

Aquaculture Stewardship Council



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Market development, ASC Nordics

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Aquaculture Stewardship Council
www.asc-aqua.org

Salmon, Norway



ASC is the programme owner and operates a global certification programme for responsibly farmed seafood

Currently 11 species specific standards

Non-profit organization founded in 2010 by WWF NL and Sustainable Trade Initiative (IDH)

To transform aquaculture towards **sustainability and social responsibility** using efficient market mechanisms

ASC's Theory of Change



Aquaculture is the fastest growing food production system globally



As the sector grows, so does its environmental and social **footprint**



ASC aims to transform aquaculture towards environmental sustainability and social responsibility creating value across the chain



These purchasing preferences **increase the demand** for responsibly farmed fish



When consumers buy **ASC certified fish**, they reward responsibly managed farms



Based on robust standards, the **ASC programme** aims to improve fish farming practices



Greater demand for responsibly farmed seafood **influences more farms** to be assessed against the ASC standards



The more farms that become certified, the greater the **environmental and social improvements**



ASC certified farms create less pressure on the environment and ensure social responsibility



ISEAL's three Codes of Good Practice provide a globally recognised framework, defining practices for effective and credible sustainability systems.

Those fully compliant with all three codes become an ISEAL member

ASC is full member as of 2015 – voluntarily scrutinized by peers

ISEAL Standard-setting Code

defines how a standard should be developed, structured and improved over time. The Code addresses multi-stakeholder consultation and decision-making, and ensures the standard contains clear requirements that can be measured and assessed.

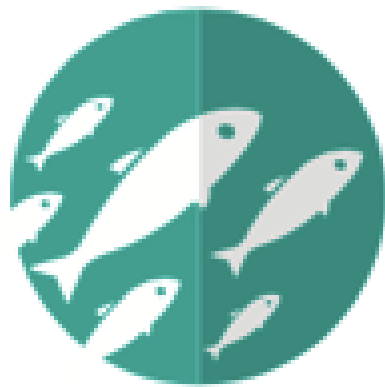
ISEAL Assurance Code

provides a framework for assessing compliance with standards, so that consumers, supply chain partners, investors and other stakeholders know they can trust the results of assessments. It encourages assurance that is rigorous and accessible, providing accurate and transparent results.

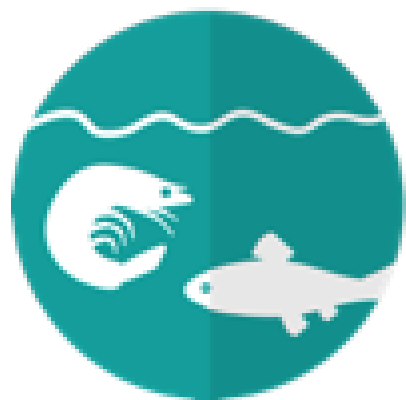
ISEAL Impacts Code

supports robust monitoring and evaluation that helps systems to understand how effective their standards are in achieving what they set out to do. It provides standards with a roadmap to measure progress against sustainability goals and to improve practices over time.

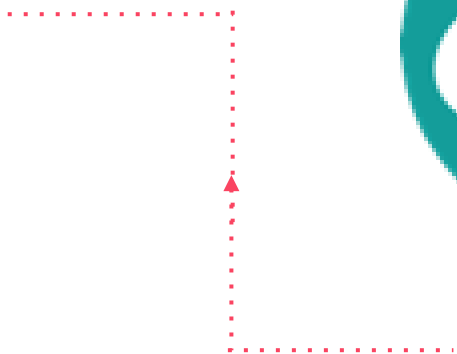
Farm



Hatchery

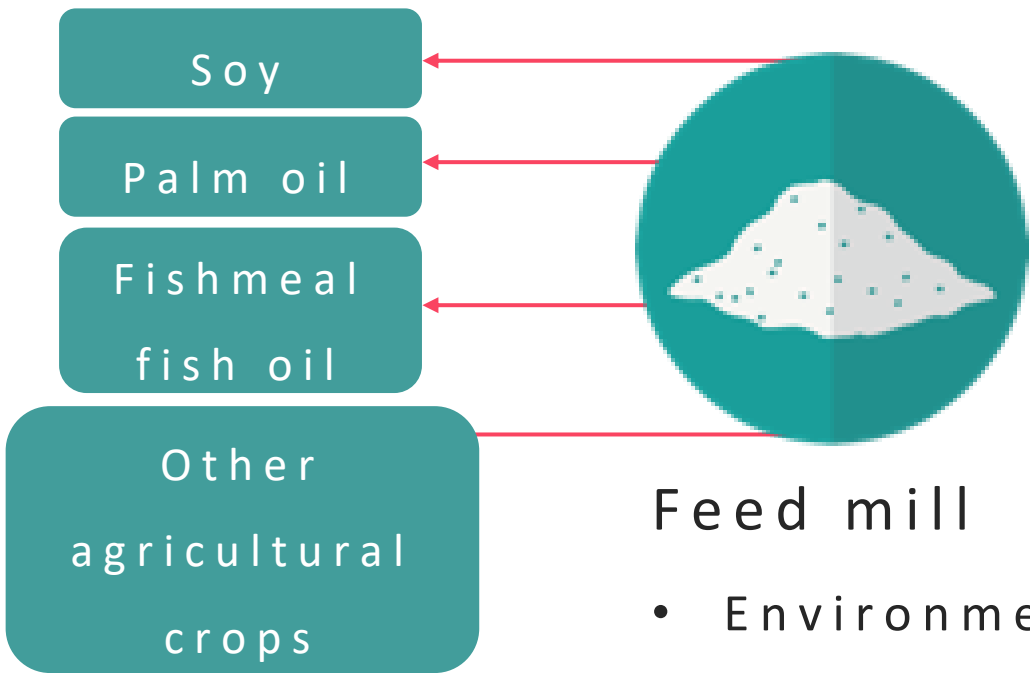


Farm



Farm Standards

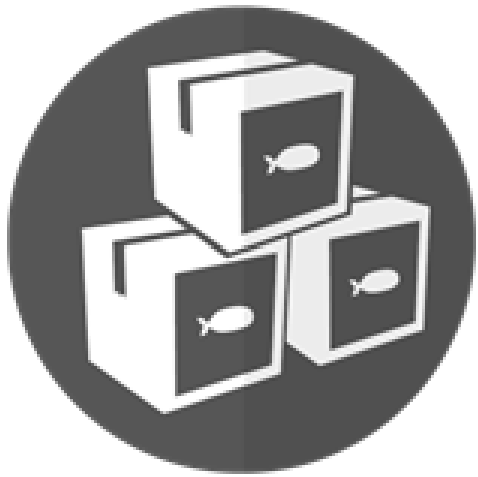
- Environment
- Social
- Animal health



Feed mill

- Environment
- Social

Traceability
(Chain of Custody)



Processor, packing, distribution

Retail/Foodservice etc

Chain of Custody

- Shared with MSC
- + Social
- +Food safety

ASC Farm standards

Environmental and social focus

Measurable and science-based indicators

Audits and issue of certificates done by independent and accredited third parties (called CABs)

All farm audit reports are publically available

Continuous improvements (3-5 years ISEAL)



**Mussels, oysters,
clams, scallops**



Trout



Salmon



Shrimp



**Flounder,
halibut, turbot**



Pangasius



**Sea bass, sea
bream, meagre**



Tilapia



Abalone



Seriola, cobia



**Grouper, snapper,
barramundi,
pompano, croaker**



Seaweed

Chain of Custody

To ensure ASC certified products traded in the value chain originates from an ASC certified farm, all actors in the supply chain must be Chain of Custody Certified

3 versions depending on the operations

Default

Group

Consumer Facing Operations (CFO)

5 Principles

- Certified products are purchased from certified suppliers
- Certified products are identifiable
- Certified products are segregated
- Certified products are traceable and volumes are registered
- There is a management system in place



ASC Global Consumer Survey

Aquaculture Stewardship Council
www.asc-aqua.org

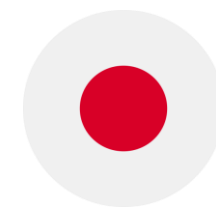


ASC Seafood, Global production

Global consumer survey 2021/2022

12 countries

12000 respondents



Sustainability is an important topic for the majority of consumers who care about a responsible seafood industry

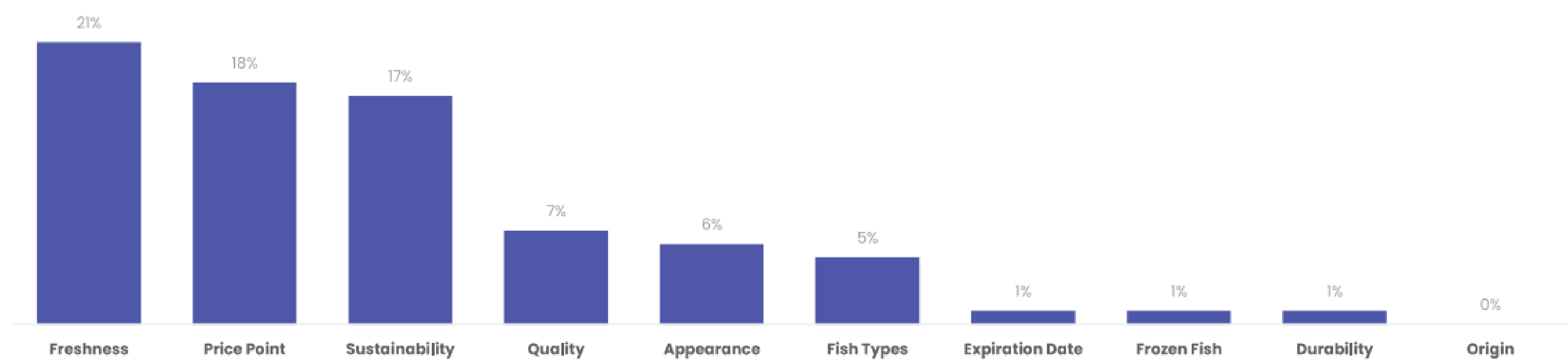
Claims regarding sustainability	NL	BE	GE	FR	UK	SP	IT	CAN	US	CH	JA	AUS
Buying fish and seafood from sustainable and responsible sources has a positive effect on the oceans.	65%	69%	73%	70%	74%	81%	75%	74%	72%	81%	61%	79%
I care about the impact that seafood industry can have on the environment	62%	61%	64%	70%	77%	78%	78%	76%	70%	80%	66%	73%
I care about the welfare of the fish we eat.	64%	56%	69%	67%	76%	71%	78%	72%	70%	69%	70%	64%
I believe workers in the seafood industry are treated fairly.	30%	27%	24%	31%	30%	19%	35%	29%	44%	64%	22%	39%
When buying fish and seafood the topic of sustainability and responsibility is not important for me.	26%	24%	25%	25%	27%	25%	23%	23%	36%	35%	14%	25%

- > 65% to 80% believes that buying sustainable fish has a positive effect on the oceans
- > 60% to 80% cares about the welfare of the fish
- > 30% believes workers in the seafood are treated fairly
- > 25% says that sustainability is *not important* when buying seafood

Prompted: more than 50% of consumers agree they specifically look for sustainably sources seafood

	NL	BE	GE	FR	UK	SP	IT	CAN	US	CH	JA	AUS
When buying fish and seafood, I specifically look and ask for seafood that is sustainably sourced.	36%	41%	54%	57%	57%	52%	48%	49%	52%	73%	25%	49%

Purchase drivers – unprompted: 17% stated sustainability when looking for seafood

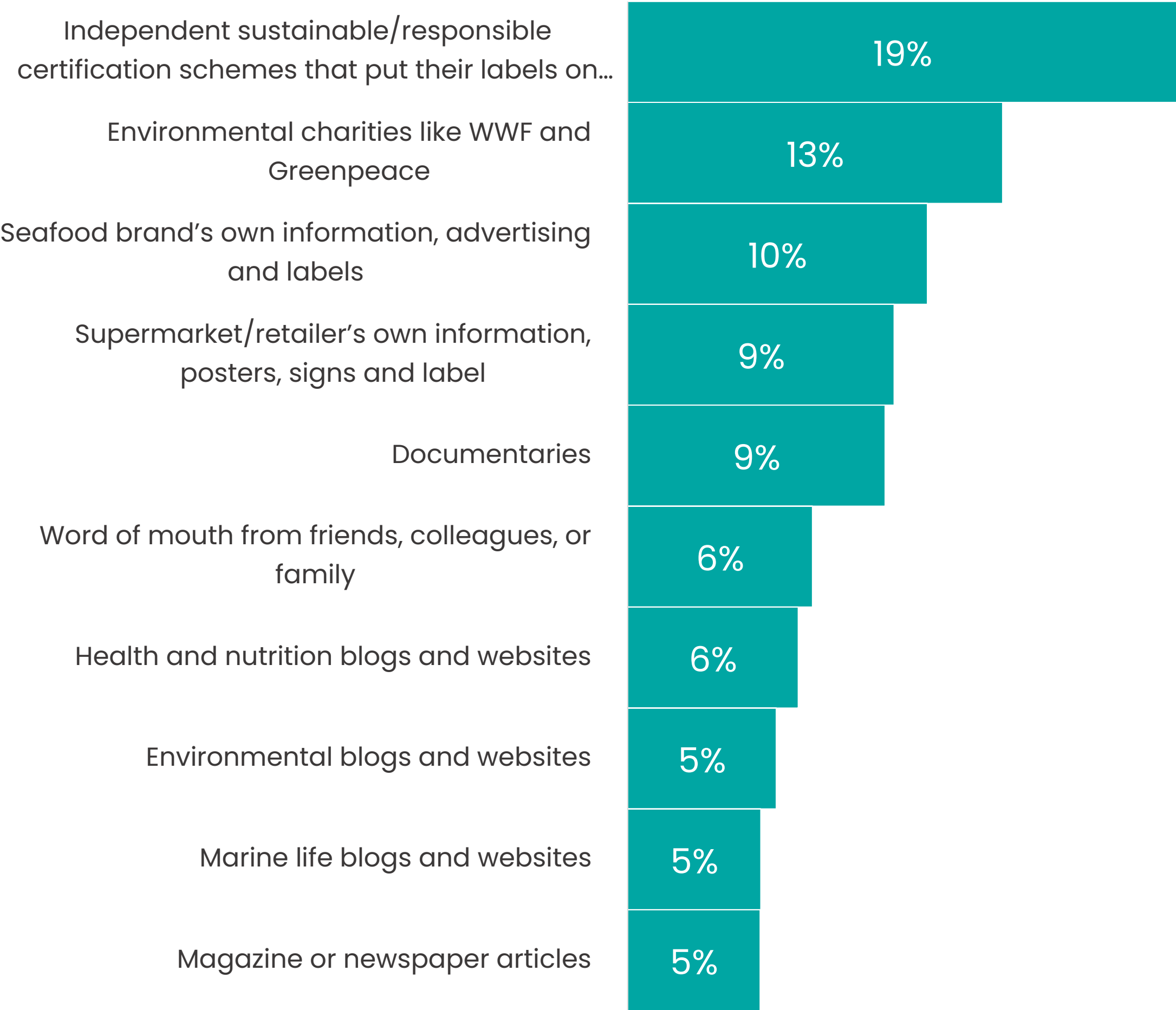


Thinking about buying fish or seafood from, What do you consider or look for when buying fish or seafood at this supermarket?

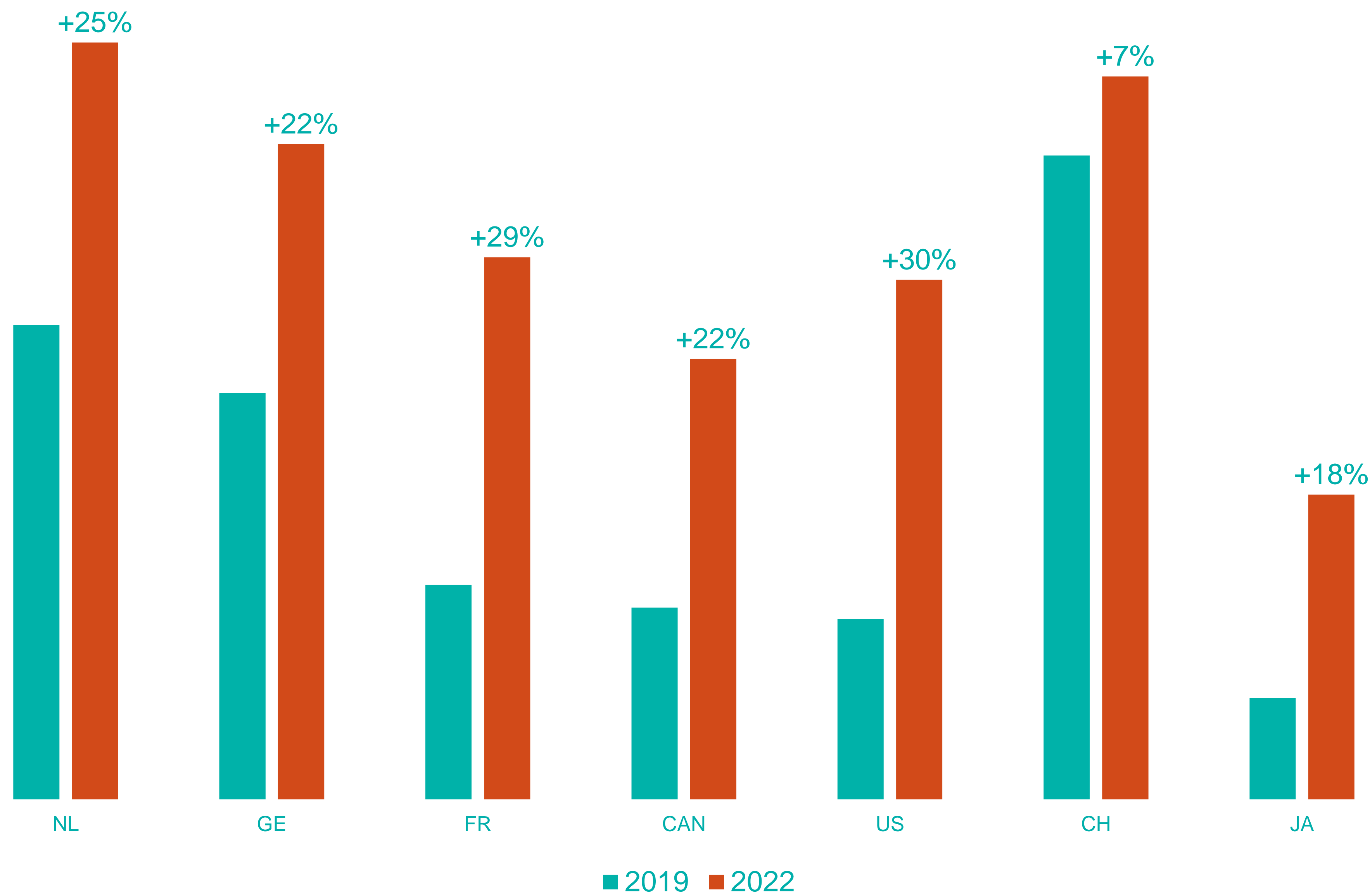
Next to freshness and price, sustainability is one of the top three elements to look for when buying fish and seafood in the supermarket.

Highest level of trust for independent certification schemes that put their labels on seafood packaging

Sources of seafood information that have the highest level of trust



Global consumer recognition of the ASC label



In summary

Sustainability an important topic for seafood consumers

- 65% to 80% believes that buying sustainable fish has a positive effect on the oceans
- More than 50% of consumers agree they specifically look for sustainably sourced seafood
- Sustainability one of top three purchasing drivers



Independent certification schemes that put the logo on pack has the highest level of trust

Global consumer awareness of ASC logo is increasing

Brief outlook

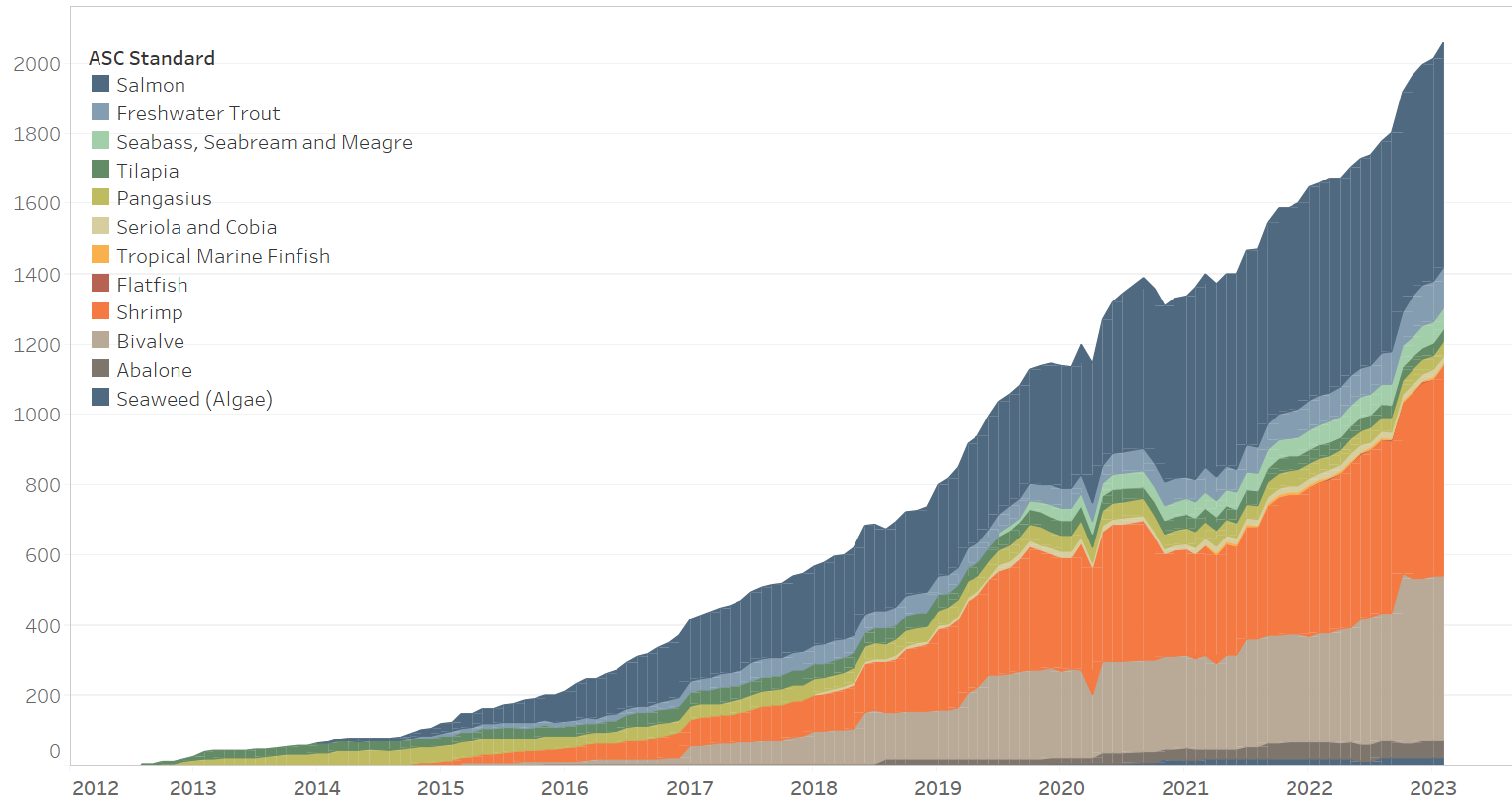
Aquaculture Stewardship Council
www.asc-aqua.org



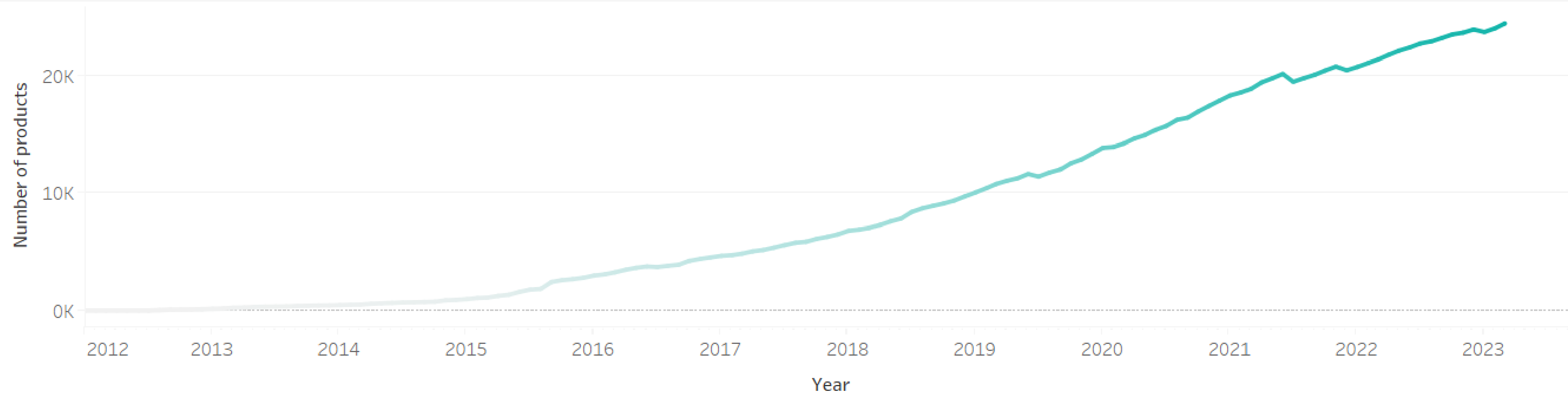
Seabream, Croatia

ASC CERTIFIED FARM SITES - STANDARD SPECIFIC

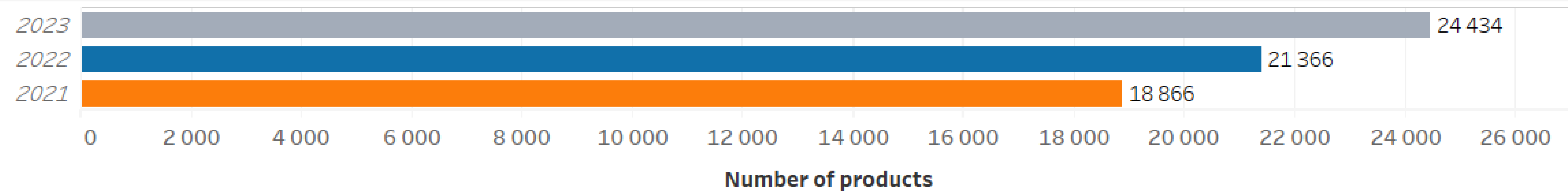
ASC Standard
All



ASC labelled products - global over time



ASC labelled products - global (mars 2021 to mars 2023)



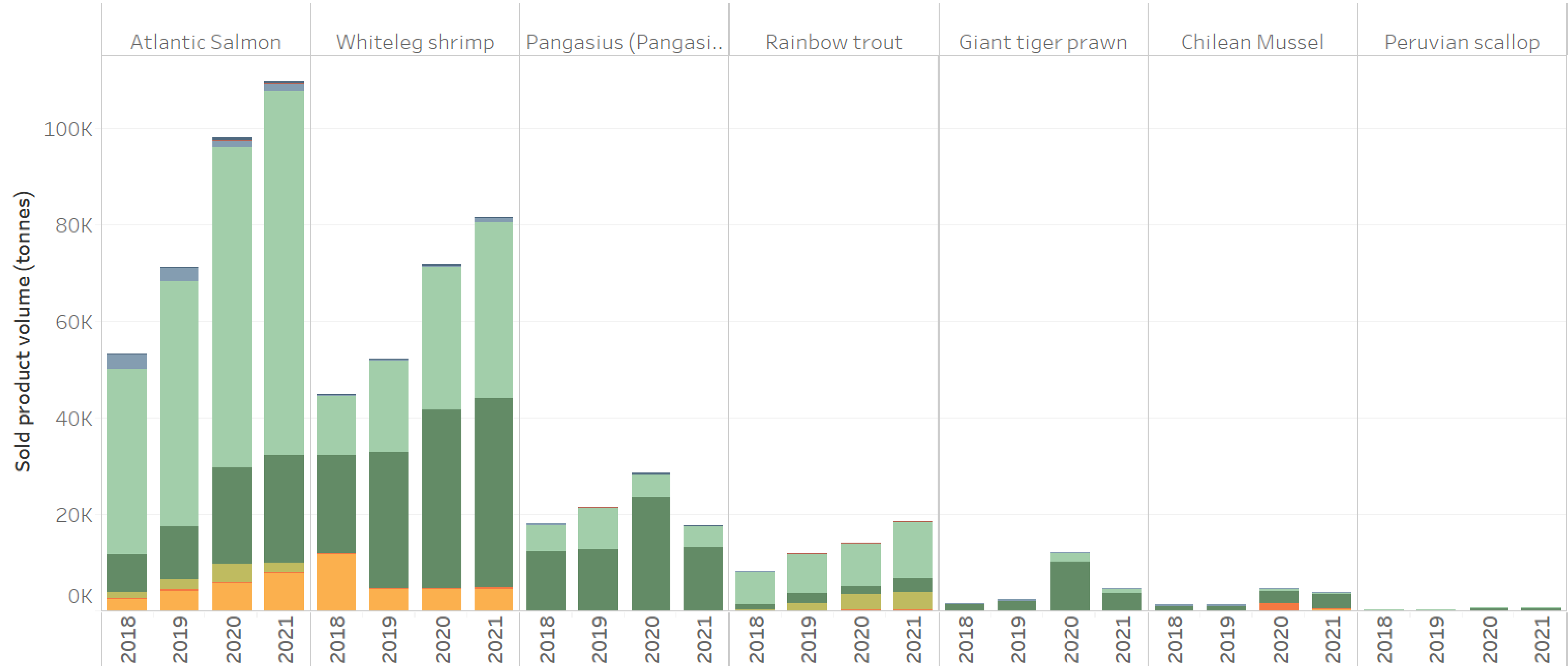
SOLD ASC PRODUCT VOLUME - COUNTRY & SPECIES SPECIFIC

Allocation coun..All

Year
Multiple values

Sold product volume by species

Species
Multiple values



Product Sub-Category (group)

- Null

Fish Oils/Supplements

Foodservice
- Fresh

Frozen

Pet Food
- Preserved

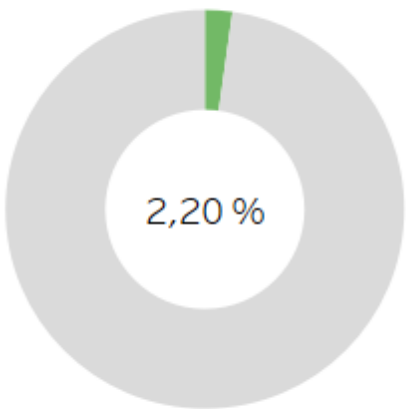
Transformed

FAO data
2020

ASC data
2023-03-01

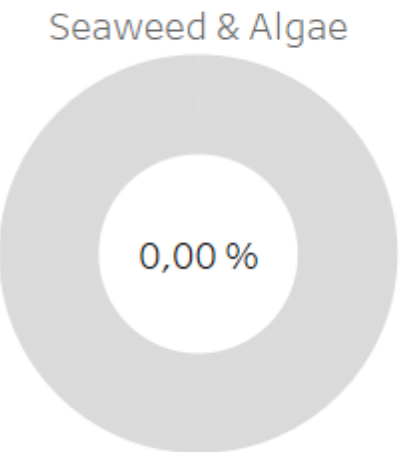
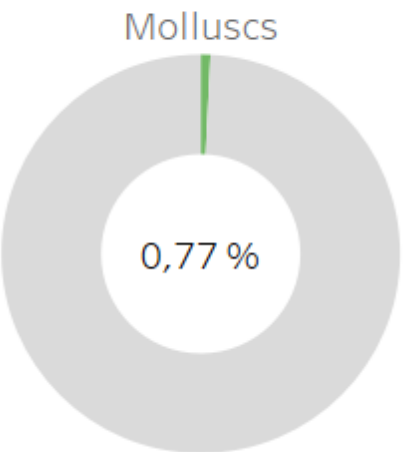
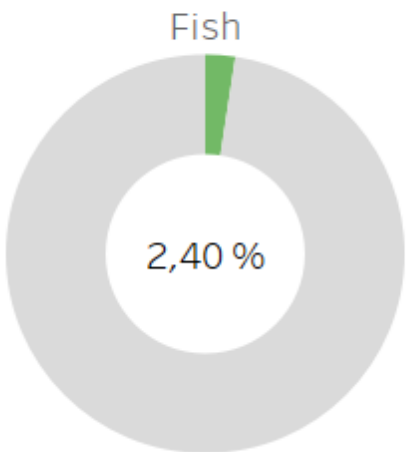
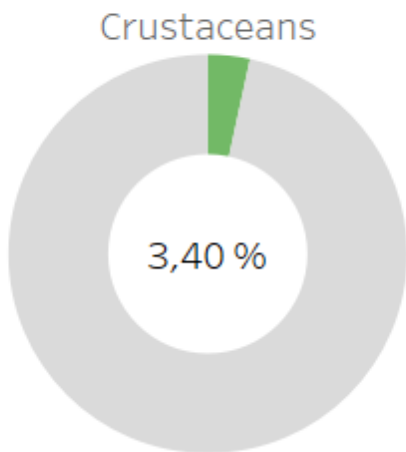
Legend
■ % of global production volume ASC certified
■ % of global production volume not ASC certified

Global aquaculture production volume (FAO) with **ASC certification** - total



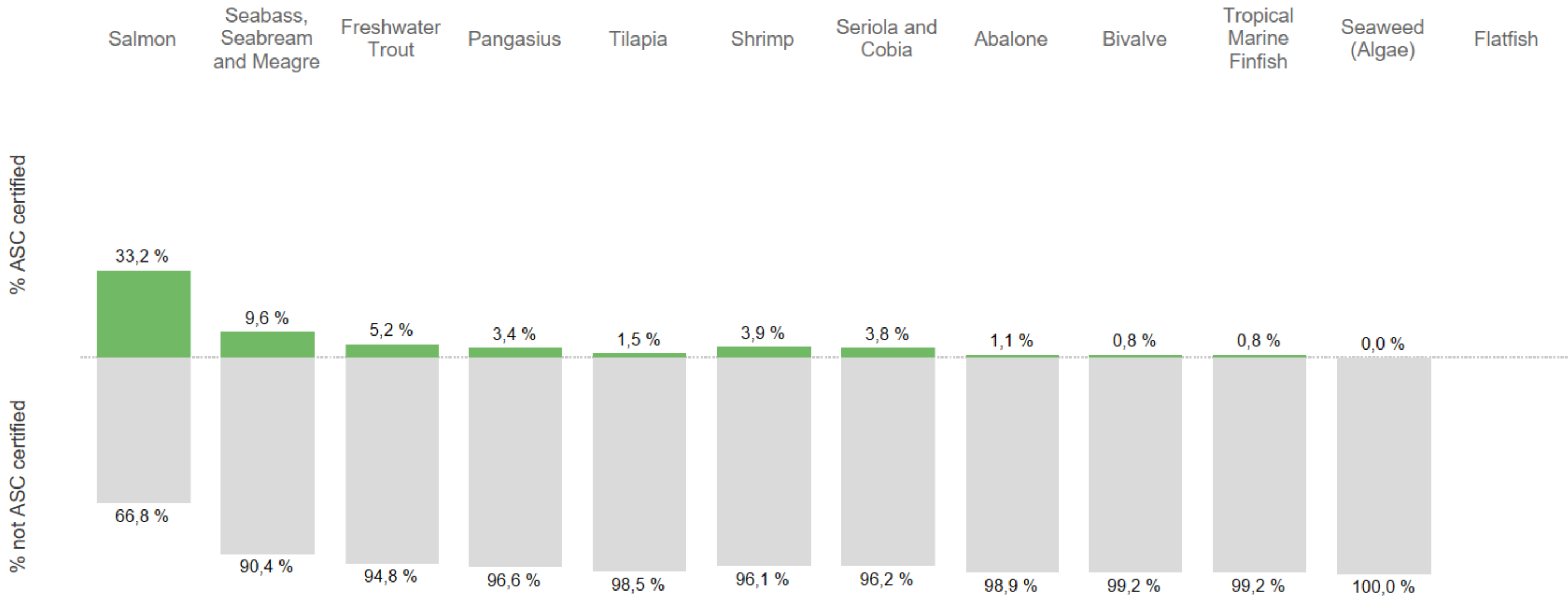
ASC certified production volume (t/year)	1 899 520
Global production volume (t/year)	86 438 230
Global production ASC certified	2,20%

Global aquaculture production volume (FAO) with **ASC certification** - by major species group



Allocated Species Groups	ASC certified production volume (t/year)	Global production volume (t/year)	Global production ASC certified
Crustaceans	381 650	11 236 967	3,40%
Fish	1 380 533	57 460 783	2,40%
Molluscs	137 337	17 740 480	0,77%
Seaweed & Algae	387	34 477 574	0,00%
Grand Total	1 899 907	120 915 804	1,57%

Global aquaculture production volume (FAO) with **ASC certification** - by ASC Standard

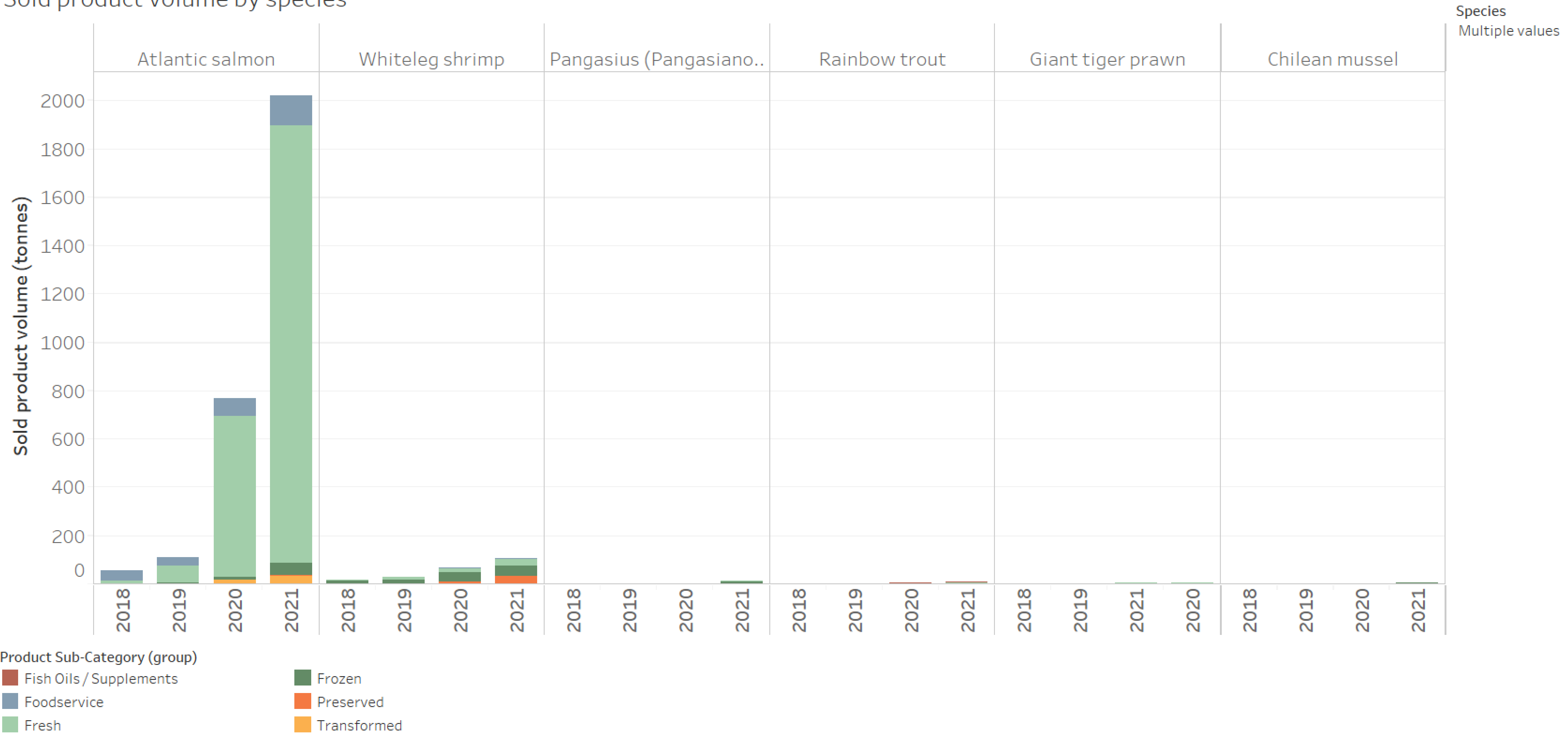


SOLD ASC PRODUCT VOLUME - COUNTRY & SPECIES SPECIFIC

Allocation coun..
Finland

Year
Multiple values

Sold product volume by species



ASC Certification Process

Aquaculture Stewardship Council
www.asc-aqua.org



Shrimp, Thailand

ASC Farm Certification Process

Valid from 2017





ASC Tilapia Standard
Version 1.2



Recirculating Aquaculture Systems (RAS) Module



Contact Information:
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Daalseplein 101, 3511 SX Utrecht,
The Netherlands

+31 30 239 31 10
www.asc-aqua.org

- ASC Species Standard
- RAS Module
- ASC Chain of Custody Standard
- Audit Manual



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Daalseplein 101, 3511 SX Utrecht,
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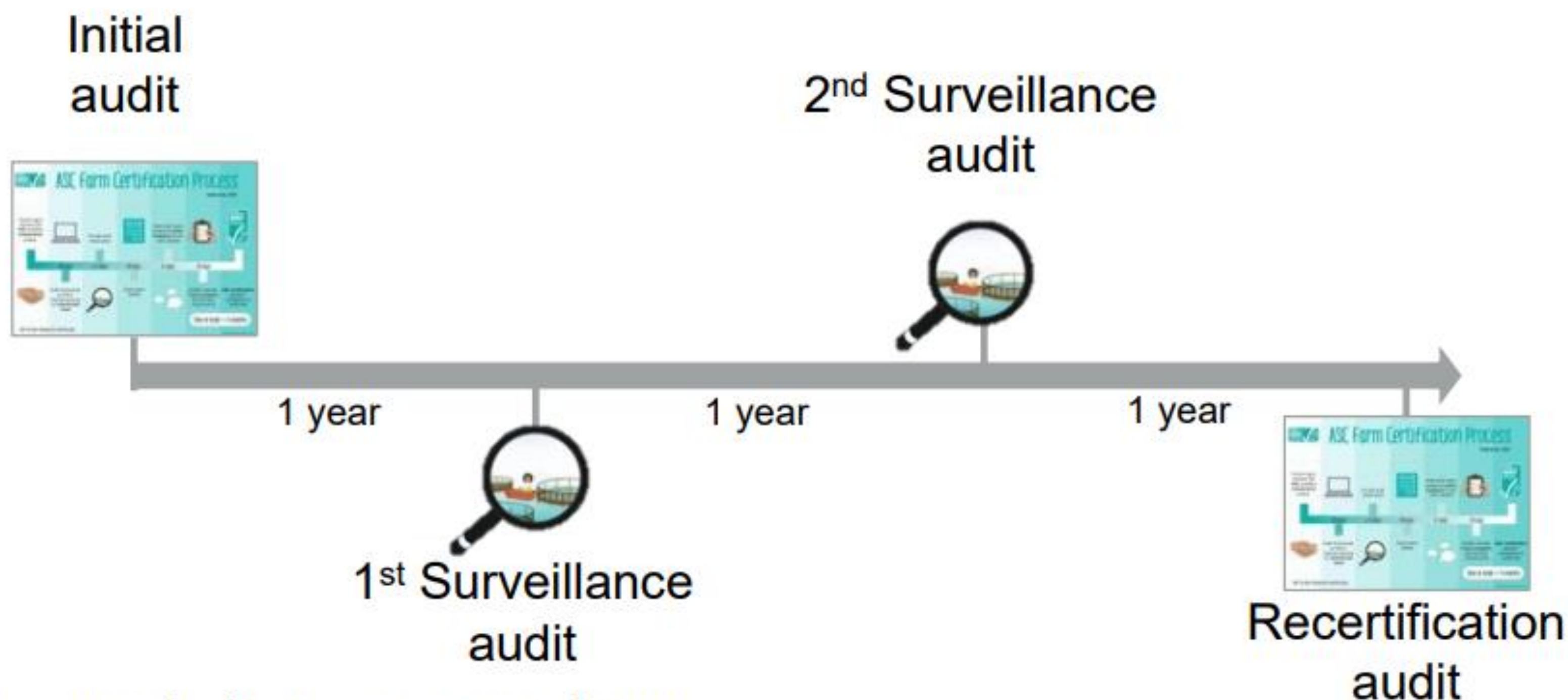
+31 30 239 31 10
www.asc-aqua.org

- Requirements for Unit of Certification (RUoC)
- Certification and Accreditation Requirement (CAR)



ASC logo user guide

Farm Surveillance & Monitoring



- All performance indicators are mandatory
- Entirely independent from ASC (audits done by third party auditing company)
- All farm audit reports are publicly available on ASC website: asc-aqua.org
- Stakeholder consultation during assessments

1. Study Documents

- Species Standard
- CoC Standard
- RAS Module (if applicable)
- ASC CoC Module

3. Farm Audit

- Audit preparation (Checklist)
- Includes input from stakeholders and audit findings
- CoC Audit

5. Stakeholder input

- Stakeholder have 15 days to submit input.
- CAB reviews and responds to stakeholder comments (where needed)

2.Contract a CAB

- ASI Website
- Quotation Process is recommended

4. Draft Audit Report

- Within 30 days
- Publically available

6 Certification Decision

- CAB take certification decision, factoring in all audit findings, incl. Stakeholder comments.
- Certificate issued if farm found to be in compliance

Audit findings

Certification Decision and non-conformities

Certification decision

- CAB shall make a certification decision within 6 months from the date of the audit closing meeting
- The CAB shall **not** grant a positive certification decision if there is:
 - a) An open major or critical non-conformity
 - b) Any open and not extended minor non-conformity
 - c) An open variance request
 - d) Without complete end of production cycle data required by applicable standard for sites running its very first production cycle.

Types of non-conformities

- **Minor non-conformity (18.4 CAR)**

The CAB shall classify an initial audit as failed if minor non-conformities are not closed or extended (maximum 12 months) within three (3) months from the date of detection.

- **Major non-conformity (18.5 CAR)**

The CAB shall classify an initial audit as a failed audit if major non-conformities are not closed within three (3) months from the Detection Date.

- **Critical non- conformity (18.6 CAR)**

The CAB shall raise a critical non-conformity when either:

- a) Employees' lives are evidently at risk.
 - b) A banned substance or veterinary medicine not allowed to be used by the applicable ASC standard was detected in samples taken by the ASC, ASC designated agent, ASC appointed accreditation body or the CAB
- ASC Certification and Accreditation Requirements (CAR) v 2.3 - July 2022 42
- c) Sales of non-ASC products as ASC certified.

The CAB shall require that critical non-conformities raised at initial audits shall be satisfactorily addressed by the Client:

- a) Prior to certification being granted
- b) Within three (3) months of the Detection Date or a full re-audit shall be required.

Variance Request (VR) and Public Consultation

VR0537

Refers to P levels in the Baltic Sea

ASC Trout Standard sets a maximum of 20 ug/l

VR0537 allow baseline studies set to the natural existing Phosphorous levels in this water body and the farm sites will be measured against this.

<https://www.asc-aqua.org/what-you-can-do/get-certified/variance-request-interpretation-platform/>

QA0115

Applicability of Standards.

farms producing salmonids (trout and salmon) and sited in coastal conditions of Finland, shall apply the ASC Freshwater Trout Standard.

Public Consultation

According to ISEAL and Best Practice

ASC Standards and related documents are subject to Public Consultation

Currently a PC is running on

ASC Farm Standard Criterion 2.7 Water Quality

<https://www.asc-aqua.org/programme-improvements/aligned-standard/>

Farm Standard Criterion 2.14c Fish Health and Welfare – slaughter (auditability)

Farm Standard Criterion 2.14x Eye stalk ablation – proposal for indicator

<https://www.asc-aqua.org/programme-improvements/fish-welfare/>

Species Extension Project: Pike-perch Module (*Sander lucioperca*, in RAS and pond systems)

<https://www.asc-aqua.org/programme-improvements/species-extension-project-pike-perch/>

Chain of Custody

To ensure ASC certified products traded in the value chain originates from an ASC certified farm, all actors in the supply chain must be Chain of Custody Certified

If needed, can be combined with Farm audit

If a producer also have processing, CoC might be needed

- CAB decision if applicable, based on risk
 - Is all volume certified?
 - Fish from external farms processed?
 - Transportations between farms/processing



What happens next?

When Certificate is issued, ASC and MSCl will be notified

If you intend putting the logo on packaging:

- Sign Logo License Agreement (managed by MSCl on ASC behalf)
- Follow ASC logo user guide. All logo use must be pre-approved
- Submit turnover declaration for calculating royalty fee

start at 0.5 % **of net wholesale value of seafood sales with the ASC logo.**

- ASC-labelled sales (GBP) of consumer facing products

	Royalty rate
£0 – 10,000,000 GBP	0.5%
£10,000,001 – 20,000,000 GBP	0.45%
£20,000,001 – 30,000,000 GBP	0.4%
£30,000,001 – 40,000,000 GBP	0.35%
40,000,001 GBP and greater	0.3%

Useful links

ASC Farm Standards incl. RAS Module and Trout Audit Preparation Checklist

<https://www.asc-aqua.org/what-we-do/our-standards/farm-standards/>

https://www.asc-aqua.org/wp-content/uploads/2019/12/ASC_Audit-Preparation-Checklist_Trout_v1.2.xlsx

ASI CAB search

<https://www.asi-assurance.org/s/find-a-cab>

Chain of Custody Standard incl. ASC CoC Module

<https://www.asc-aqua.org/what-we-do/our-standards/traceability/>

<https://www.msc.org/for-business/certification-bodies/chain-of-custody-program-documents>

Quick start guide, CAR & RUoC, ASC Vocabulary Platform

<https://www.asc-aqua.org/what-you-can-do/get-certified/farms/>

<https://data.asc-aqua.org/asc-vocabulary/>

https://www.asc-aqua.org/wp-content/uploads/2023/02/ASC-Get-Certified-Guide_Single-site-certification.pdf

ASC Logo user guide

<https://www.asc-aqua.org/what-we-do/our-logo/logo-user-guide/>

ASC Global Producer Outreach Manager

marcos.moya@asc-aqua.org

News Updates Developments





Alignment

What does it mean?

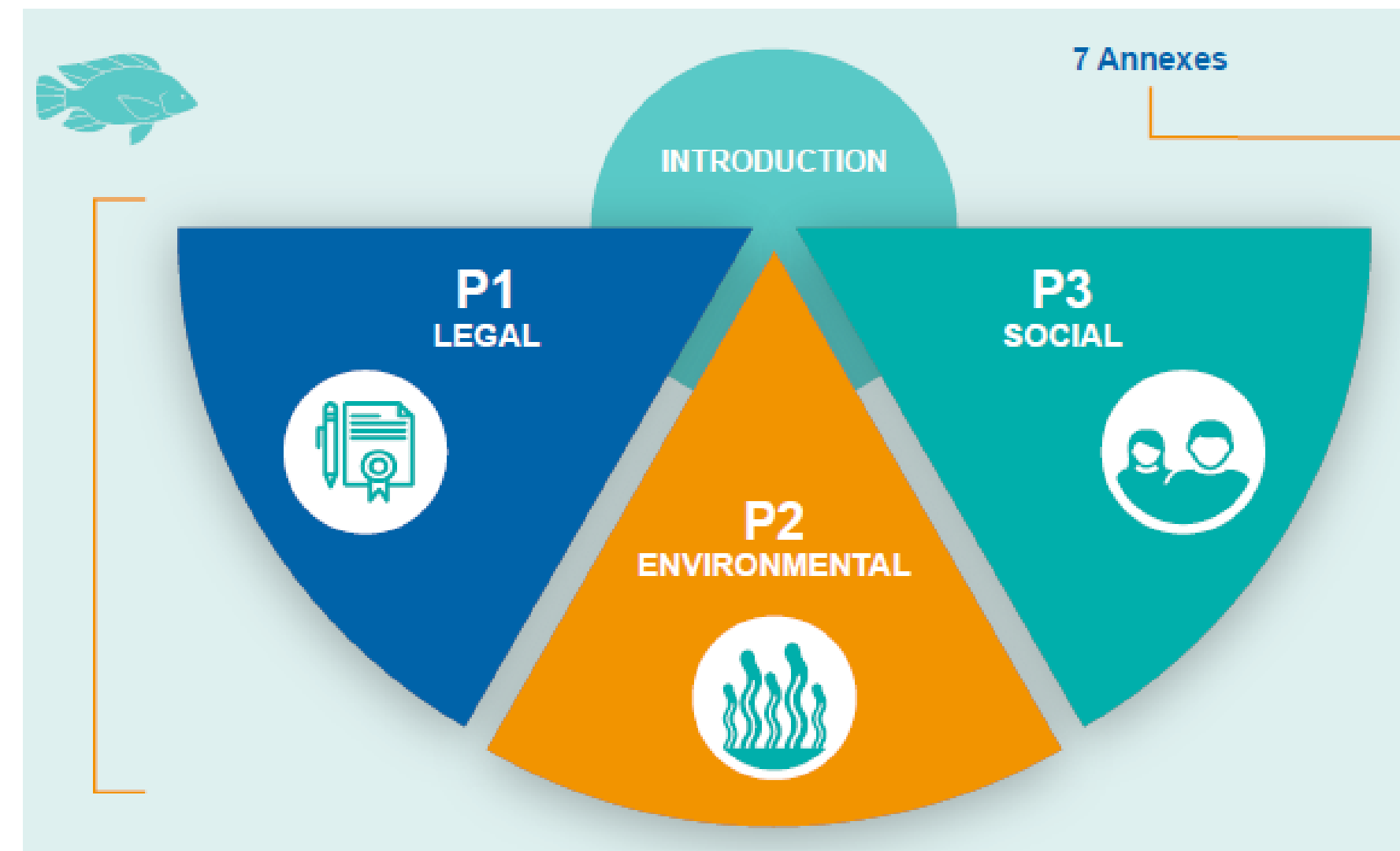
Consolidate existing 11 species standards to one ASC Farm Standard



Species Specific Indicators will still be part of the Standard (annex 1)

Will facilitate introduction of new species and new production systems

3 Principles och 7 annexes



1. Species Performance Levels
2. Data Recording and Submission
3. Risk Management Framework
4. Labour Requirements
5. List of acronyms and definitions
6. Soil permeability
7. Sampling methodology for copper

P1 : LEGAL

-  1.1 Legal compliance
-  1.2 Managemeny system
-  1.3 Business Ethics
-  1.4 Traceability and transparent disclosure

P2 : ENVIRONMENTAL

-  2.2 Ecologically important habitats
-  2.3 Minimise wildlife interactions
-  2.4 Avoid culture of non-native species
-  2.5 Escapes
-  2.6 Benthic impacts
-  2.7 Water Quality
-  2.8 Salinisation
-  2.9 Biosolids
-  2.10 Freshwater use
-  2.11 Energy use and GHG emission
-  2.12 Material use, Waste and pollution control
-  2.13 Feed
-  2.14 Fish health and welfare
-  2.15 Parasite control
-  2.16 Antibiotics and other veterinary therapeutants
-  2.17 Hatcheries and other intermediate sites
-  2.18 Area Based Management (ABM)

P3 : SOCIAL

-  3.1 Rights Awareness
-  3.2 Forced, bonded, compulsory and human trafficking
-  3.3 Child labour
-  3.4 Discrimination
-  3.5 Health and Safety
-  3.6 Collective bargaining and freedom of association
-  3.7 Transparent contracts
-  3.8 Wages
-  3.9 Working hours
-  3.10 Workplace conduct response
-  3.11 Employee accommodation
-  3.12 Grievance mechanism
-  3.13 Community engagement

Alignment Process - *ASC Farm Standard*



*ToR = Terms of Reference



ASC Feed Standard

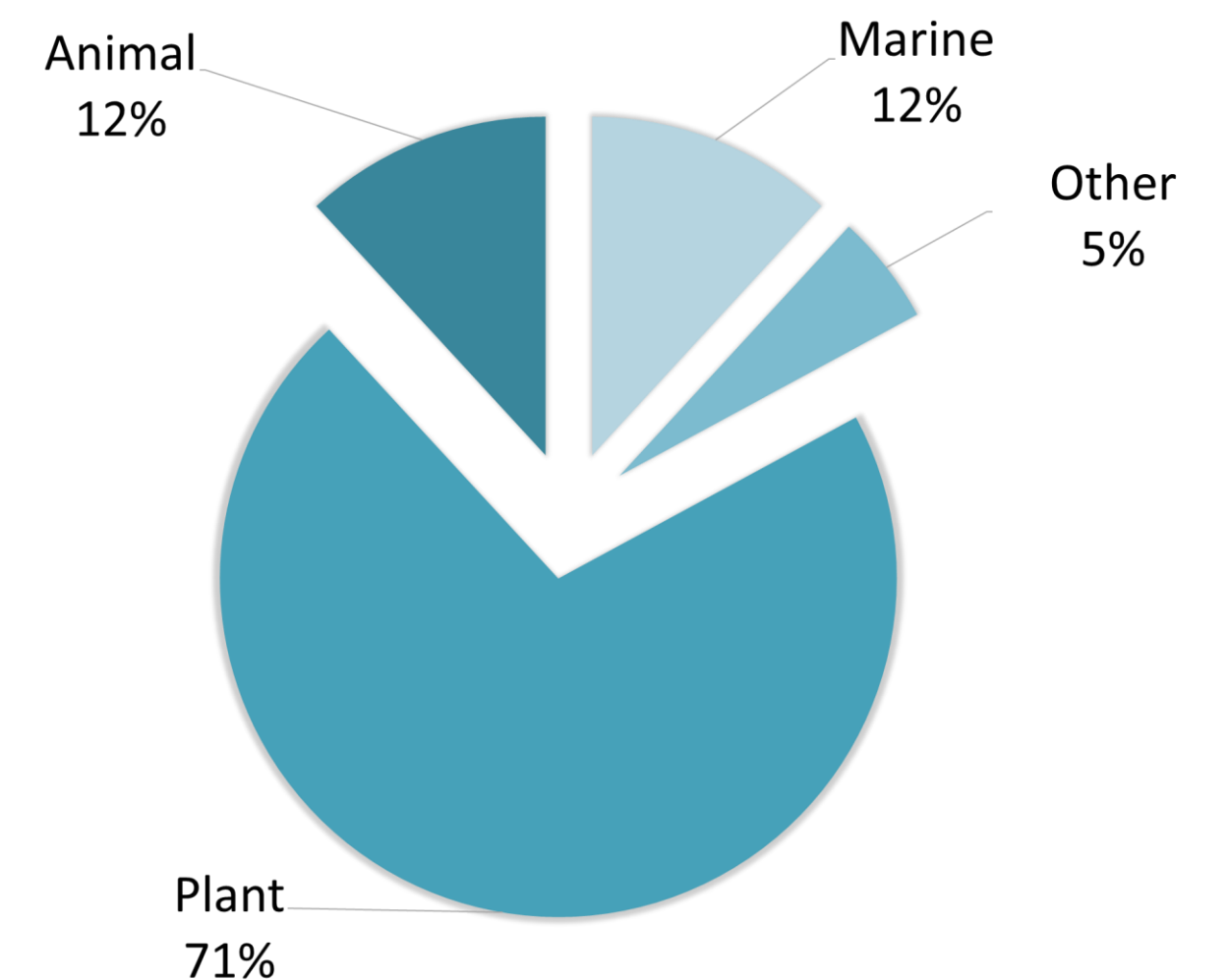
Version 1.0 (June 2021)



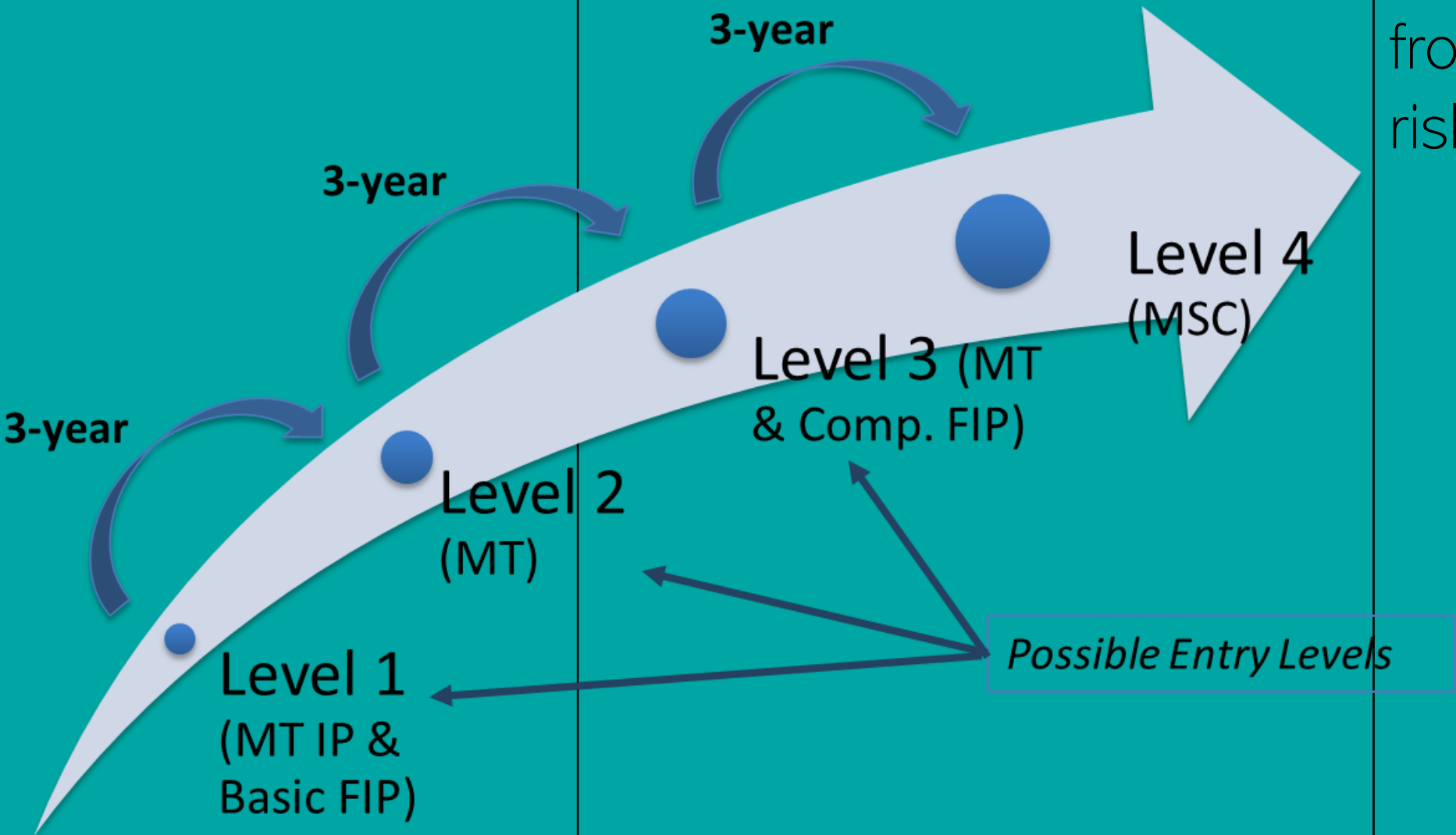
Seabream, Croatia

Why has ASC created a Feed Standard?

- The potential environmental and social impacts of feed are a source of concern for a growing number of consumers
- Those concerns have mainly focused in the past on the impacts caused by **marine ingredients**
- But at a global scale, marine ingredients make up just 12% of total feed ingredients — approx. 70-75% of ingredient volume in aquafeed is derived from **agriculture**



Management system	Supplier Code of Conduct	Input-output accounting	Marine Ingredients	Plant Ingredients
<p>81 requirements on Social and working conditions</p> <p>20 requirements for impacts on social communities</p> <p>20 requirements on operational environmental impacts (water, waste, energy use, GHG)</p>	<p>The feed mill implements a Supplier Code of Conduct</p> <p>Ingredient manufacturers to comply with the Code of Conduct (same social requirements as in the Feed Standard)</p>	<p>Accounting of all in-coming and out-going ingredients</p> <p>MB och SG models allowed. (Logo use only allowed on SG model)</p>	<p>4 sustainability levels (L1 – L4).</p> <p>Continuous improvements build it –</p> <p>more sustainable practices every 3 years.</p>	<p>Feed mills work towards deforestation/conversion-free supply chains – according to the guidelines of the Accountability Framework Initiative</p> <p>Feed mills should reduce the risks associated with high-risk and high-volume raw materials, e.g. by sourcing certified materials or sourcing from a country with a lower risk ranking</p>



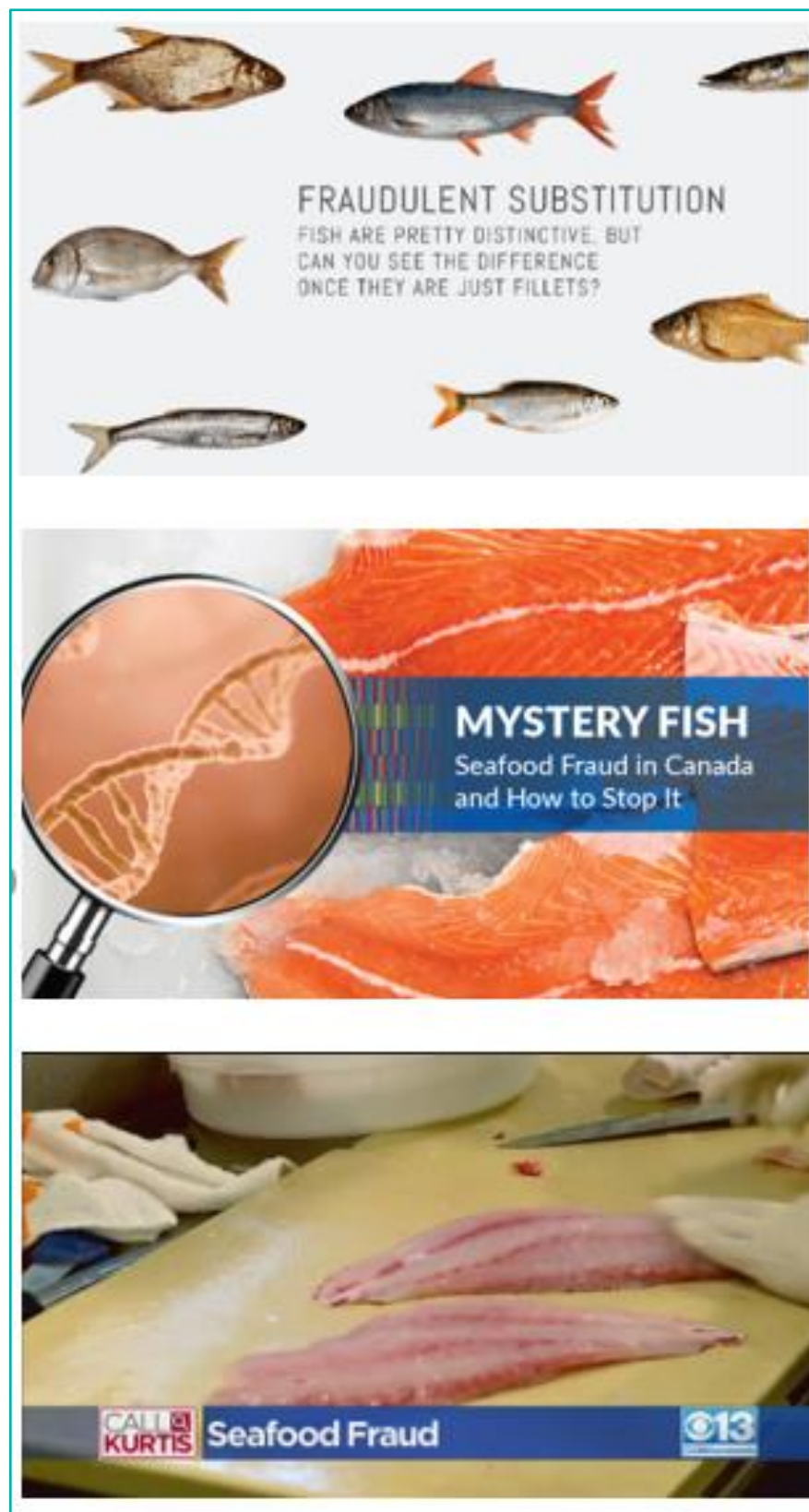
ASC CoC Module

Addressing food safety issues where needed



- Supply chain companies whose activities include **processing, contract processing, packing or repacking** shall be certified by a [Global Food Safety Initiative \(GFSI\) recognized scheme](#) or ISO 22000. This ensures that **food safety is rigorously addressed**.
- If a GFSI-recognised scheme or ISO 22000 certificate becomes invalid, CoC certificate is suspended until the GFSI-recognised scheme or ISO 22000 certificate is reinstated.
- An exemption exists for small businesses on the basis of turnover (less than EUR 2 million annual turnover), volume of products (less than 200 MT annual volume of seafood traded) or number of staff (organisations with less than 50 seafood-business staff - including at peak times)

Mitigating fraud risk by requiring a fraud vulnerability assessment



- Every ASC CoC holder will be required to carry out a food fraud vulnerability assessment, appropriate to the scale of their business, to increase attention to the topic and **mitigate fraud risk**
- While approx. 2/3 of all chain of custody holders already do this under GFSI-recognised schemes, it is a new requirement for up to 1/3 of certificate holders
- The module therefore includes guidance and resources to support the process of conducting such assessment
- ASC aims to become a knowledge resource and to support certificate holders to continually improve this process over time

The Nordic Market

- ASC is looking at hiring a producer outreach manager for the Nordics. Primary focus will be on Norway, but an asset to support the region. Indicates ASC is investing in the region.
- Mid April ASC Northern Europe will pilot a first Newsletter as a way to tie partners closer to the organization and ensure news and updates are distributed.

April 18 ASC will host a webinar and introduce organizations to the ASC CoC Module

<https://events.teams.microsoft.com/event/530bd5a0-b94f-431b-96b0-e02435adce5f@9188a5af-1d3d-4c96-adc4-5a86281aebb7>

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