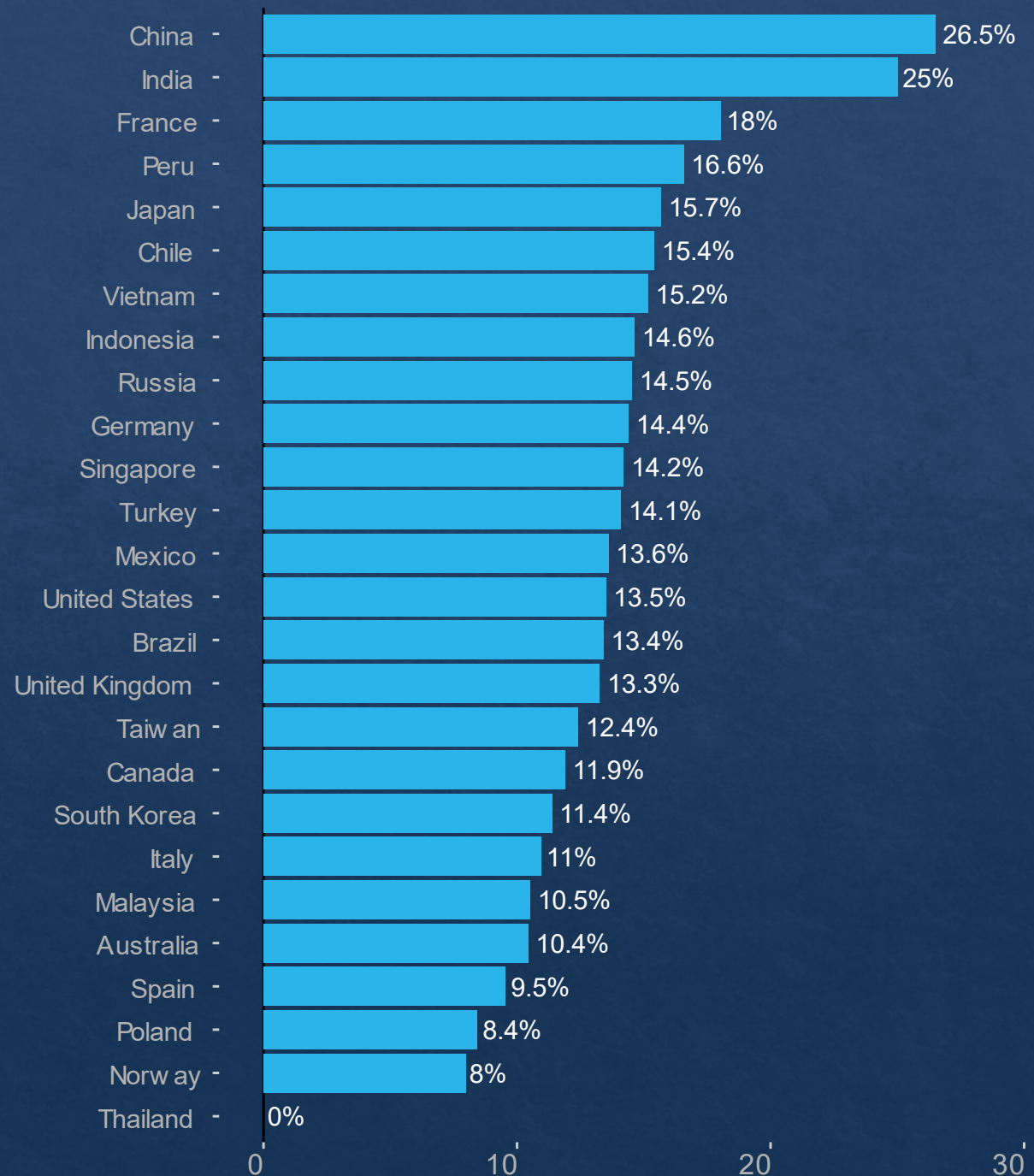
Relatively few consumers in GOED's consumer survey database report sustainability as a **reason for NOT taking omega-3s.**

According to the most recent consumer survey for each country in GOED's library.



A much higher percentage of consumers in those countries list sustainability among their **key purchase influencers**.

That fact that it's not an obstacle to purchase now doesn't mean it can't become one if consumers continue to pay attention to the topic.



A much higher percentage of consumers in those countries list sustainability among their **key purchase influencers**.

A slightly higher percentage of younger cohorts of consumers name sustainability as a general influencer in their purchases.

Respondent Age Group	Percentage with sustainability as a purchase influencer
18-24	16%
25-34	16%
35-44	14.3%
45-54	11.8%
55+	12.5%

How has interest in sustainability changed over the last 20 years?

For the next 20 minutes —

1. Interest in the concept of sustainability is growing.
2. Most queries about sustainability seem scientific, technical, regulatory or bureaucratic in nature rather than consumer-driven.
3. Consumer interest in marine-related sustainability subjects shows uncertain trends.

Public Google data tools can parse consumers' thoughts and concerns across dozens of languages.

Special vocabulary

The Google Trends dashboard aggregates interest in different subjects into

[topics]

across dozens of languages, making it easier to follow trends worldwide.

“Topics” used in this report

Sustainability | 可持续性 | 지속 가능성 | sostenibilidad | ความยั่งยืน

Sustainable fisheries | βιώσιμη αλιεία | устойчивое рыболовство

Natural environment | natürlichen | lingkungan alam | naturlige omgivelser

Overfishing | pesca eccessiva | 乱獲 | liikakalastus | ການຫາບາດ

ESG | البيئية والاجتماعية والحوكمة | milieu, sociaal, bestuur | environnement

CSRD

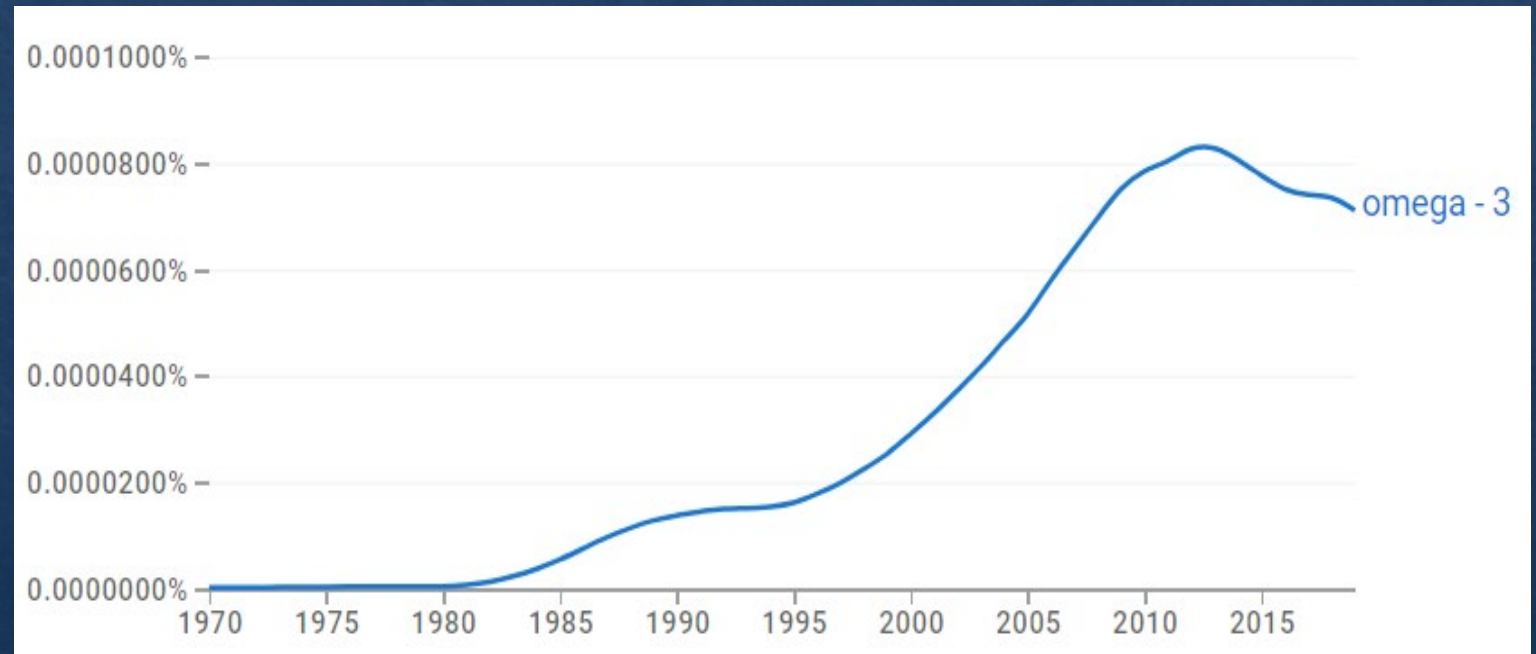
[More]

Global Search Trends, 2004-2024

Related to “sustainability” and “natural environment”

The concept of environmental sustainability entered the mainstream English-language lexicon in the 1980s.

The word “sustainability” first started appearing in books and articles in the 1980s, around the time the term was used in the report from the UN World Commission on Environment and Development (or “Brundtland Commission”) **“Our Common Future”** in 1987.



For the past 20 years, Google searches related to “sustainability” largely related to the natural environment and technical stewardship.

Top 10 Related Topics

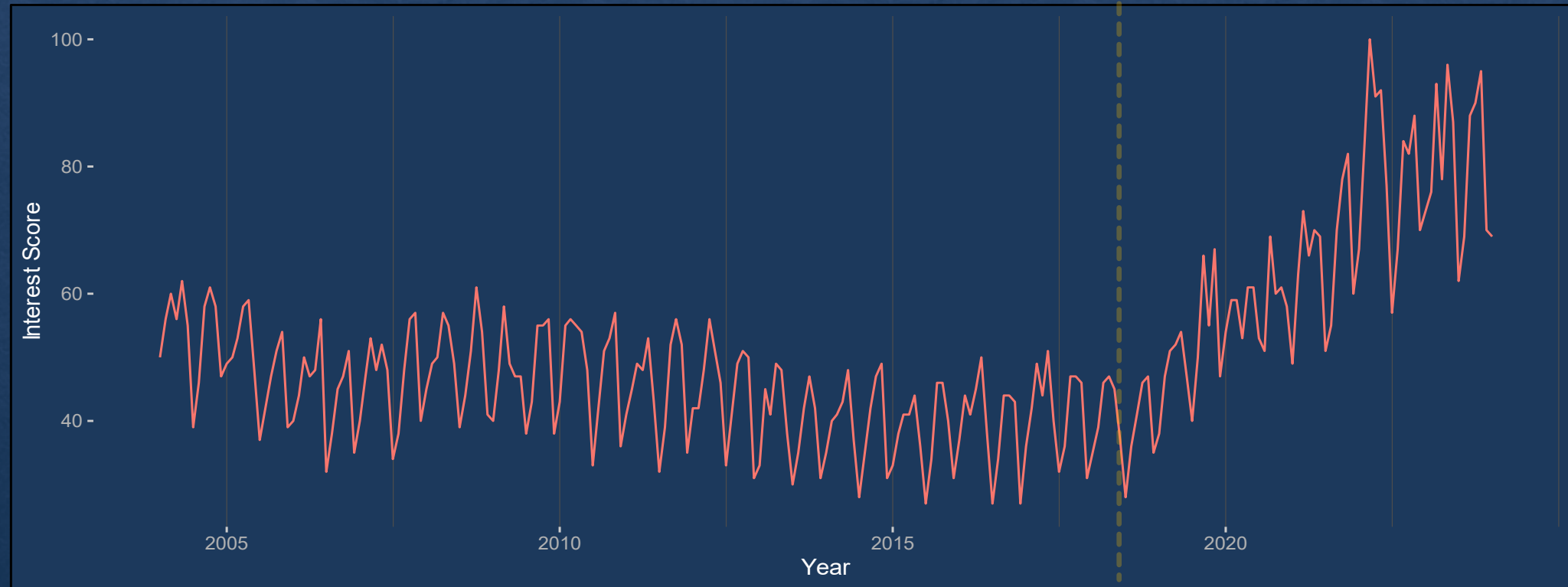
1. **Sustainable development**
2. **Economic development**
3. **Natural environment**
4. **UN Sustainable Development Goals (SDGs)**
5. **Energy**
6. **Goals**
7. **Management**
8. **Human development**
9. **Agriculture**
10. **Resources**

Notable Fast-Rising Topics

1. **Environmental, social and corporate governance (ESG)**
2. **Success/succeeding**
3. **Environmental degradation**
4. **Sustainable fashion**

Interest in sustainability was flat or even declined between 2004-2018, but has increased steadily over the past five years.

Rate of Google search queries related to sustainability



Many top-related topics over 20 years were consistent, but several changed between the flat and growth periods.

Top 10 Related Topics (Flat Period)

1. **Sustainable development**
2. **Economic development**
3. **Natural environment**
4. **Energy**
5. **Human development**
6. **Agriculture**
7. **Project**
8. **Management**
9. **UN Sustainable Development Goals (SDGs)**
10. **Tourism**

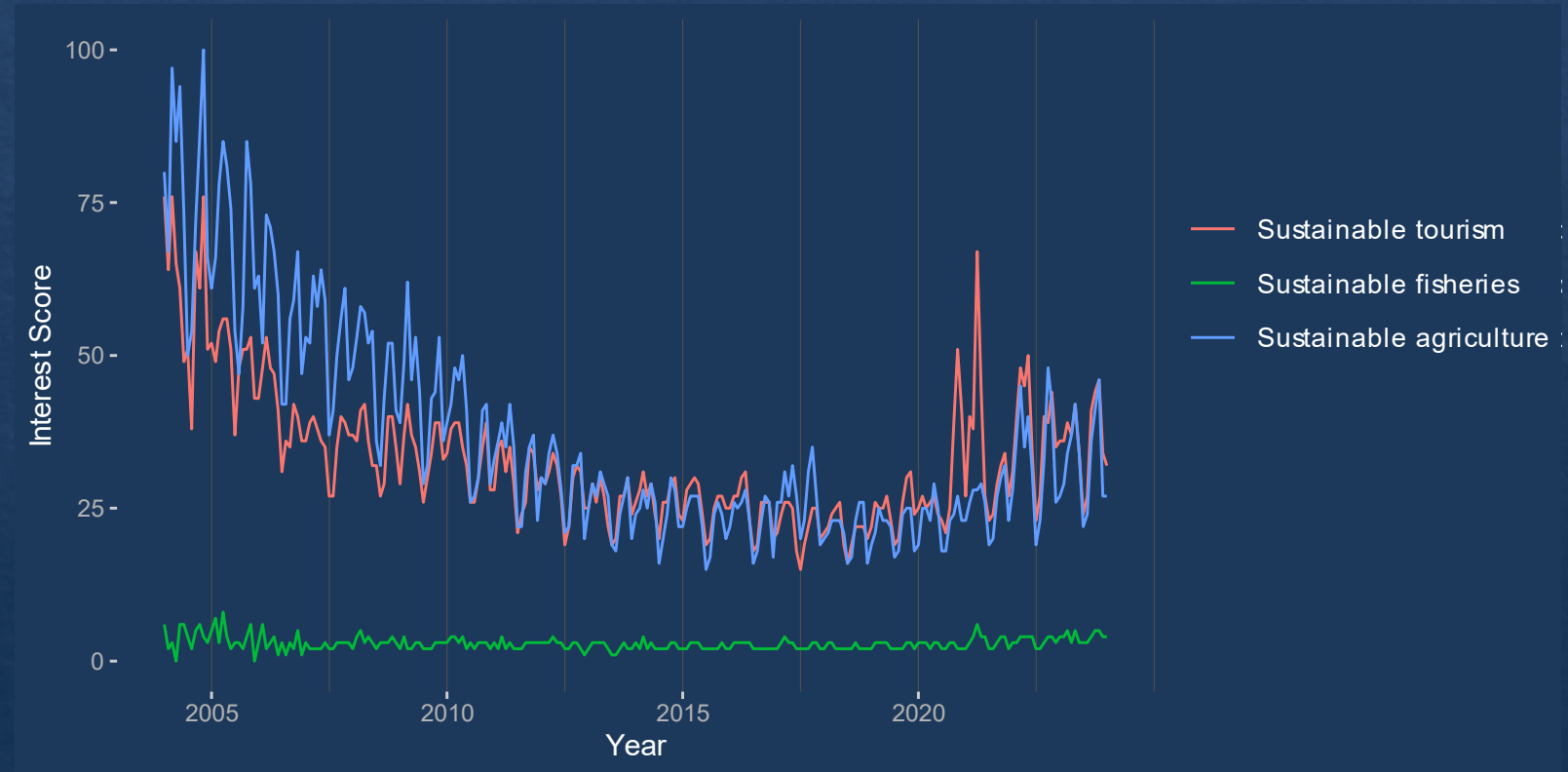
Top 10 Related Topics (Growth Period)

1. **Sustainable development**
2. **Economic development**
3. **Natural environment**
4. **UN Sustainable Development Goals (SDGs)**
5. **Energy**
6. **Goals**
7. **Report**
8. **Economy**
9. **Management**
10. **Resources**

Many top-related topics over 20 years were consistent, but several changed between the flat and growth periods.

What changed?

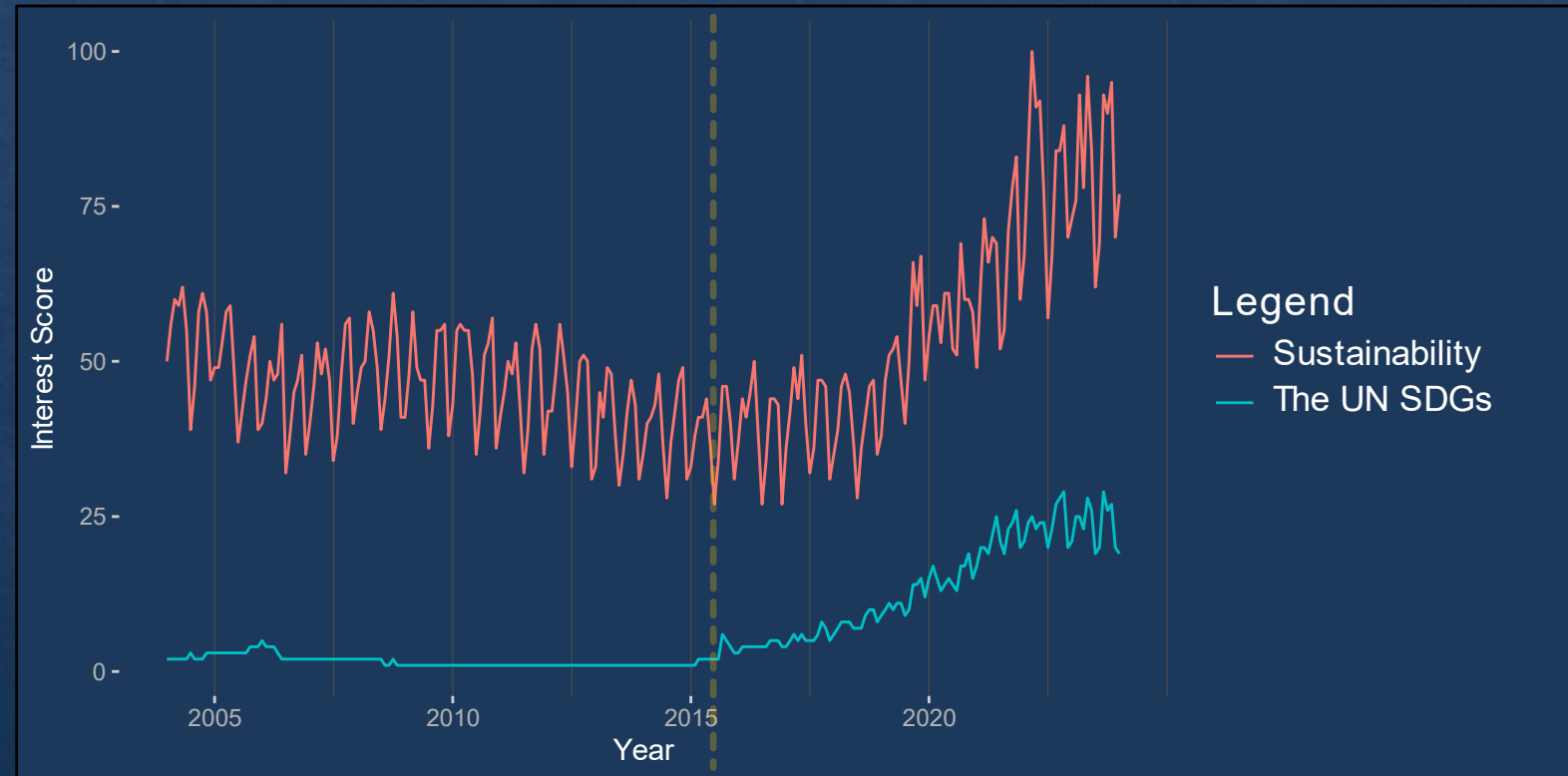
Several topics decreased over time. “Sustainable agriculture,” “sustainable tourism,” and “sustainable energy” have either lost standing in or disappeared from the top ten topics since 2004.



Many top-related topics over 20 years were consistent, but several changed between the flat and growth periods.

What changed?

There is increased interest in global collaboration and information-sharing — topics like the UN SDGs, and “reports,” “goals,” and “economy.”



Many top-related topics over 20 years were consistent, but several changed between the flat and growth periods.

What changed?

Increased interest in a world-scale focused on sustainable collaboration — topics like the UN SDGs, and “reports,” “goals,” and “economy.”

SDGs for GOED

The SDGs tell us which aspects of business have the biggest impact of our global biosphere and economy.

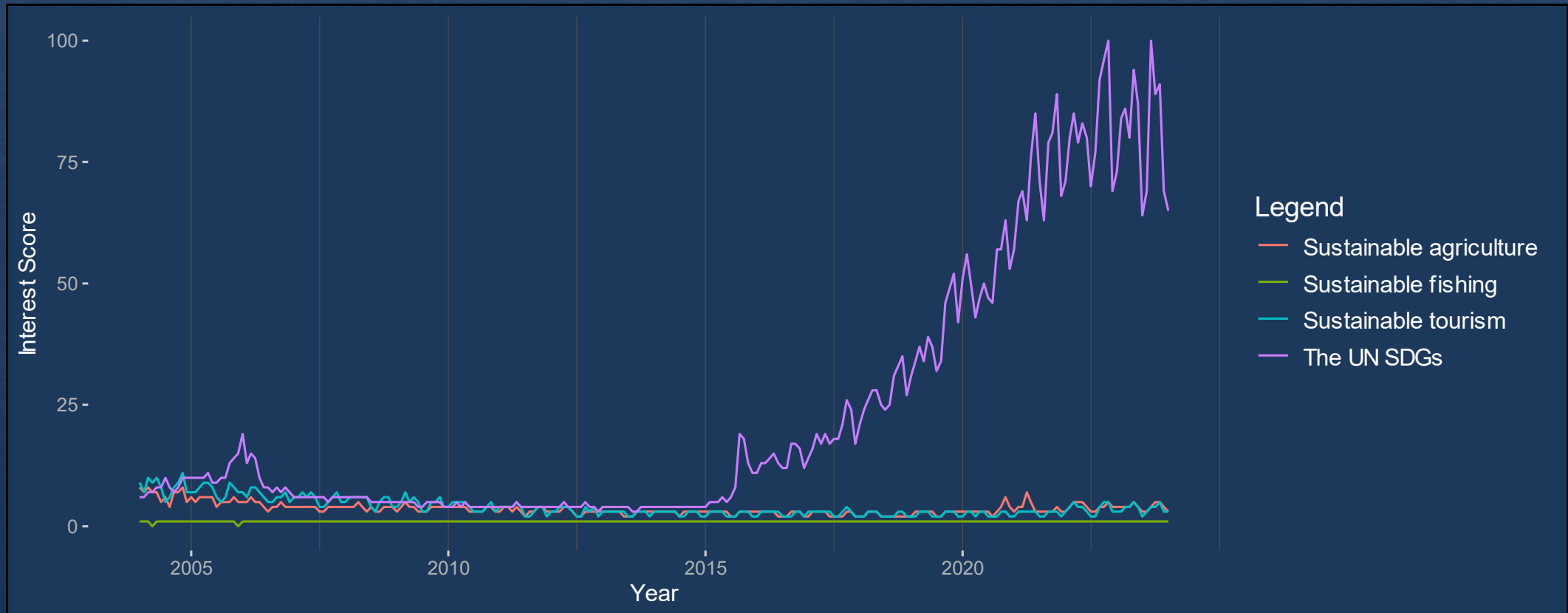
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high-powered GOED members use the UN SDGs to guide and communicate their ESG strategy.

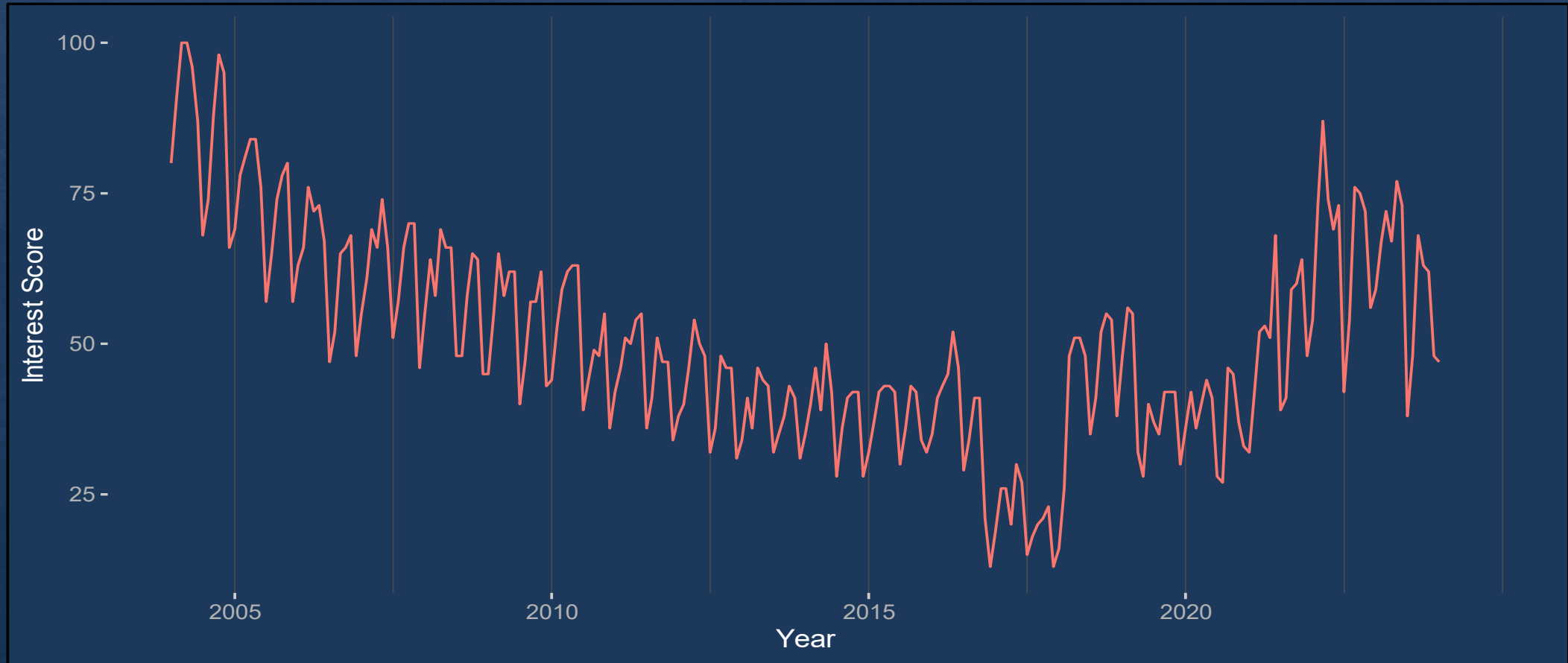


Source: GOED Exchange 2022 Presentation

What could this tell us? Actions by regulators and governments are driving interest in a large-scale, joint approach to sustainability.



Not Just Governance - Interest in the natural environment declined from 2004-2018 but has also increased over the past five years.



Many top-related topics related to the environment over 20 years were consistent, but a few changed between the flat and growth periods.

Top 10 Related Topics (Flat Period)

1. **Pollution**
2. **Health**
3. **Environmental Issues**
4. **Education**
5. **Nature**
6. **Law**
7. **Environmental Protection**
8. **Science**
9. **Engineering**
10. **Management**

Top 10 Related Topics (Growth Period)

1. **Pollution**
2. **Human**
3. **Health**
4. **Nature**
5. **Science**
6. **Life**
7. **Environmental Protection**
8. **Sustainability**
9. **Environmental Issues**
10. **Management**

Regional Search Trends, 2004-2024

Related to “sustainability” and “natural environment”

Since 2018, many global cities with the most per-capita search interest in sustainability have been Dutch, German or Swiss German.

- Inhabitants of Suva, the capital of the island nation of Fiji whose economy (largely focused on agriculture and tourism) and domestic infrastructure could be sensitive to climate change, were a notable exception at #3.
- Per capita sustainability search interest in Toluca and other cities near Mexico City was also high.
 - **Note:** One rapidly growing subtopic of interest in Mexico was *vida submarina*, which is the translation for UN SDG 14, called “Life Under Water” in English.



Utrecht



Delft



Suva



Amsterdam



Nijmegen



Haren



Rotterdam



Toluca



Zürich



Münster

In the last 20 years, many per capita searches about the natural environment were made from Latin America and Southeast Africa

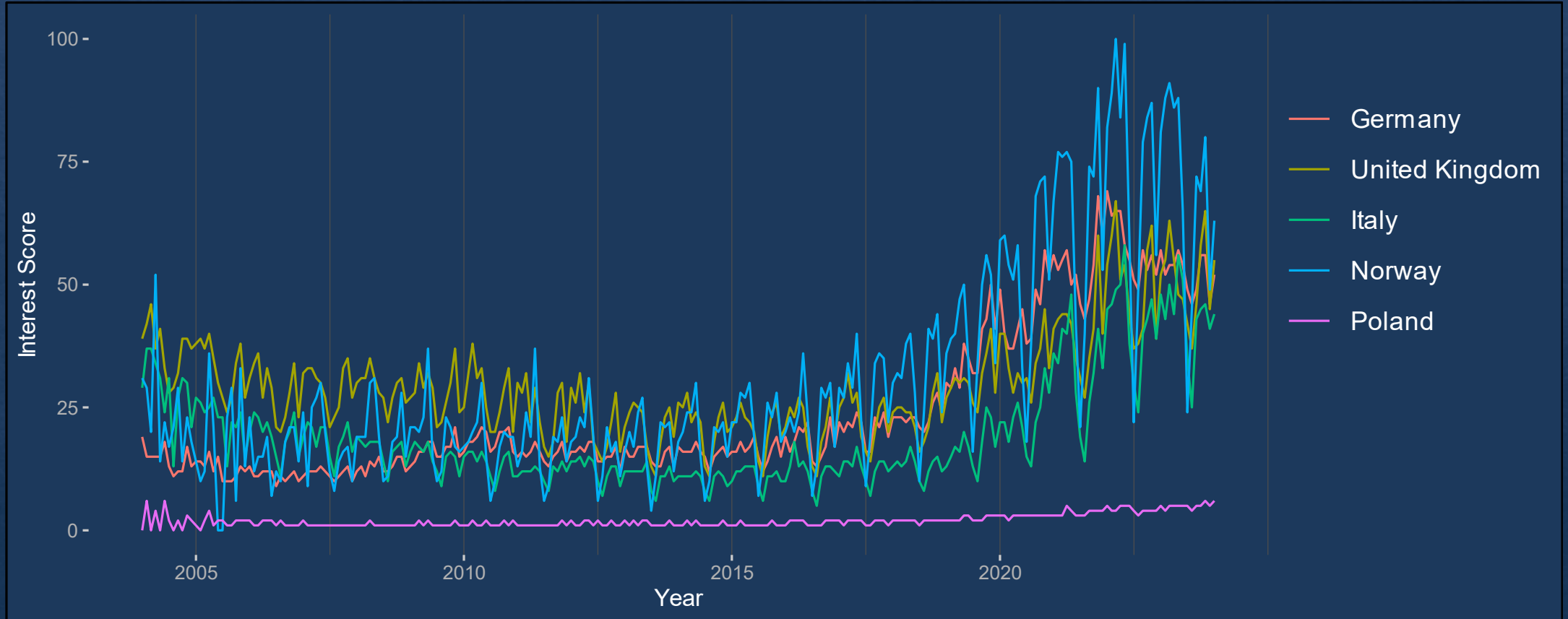
Per capita, many of the regions that investigated this topic were from Latin America and Eastern and Southern Africa.

Some of those countries, like Kenya and Ethiopia, have low internet penetration, suggesting the topic is of concern only among the consumer classes that have internet access.

South Africa, Peru and several other countries, however, have 70%+ internet penetration, suggesting that the topic is of broad interest there, not just among those wealthy enough to afford internet access.



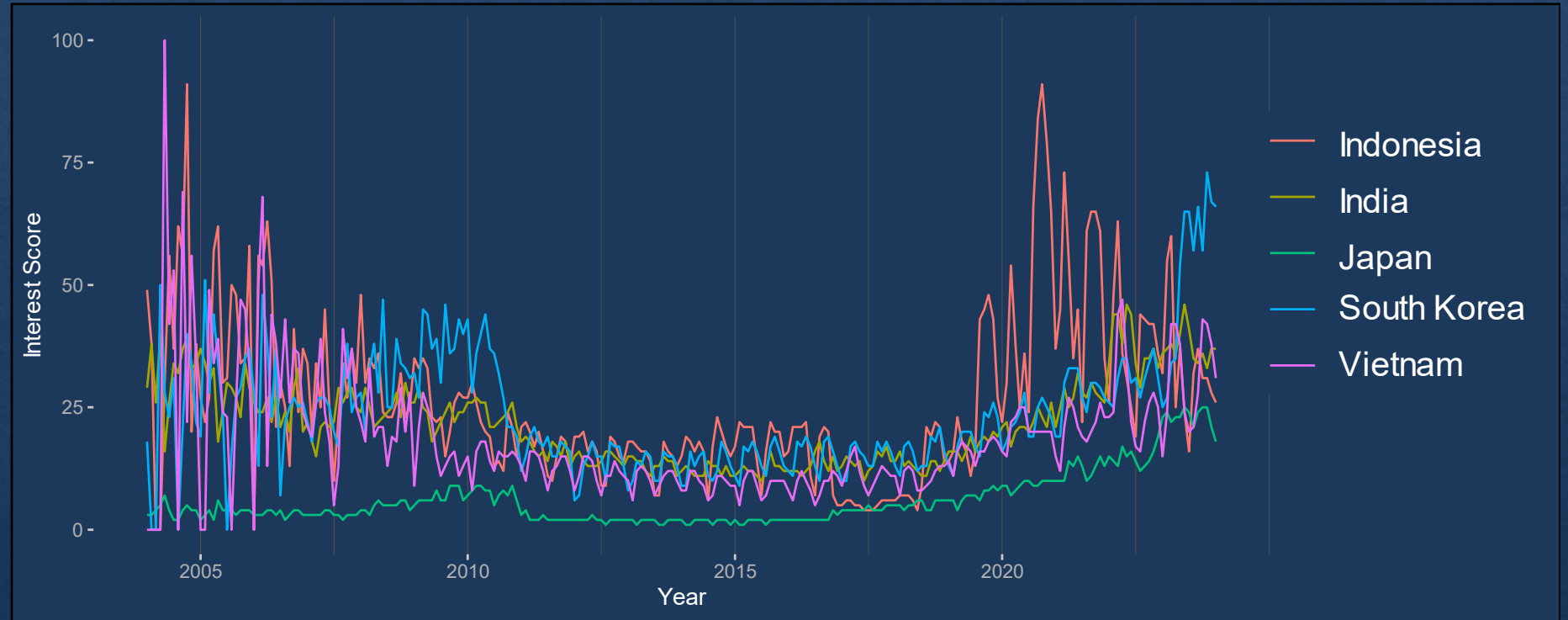
EUROPE | Sustainability interest in several key markets in Western, Southern and Nordic Europe is growing.



ASIA | Per-capita interest in sustainability has increased in many markets, with Korea showing the most interest, especially in 2023.

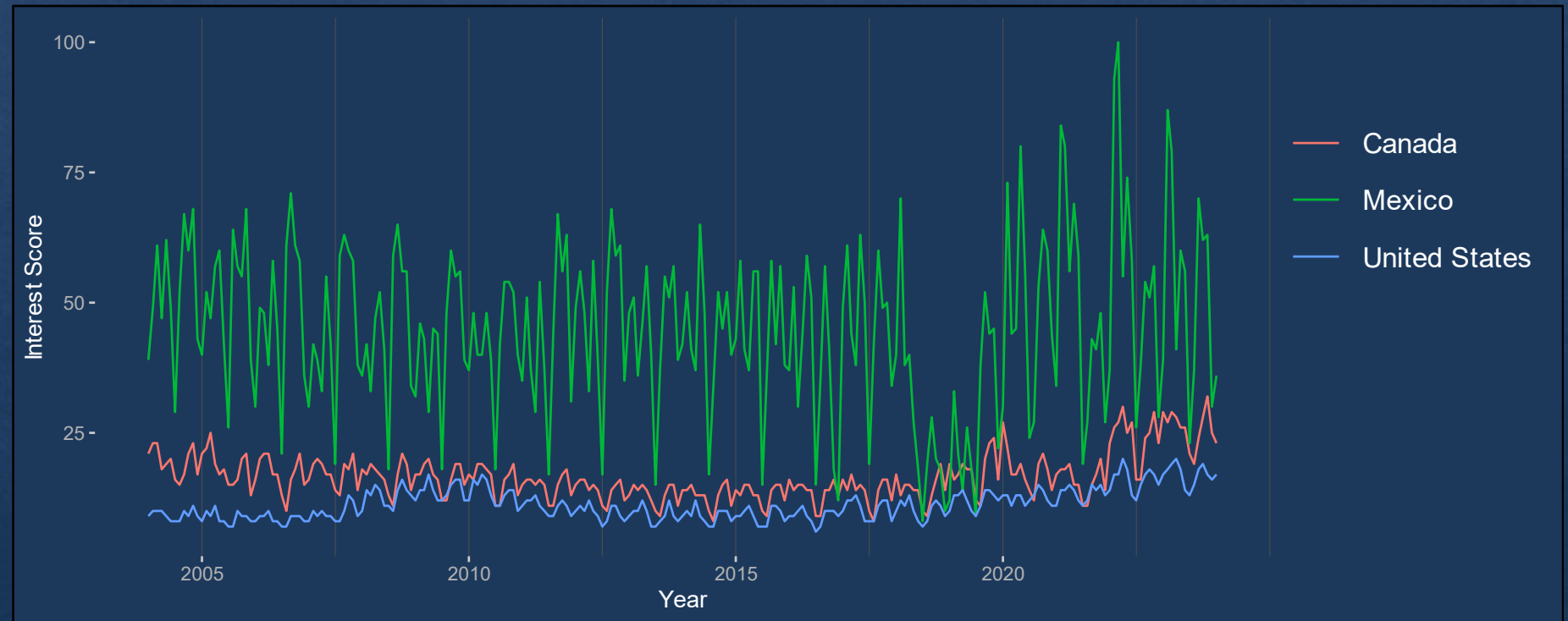
Baseline interest in Korea spiked in the spring of 2023 and has grown steadily.

During that period, Samsung announced its intention to achieve 100% renewable energy use for all its facilities by 2050. A Korea-EU summit also focused on joint environmental stewardship. The nation's first college degree program in sustainable development opened last January.



North America | Mexican consumers were the most interested in sustainability, per capita.

The US had the most average monthly searches (110,000) for “sustainability” compared to Canada and Mexico, but Mexican consumers were the most interested relative to the total number of searches in the country.



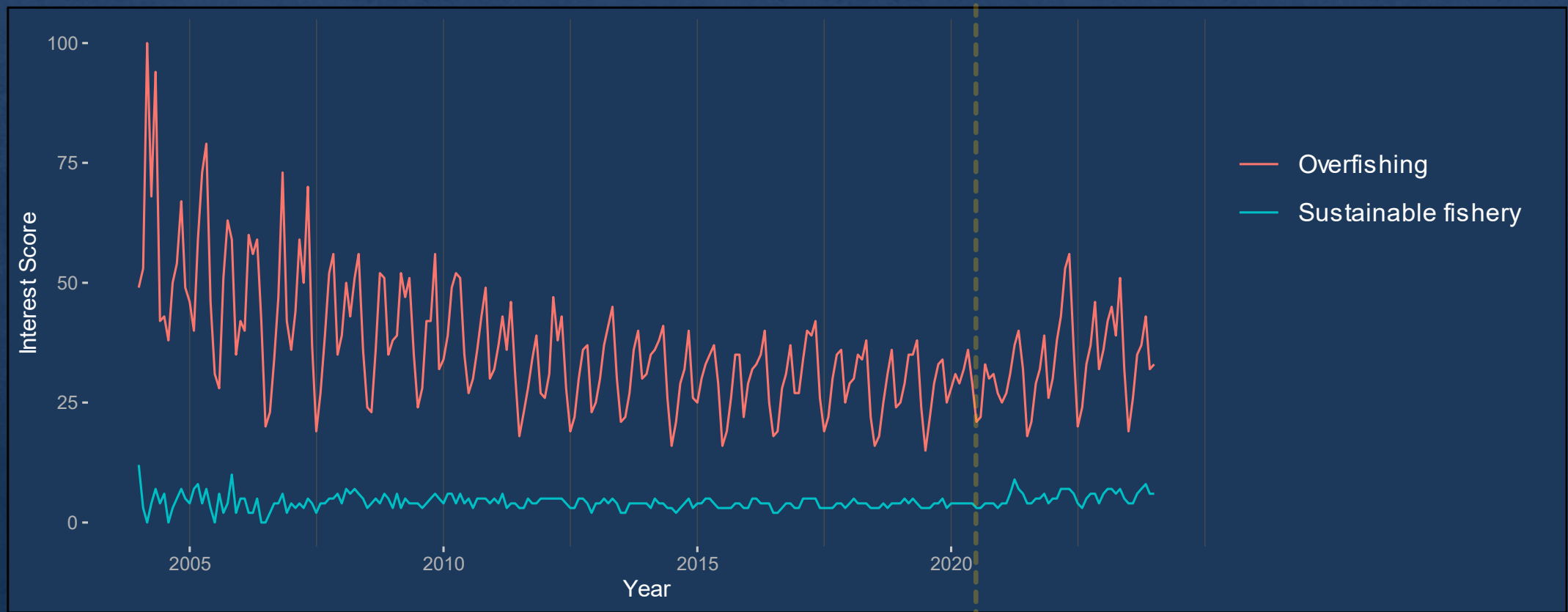
Mid-talk takeaways

1. The growing search interest in sustainability has, per capita, been largely scientific or technical, and has skewed towards “big-picture” governance and compliance-related subjects over the past five years.
2. Global commitments like the UN Sustainable Development Goals and related messaging appear to affect public mindsets and curiosity.
3. While many large, industrialized economies generate the most gross search interest in omega-3s, many countries in the “global south” generate high per-capita rates of interest in sustainability and the environment.

Global Search Trends, 2004-2024

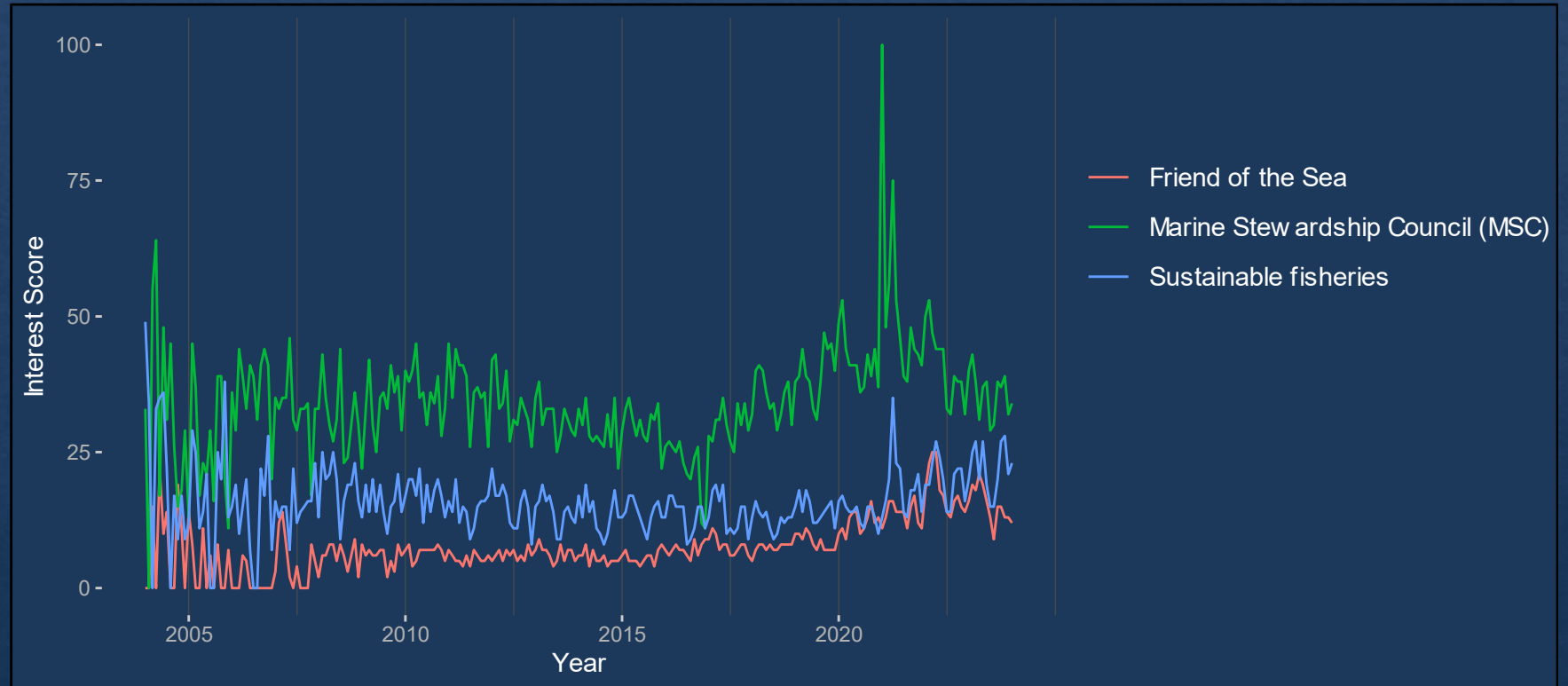
Related to sustainable fisheries or ocean health

Interest in overfishing has contracted for many years but may have started increasing five years ago.



In 2021, many GOED members claimed participation in Friend of the Sea and the Marine Stewardship Council (MSC).

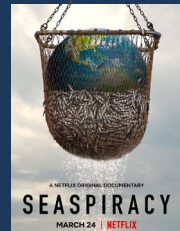
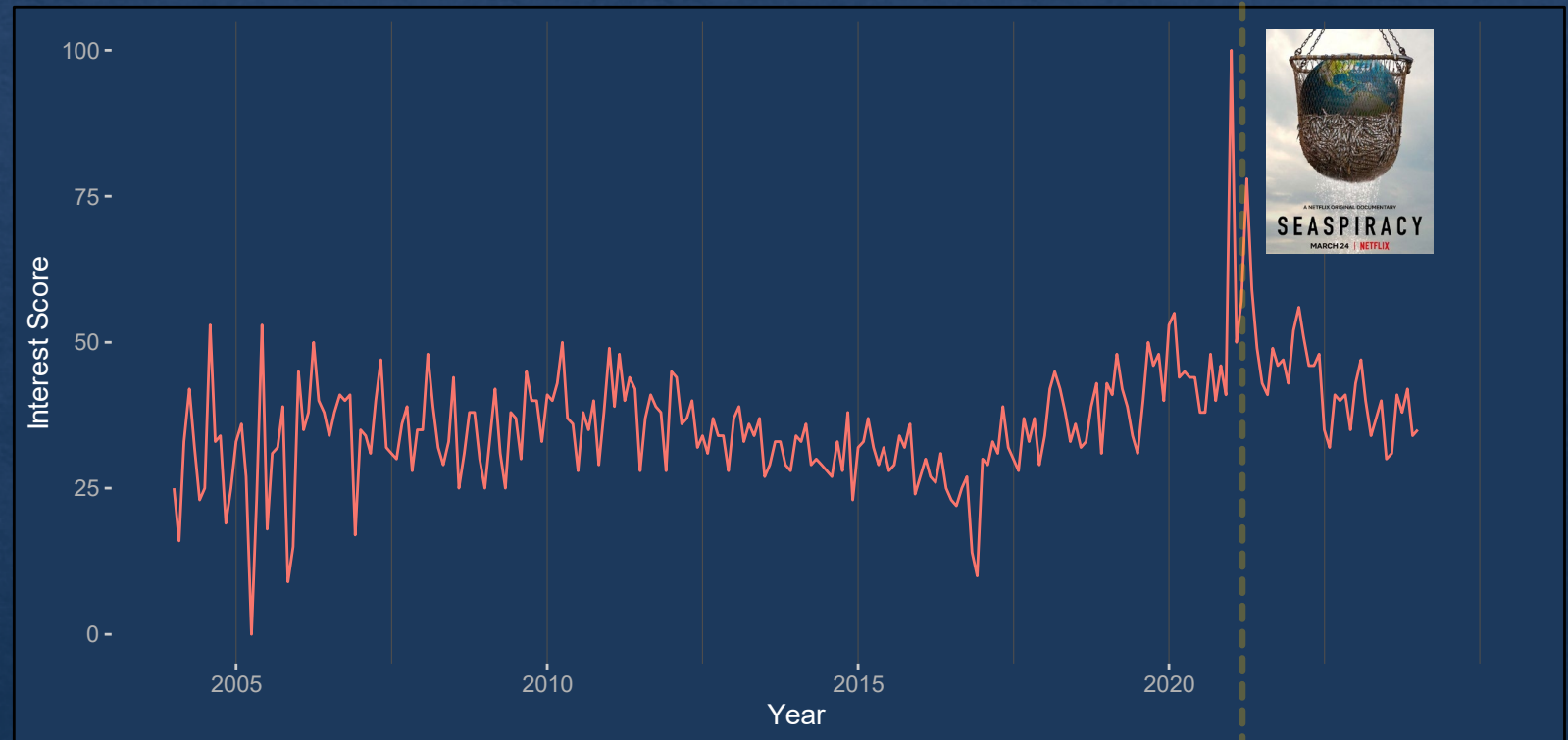
Consumers research sustainable fisheries about as often as Friend of the Sea, and about half as often as MSC.



The *Seaspiracy* media event preceded a dip in interest in MSC.

Interest in MSC has varied over time, but increased steadily from 2017 to 2022.

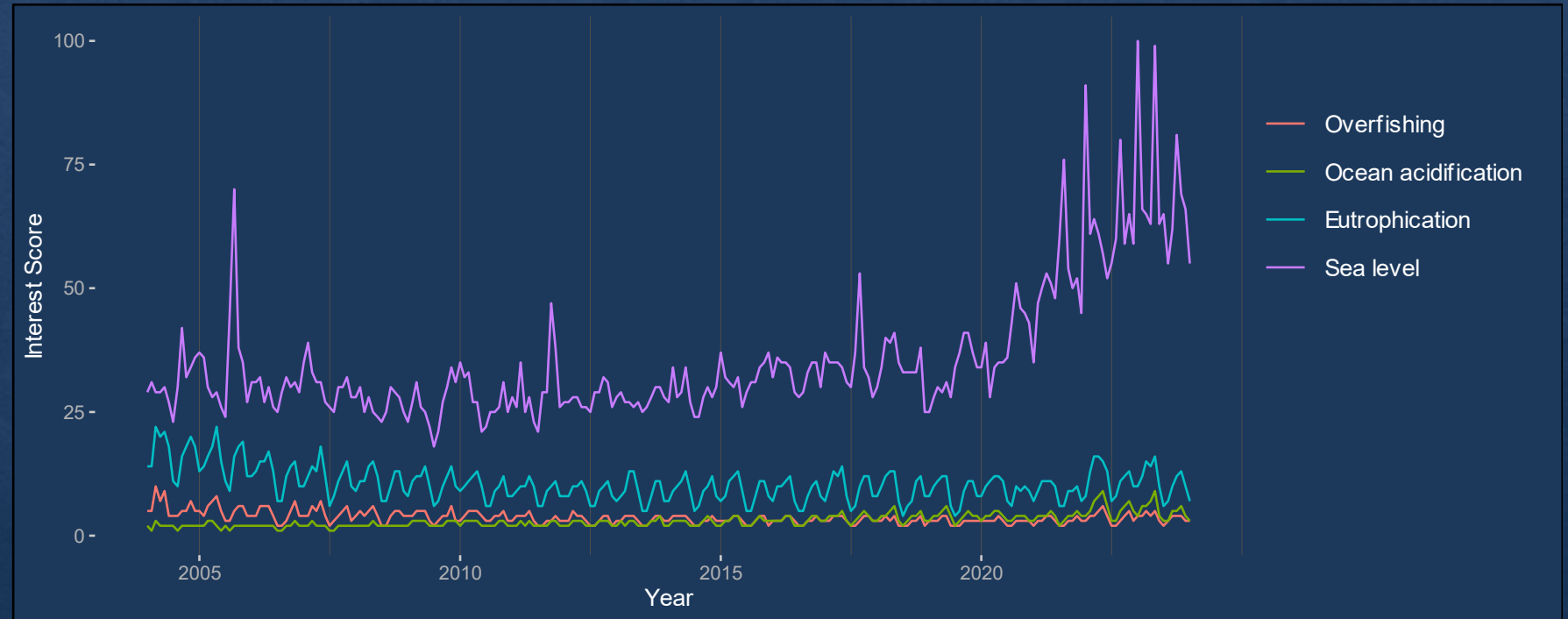
That trend has reversed steadily since early 2021 – the release date of the anti-fishing documentary *Seaspiracy* that commented on MSC's certification methods.



Consumer concerns about sea level are the highest among several ocean health subtopics.

Interest in rising sea levels occupies one of the top spots in terms of ocean health concerns.

The other categories flat, contracting, or growing very slowly compared to concern about sea levels.



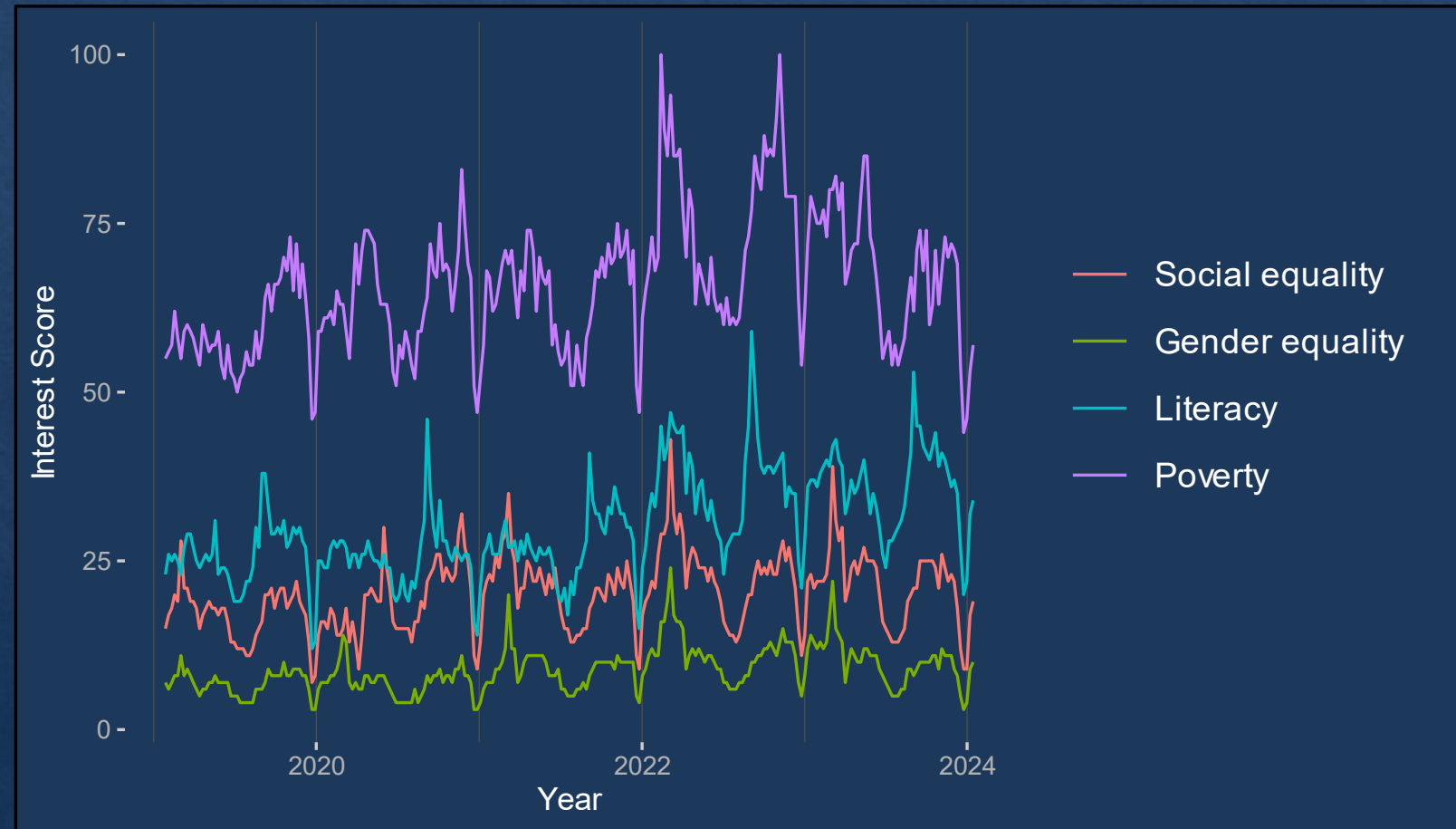
Global Search Trends, 2004-2024

Related to social issues, or the “S” in “ESG”

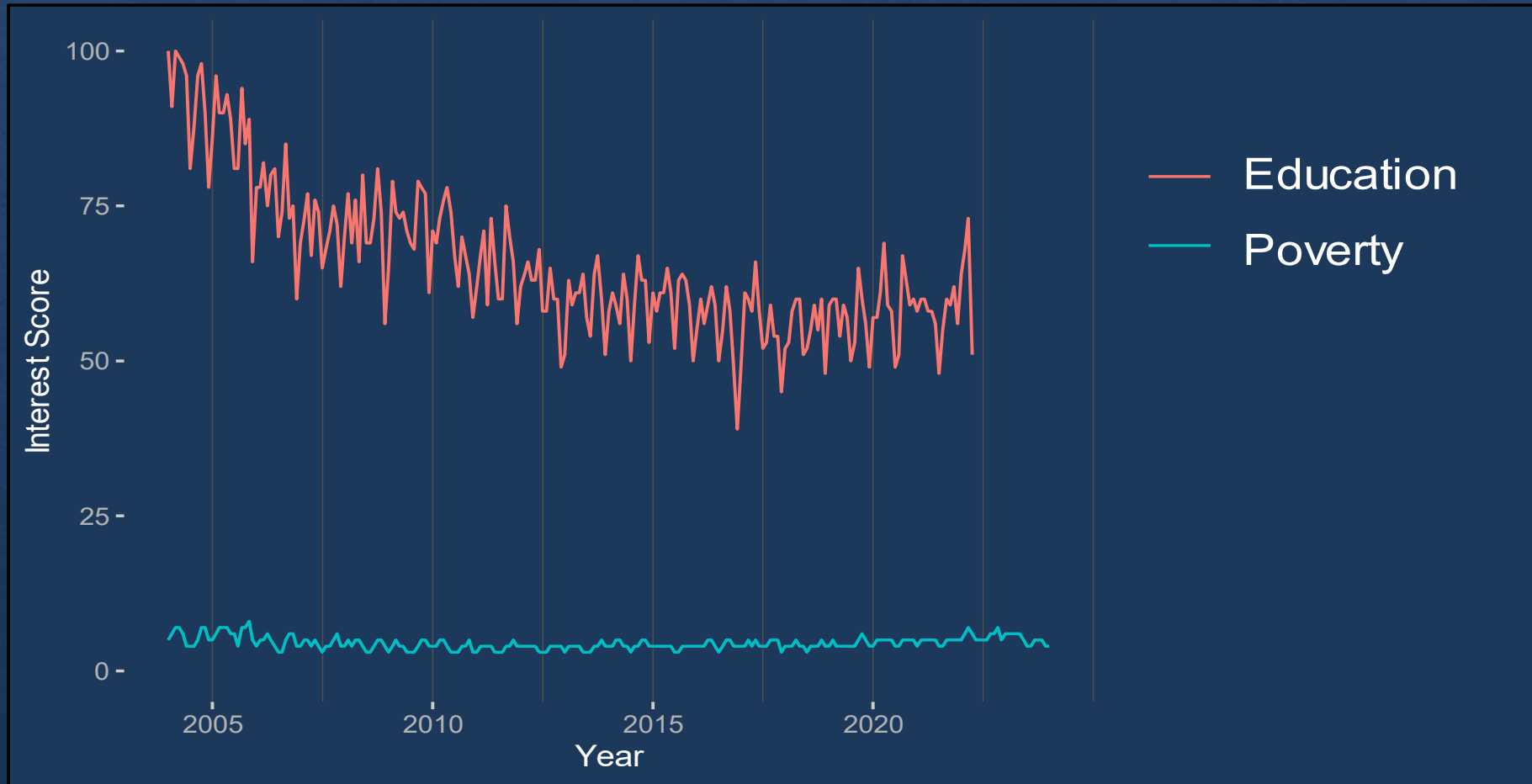
Several topics related to social outcomes of the UN SDGs show an uncertain trend.

Searches enquiring about social equality, gender equality, poverty and literacy all show uncertain trends.

Of these four, interest in poverty as a topic is the highest in gross terms.



Interest in education (the topic of UN SDG 4) has decreased since 2004, but still commands more interest than other social topics.



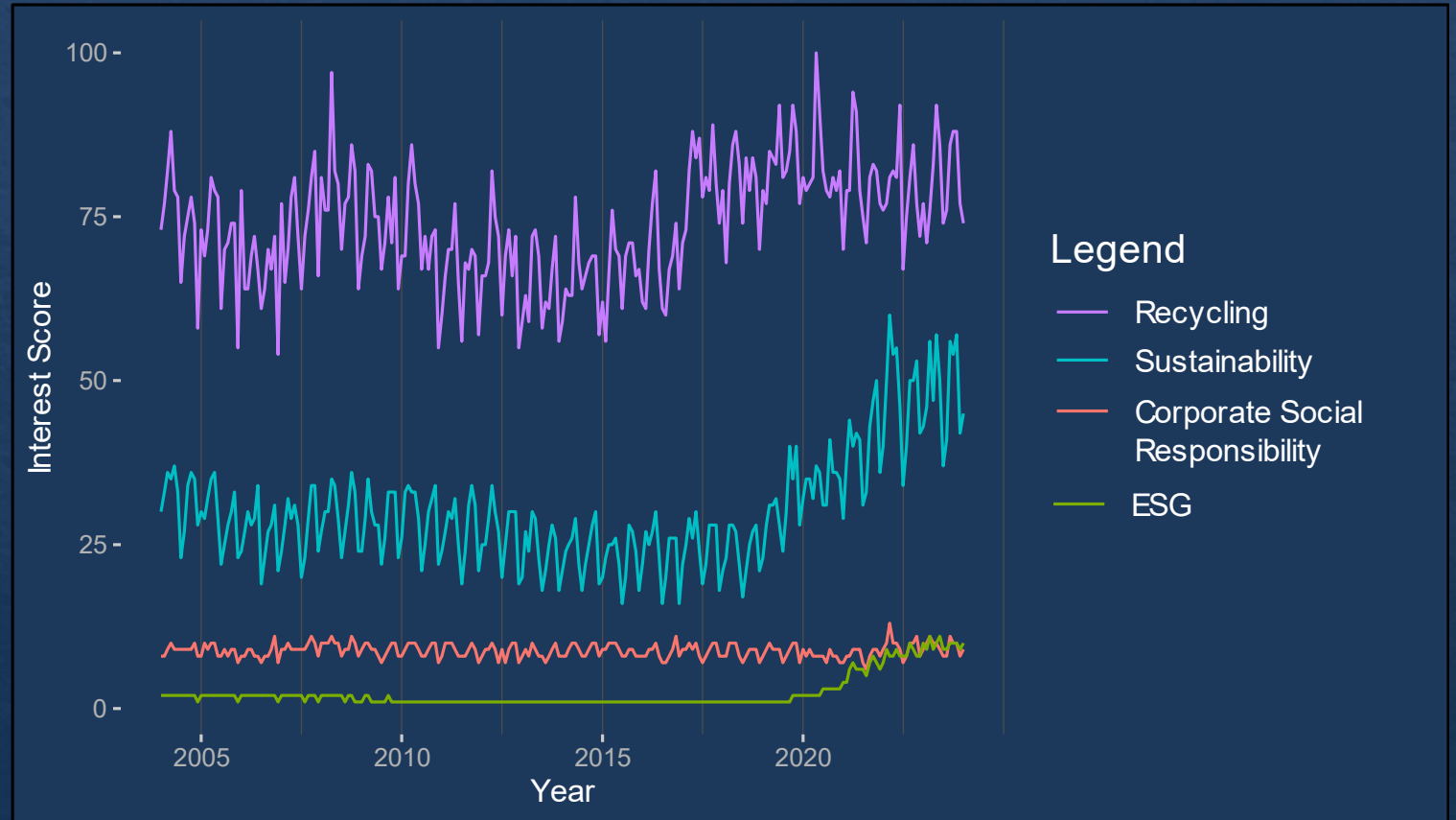
Global Search Trends, 2004-2024

Related to sustainable governance — the “G” in “ESG”

Interest in business-focused sustainability has increased in sync with the recent increased interest in general sustainability.

While interest in “corporate social responsibility” has stayed relatively flat since 2004, interest in “sustainability” and “environmental, social and corporate governance” (ESG) have increased apace.

Gross interest in sustainability and ESG is smaller than recycling (functioning here as something like a control group) but its growth has outpaced recycling for the past few years.



Consumer interest in three popular governance schemes varies.

There are dozens of sustainability schemes, but some observers are finding that these three are instigating or enabling sustainable governance among companies at especially high rates.

GRI commands the most search attention, but consumers have been researching it less often. Interest in the EU's CSRD is increasing quickly.



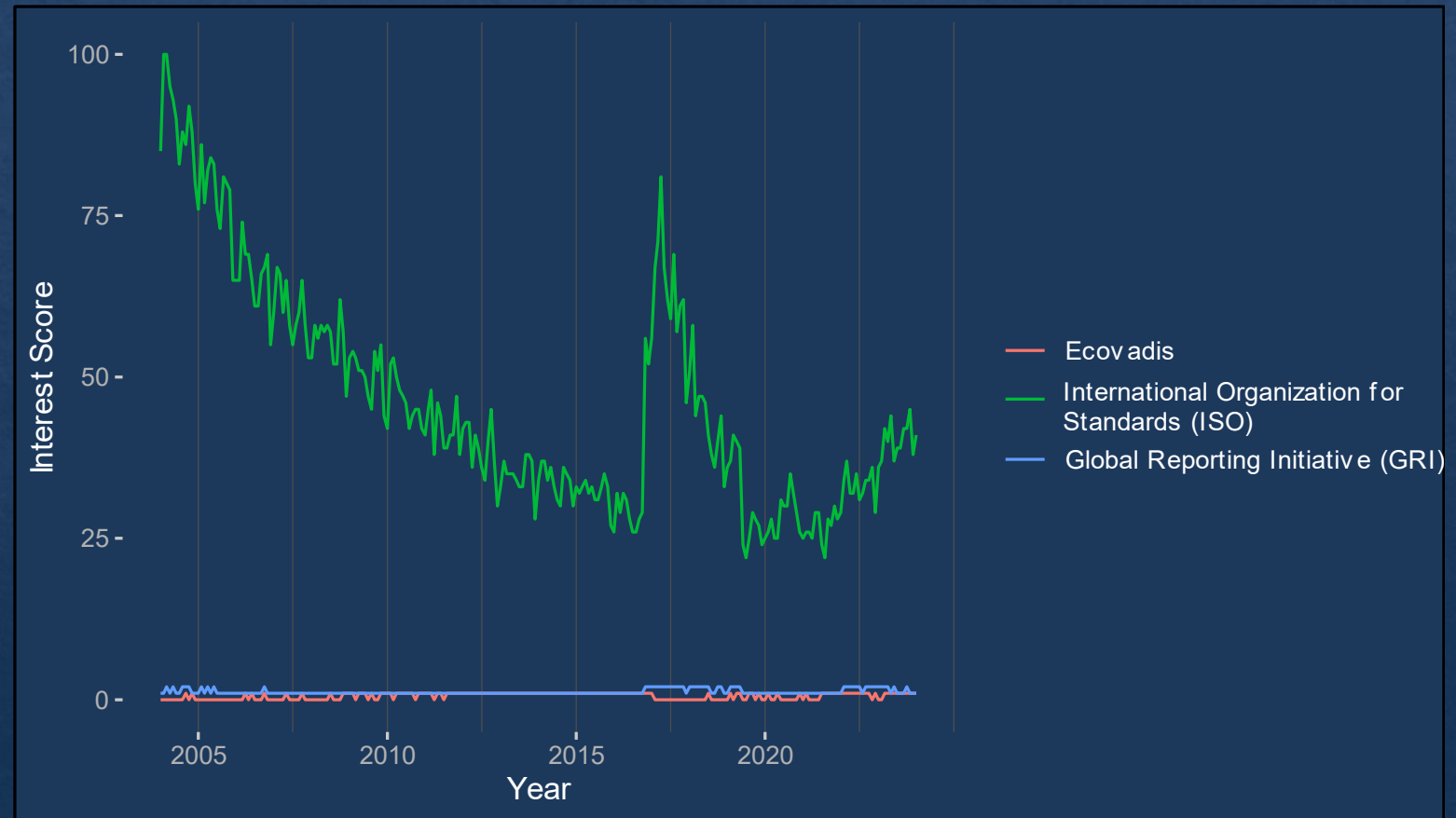
In 2021, GOED members claimed evaluations, certifications or affiliations related to these organizations in these proportions.



Data source: GOED Member Sustainability Survey 202111

Interest is significantly higher in ISO than in the other top governance schemes claimed by GOED members.

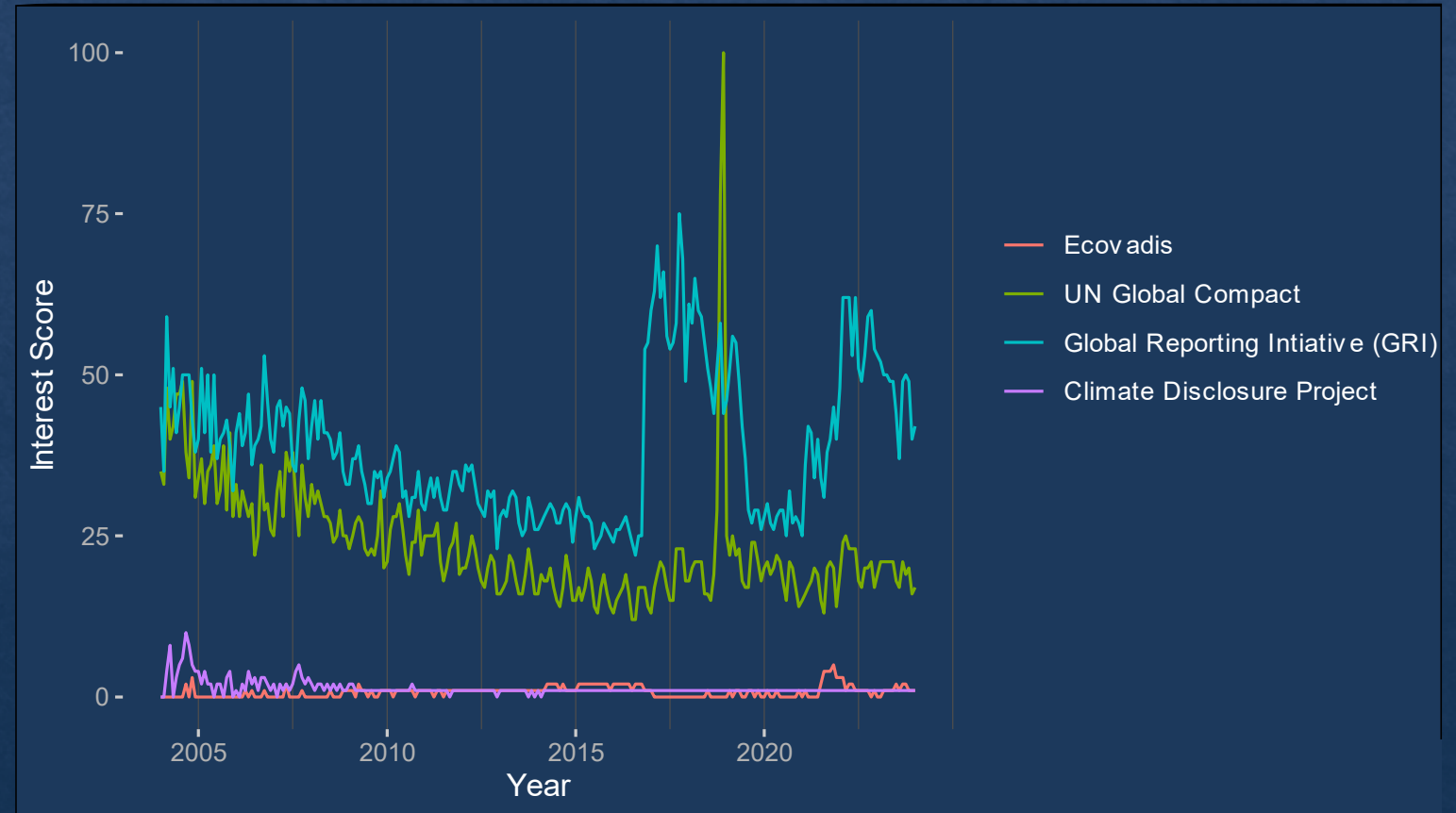
Nevertheless,
interest in ISO has
varied considerably,
and still draws less
interest today than
it did 20 years ago.



After ISO, other common governance schemes among GOED members are Ecovadis, the UN Global Compact, CDP, Sedex and GRI.

GRI commands the most generic interest among Google Users, followed by the UN Global Compact. Both now show an uncertain trend after years of a decreasing trend.

Note: Google Trends doesn't have a reliable "topic" to measure interest in Sedex, or the Supplier Ethical Data Exchange, possibly due to confusion with Brazil's courier service of the same name.



Final takeaways

1. Global consumers care about sustainability, but relatively few consumers surveyed by GOED are choosing not to use supplements due to sustainability concerns.
2. Generic interest in sustainability is increasing. The bulk of the interest may be inspired as much by policymakers, financiers, corporate leaders or NGOs as by organic interest by consumers.

GOED's Position

Members should thoughtfully measure the environmental and social impact of their operations and governance **in advance of** their customers beating down their doors about it.

If we learn that our work costs the biosphere and our communities more than it needs to, we establish and maintain credibility by being transparent about it and working together to make improvements.



Chris Gearheart

Director of Growth & Engagement

chris@goedomega3.com

Write me:

- To join GOED's Sustainability Committee
- To continue the conversation on this topic