

# Partner Meeting

Helsinki

Laetitia Rosing – Market Development Manager – Nordics



**Setting The  
Standard for  
Seafood**





# Agenda

1

- Programme status and development
- Feed standard
- Aligned standard (ASC Farm Standard)
- Animal Welfare

2

- Our Impacts
- Latest impact report
- HRAS report
- Improver programme
- KDE

3

- The Market
- Consumer Surveys
- Pausefisk campaign Nordics

21st of September 2023



**Setting The  
Standard for  
Seafood**





# About ASC

## Short back drop

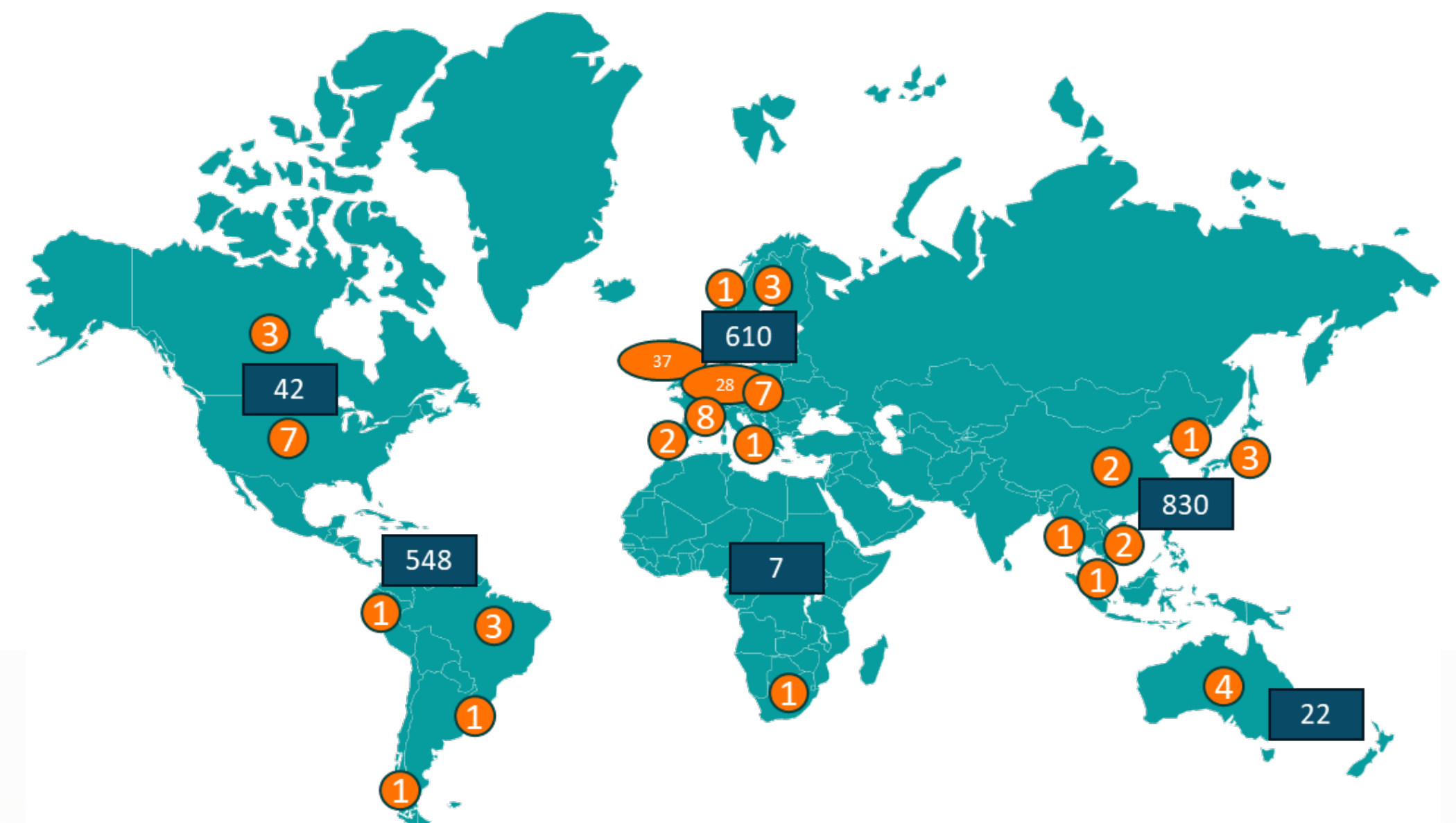
- Impact organization – running the world’s leading certification program for responsibly farmed seafood
- Standard in two parts – environmental and social
- The standard is developed by 2000 aquaculture experts
- Based on best practices and sound science
- Measurable, metric and performance-based standards
- ISEAL\* code compliant

### Our vision

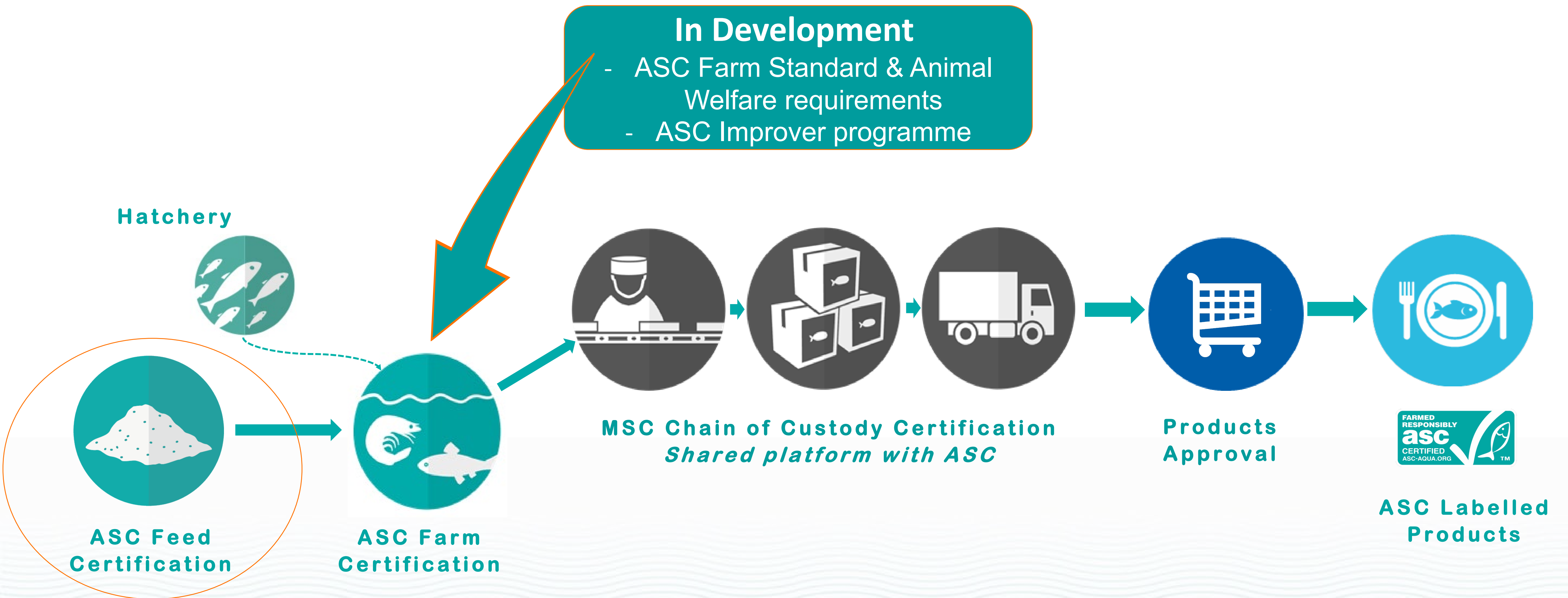
A world where aquaculture plays a major role in supplying food and social benefits for humanity whilst minimizing negative impacts on the environment.

### Our mission

To transform aquaculture towards environmental sustainability and social responsibility using efficient market mechanisms that create value across the chain.



# Programme status and development





# Feed



# Why do we care about feed?

- **>70%** of aquaculture production (excluding algae) is feed
- Feed ingredients can represent up to **80% of carbon footprint** of aquaculture
- **>90%** of that carbon footprint typically occurs at **primary raw material production** level through deforestation, land conversion, fisheries management, agricultural practices, etc.
- **70% of the estimated 160 million child laborers** in the world work in agriculture and fisheries
- **11% of the 16 million people estimated to be in forced labor** work in agriculture and fisheries

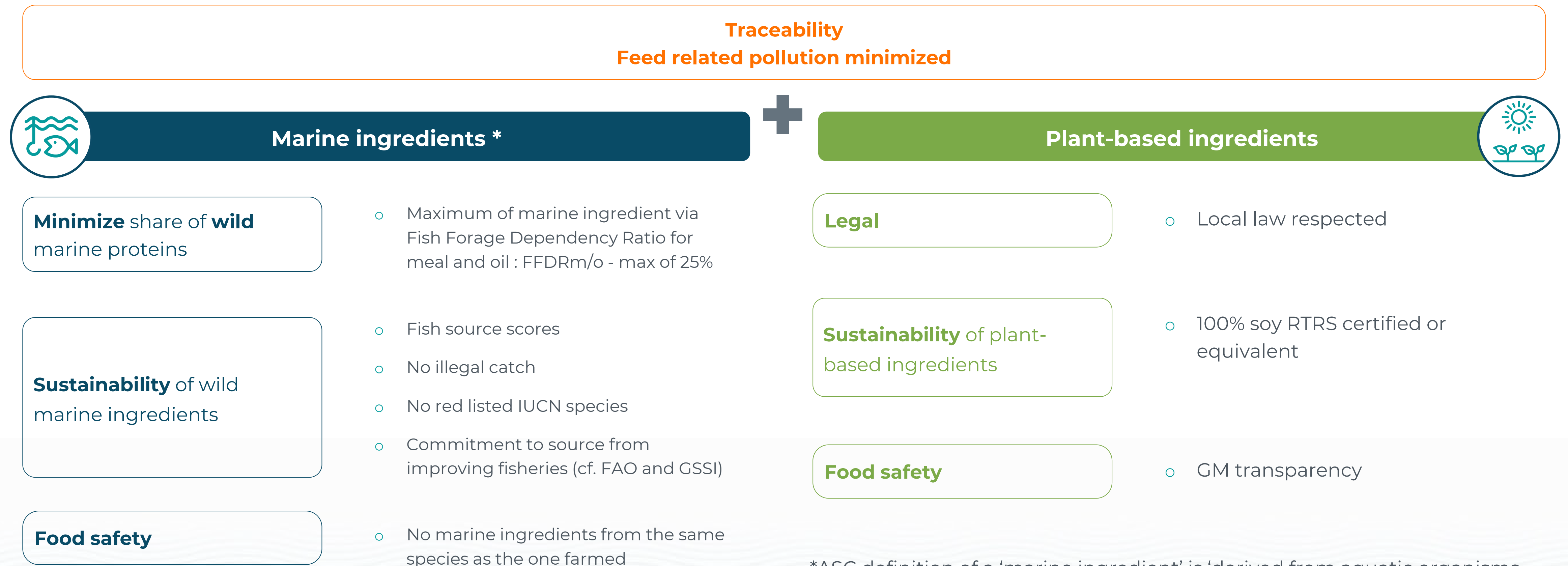
# What are the challenges?

- Feed is typically the **highest input cost** for a farmer
- Must meet **nutritional needs** of fish
- Up to **50 ingredients** per feed product
- **Long** and **complex** feed ingredient **supply chains** make **traceability & verification difficult**



# Today

## Feed criteria currently covered in the Salmon standard

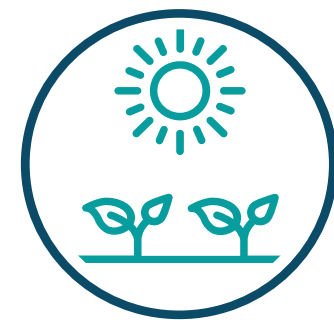


\*ASC definition of a 'marine ingredient' is 'derived from aquatic organisms (both marine and freshwater – capture-based and farm-based) such as fish, krill, squid and shellfish. Ingredients derived from (micro)algae do not fall within this scope'.



# The ASC Feed Standard – your 360° coverage

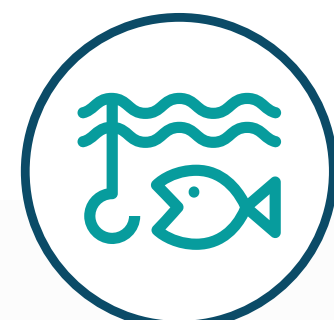
ASC addresses impacts across all key ingredient groups and across the entire ingredient supply chain (feed mills & suppliers)



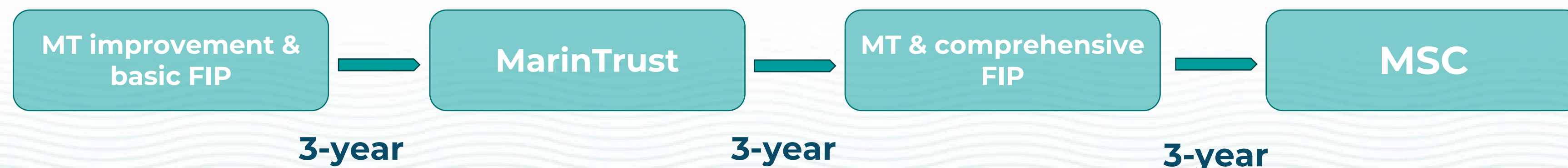
**All crops in the feed** (not just soya and palmoil) need to prove they come from sources that are not involved in **legal or illegal deforestation** and land conversion



**Due diligence** required down to tier 2 suppliers of feed mills for all ingredients (>1% in volume) on **key risks like IUU fishing, child/forced labour**



Works with an improvement model towards certified marine ingredients to provide realistic incentives for fisheries to improve their practices



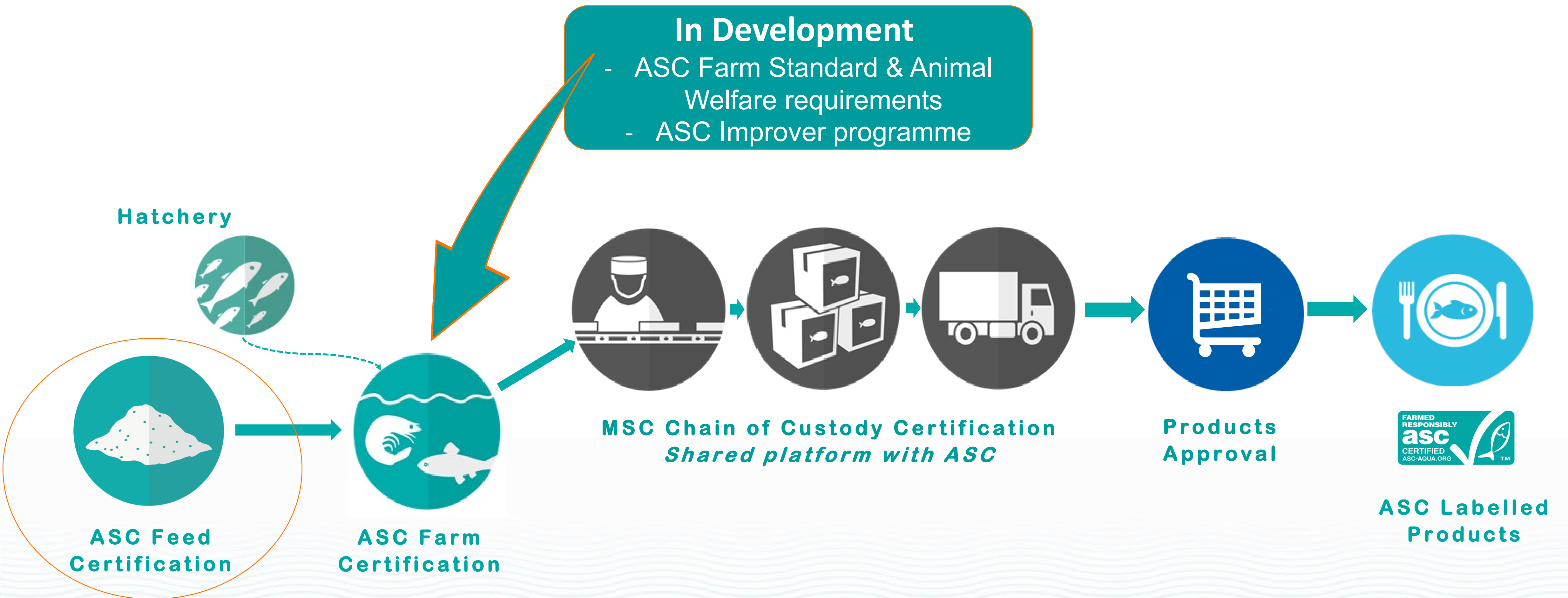
# ASC Feed Programme deployment

## Timeline



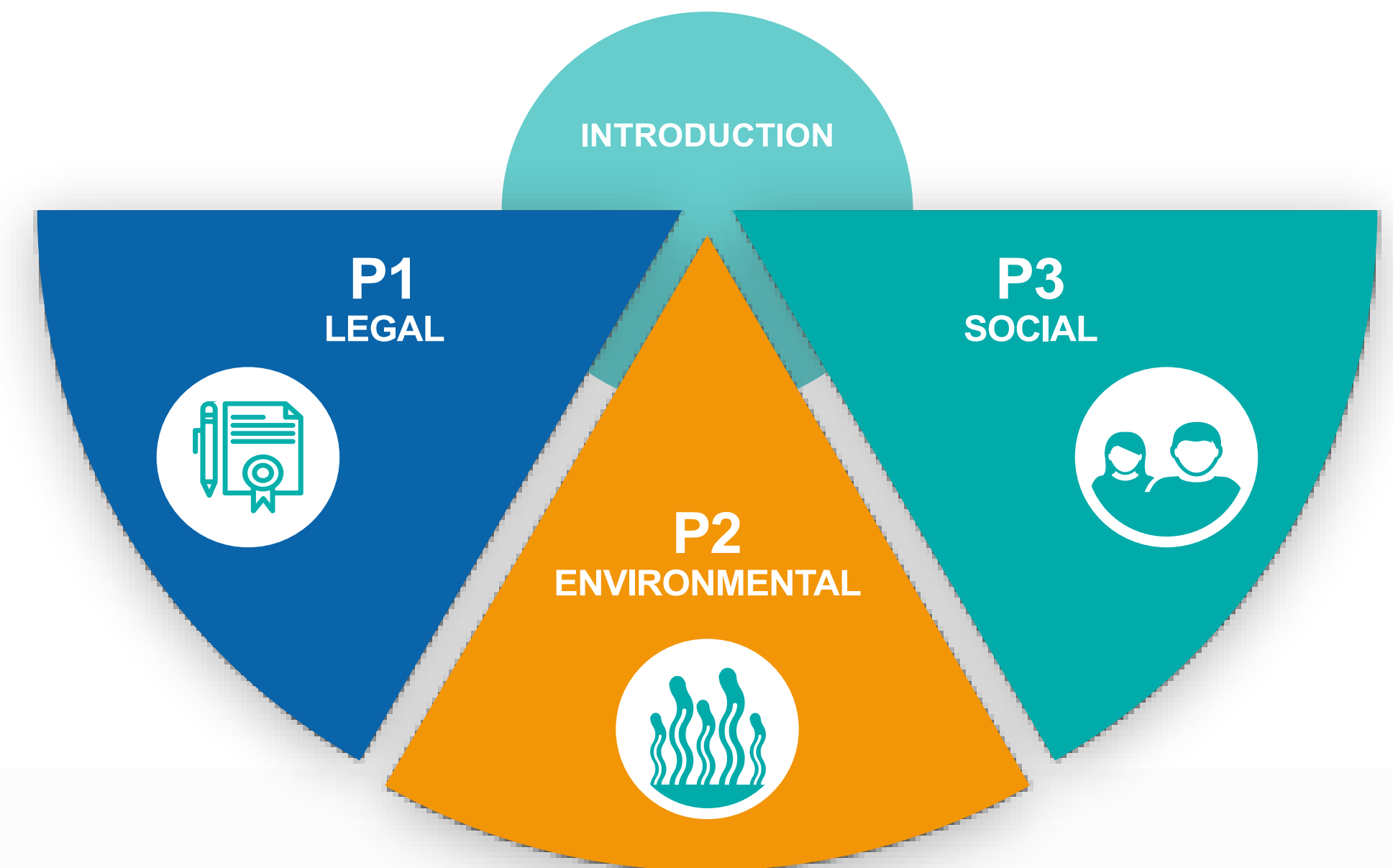
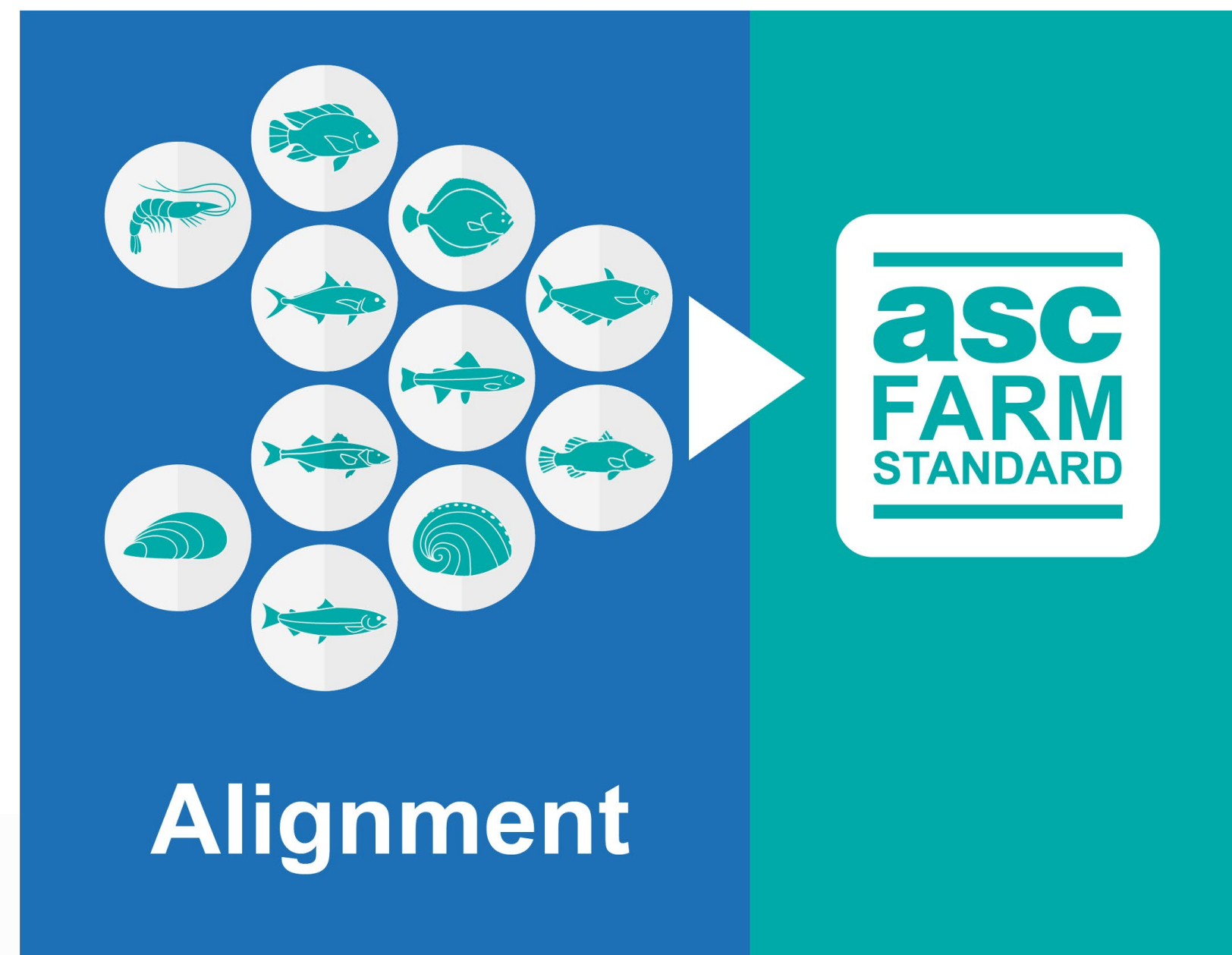


# Programme status and development



# Alignment of 11 ASC Species Standards

... to one ASC Farm Standard: maintain transparency, more consistency



Timelines:

Autumn 2024 – ASC Farm Standard release

Autumn 2025 - Operational

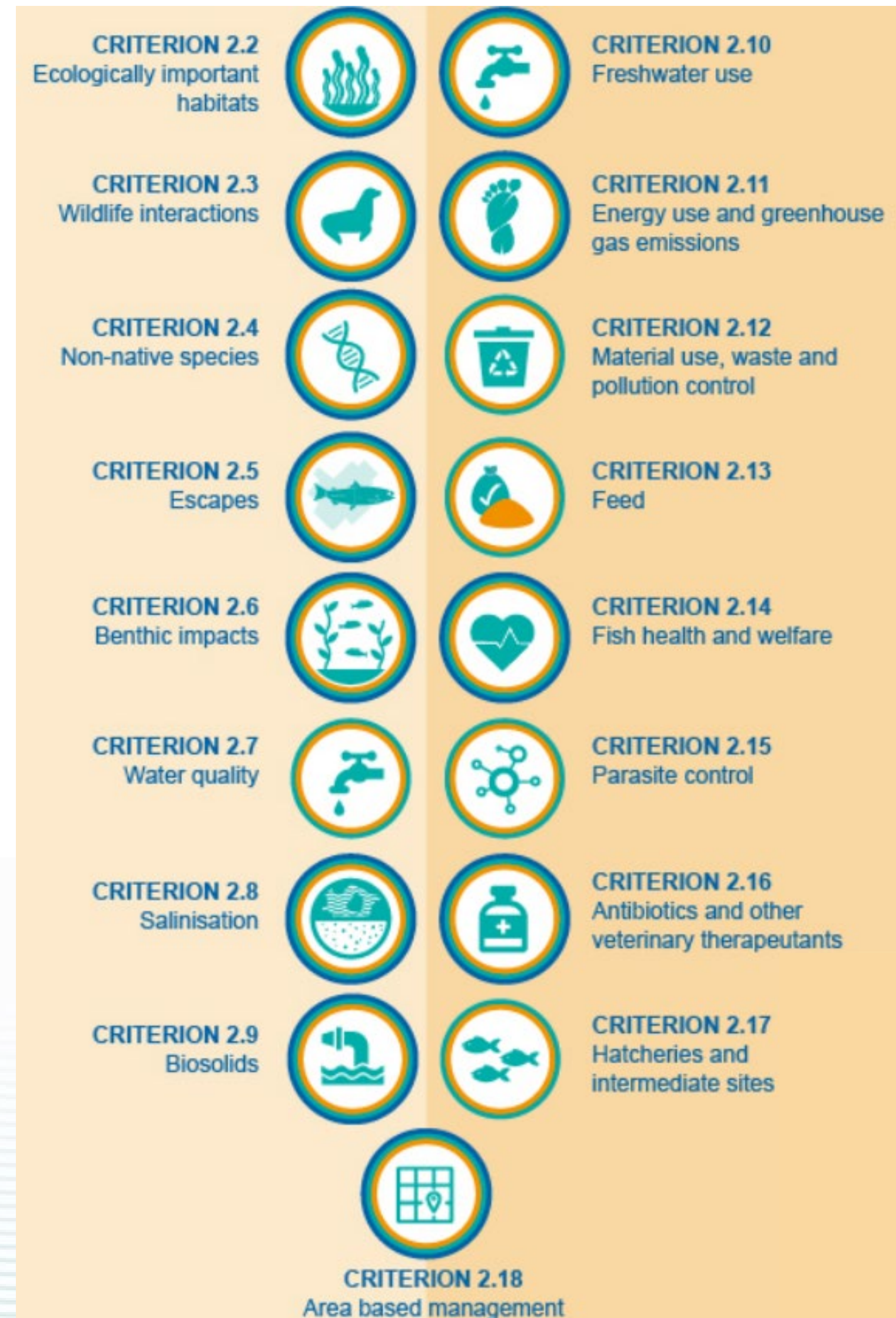


# 3 Principles: in detail

## Principle 1



## Principle 2



## Principle 3





# Principle 2.14: Proposal Animal Welfare

All aspects of animal welfare will be covered



A. Good Management Practices				
- Animal Welfare Management Plan				
B. Housing	C. Feeding	D. Health	E. Behaviour	F. Others
<ul style="list-style-type: none"><li>- Water quality</li><li>- Environmental enrichment</li><li>- Stocking density</li><li>- Tank/pen design</li><li>- Lighting/sound</li></ul>	<ul style="list-style-type: none"><li>- Feed quality</li><li>- Feeding system</li><li>- Feed withdrawal</li></ul>	<ul style="list-style-type: none"><li>- Scoring body condition/lesions</li></ul>	<ul style="list-style-type: none"><li>- Behavioural indicators</li></ul>	<ul style="list-style-type: none"><li>- Handling</li><li>- Slaughter and related processes</li><li>- Cleaner fish</li><li>- Shrimp specific: eyestalk ablation</li></ul>

Permitted methods of stunning <sup>32</sup>	Species								
	Salmon	Trout (FW & SW)	Seabass, seabream, meagre	Pangasius	Tilapia	Seriola	Cobia	Flatfish	Marine Tropical
Percussion	✓	✓				✓			
Electrical	✓	✓	✓	✓	✓	✓	✓	✓	✓
Transition period <sup>33</sup>	Immediate	1 year	3 years	3 years	3 years	3 years	3 years	3 years	6 years










# Aquatic Life Institute

## Benchmark on animal welfare

- The ASC is ranked no 1 with 9,5 out of 12 points possible
- Benchmarked on the proposed animal welfare indicators in the new ASC Farm standard

## 2023 Results

Certifier	Water Quality	Stocking Density & Space Requirements	Environmental Enrichment	Feed Composition	Stunning & Slaughter	Neglected Species (Bonus Points)	2023 Score	2022 Score
 Aquaculture Stewardship Council (ASC)	2	2	1	1.5	2	1	9.5	NA
 Global Animal Partnership (G.A.P.)	2	1.5	2	1	1.5	1	9	8.33
 RSPCA Assured	2	2	0.5	0.5	1.5	2	8.5	6.5
 Naturland	1	2	1	2	1	1	8	6.34
 Friend of the Sea	1.5	1	0.5	0.5	2	2	7.5	4.48
 GLOBALG.A.P.	1	1.5	1	1.5	1	1	7	3.88
 Best Aquaculture Practices (BAP)	1	0	0	1.5	1	0	3.5	3.18



# Our Impacts



**Setting The  
Standard for  
Seafood**



# Increased Market Demand...

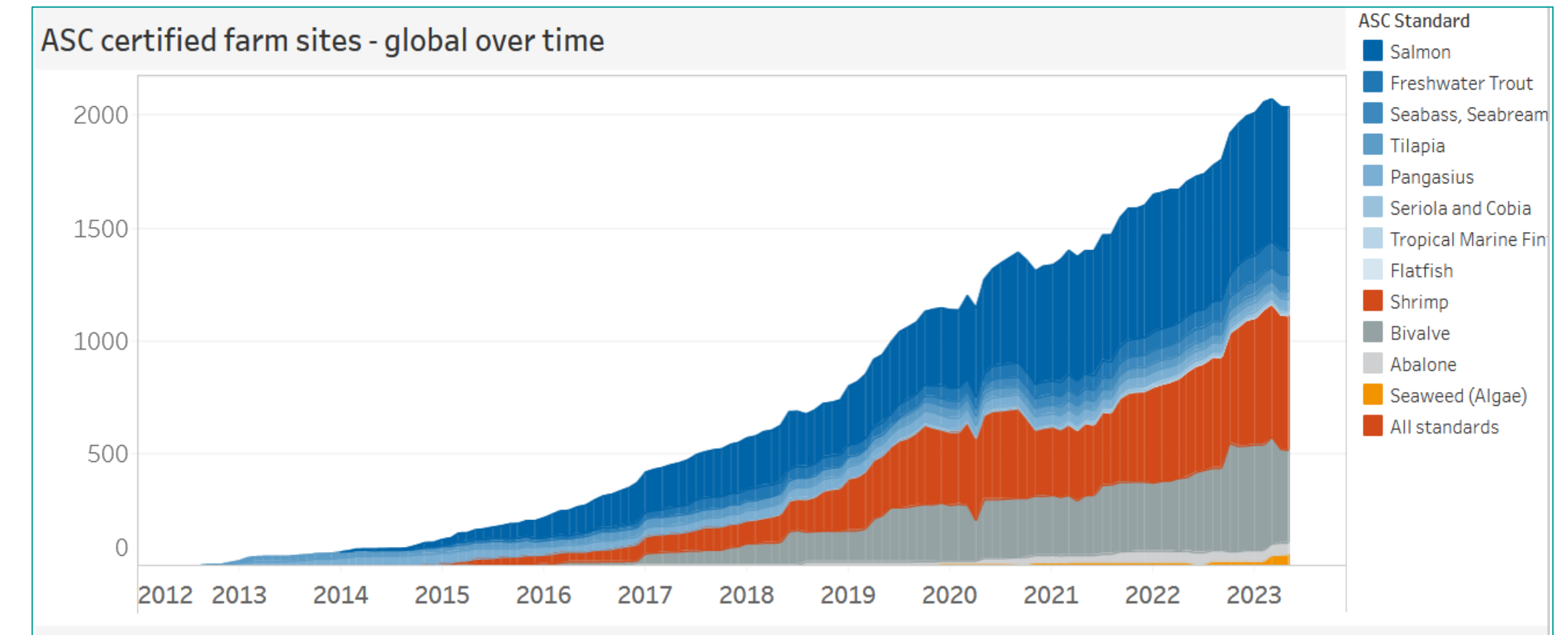
More than **25 000** ASC labelled products **in global markets** and growing year-on-year

**Strong** new uptake of ASC labelled products in the **US, the UK** and **Southern Europe**

**ASC products available in 99 countries**

**1488 improvements to drive environmental responsibility**

**720 improvements to drive social responsibility**



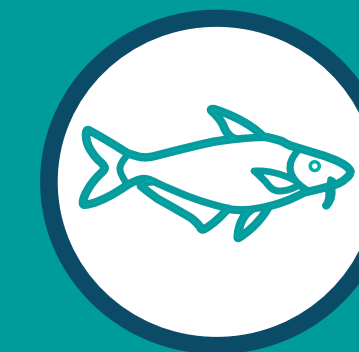
## ...drives Farm Certification Uptake



ASC farms producing nearly **2m tonnes** of **seafood** and **seaweed** annually



Over **2 000** farm sites ASC certified, a **20% increase** from May 2022 and growing year-on-year

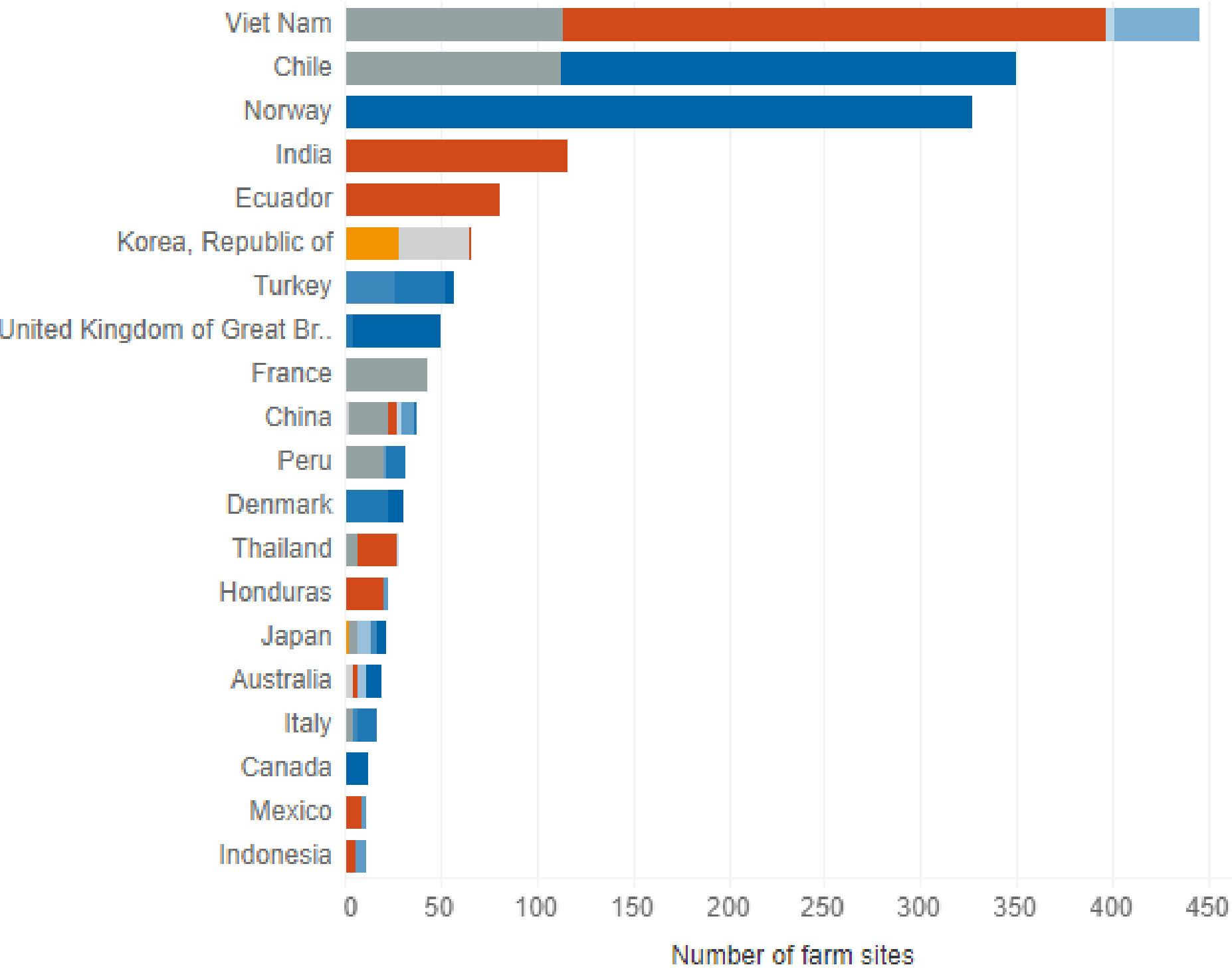


**50** species covered, through **11** species-specific standards

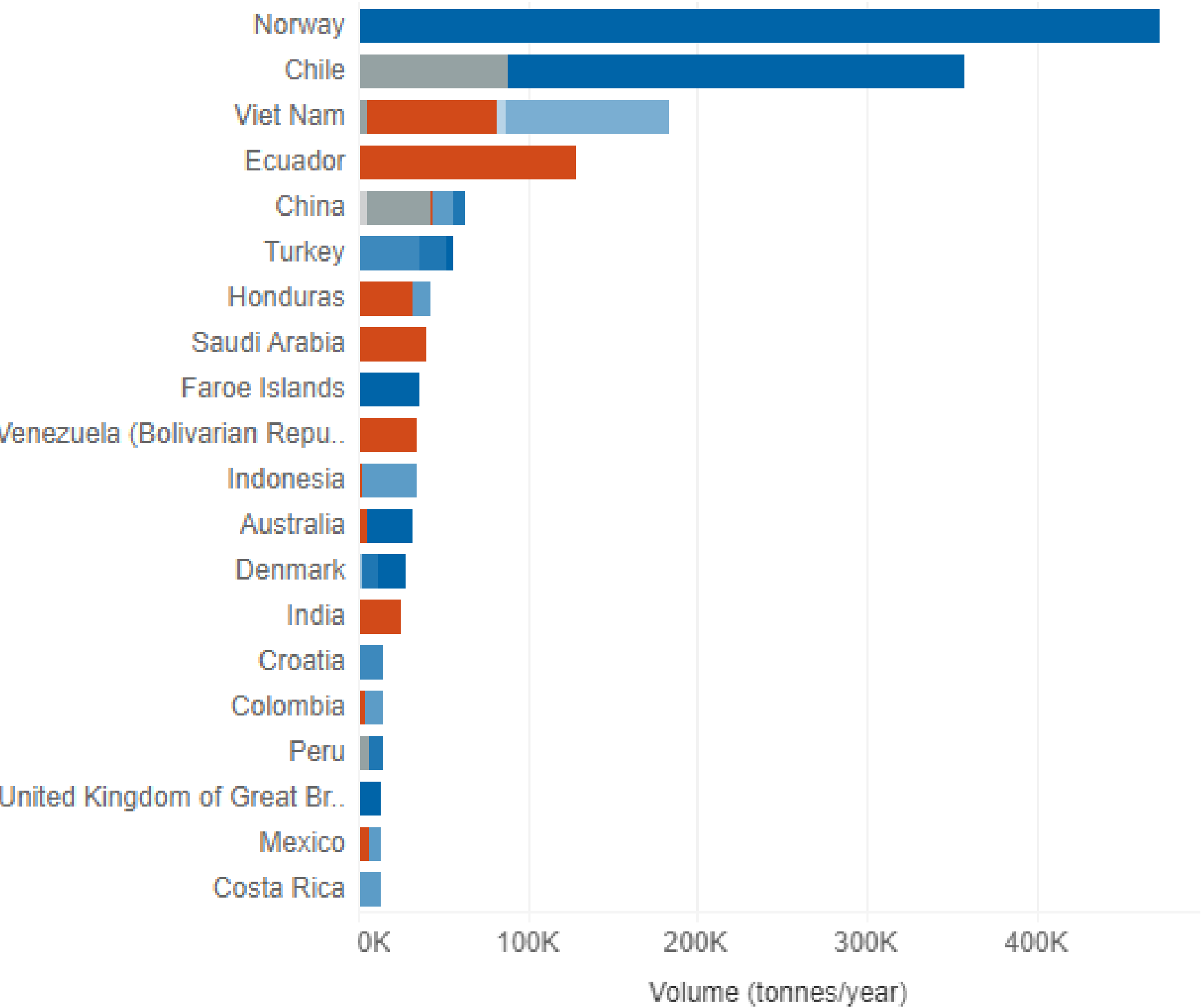
# Farm sites and Volumes

- By Standard – Sep. 1<sup>st</sup> 2023

ASC certified farm sites - by standard, top 20 countries



ASC certified production volume - by standard, top 20 countries



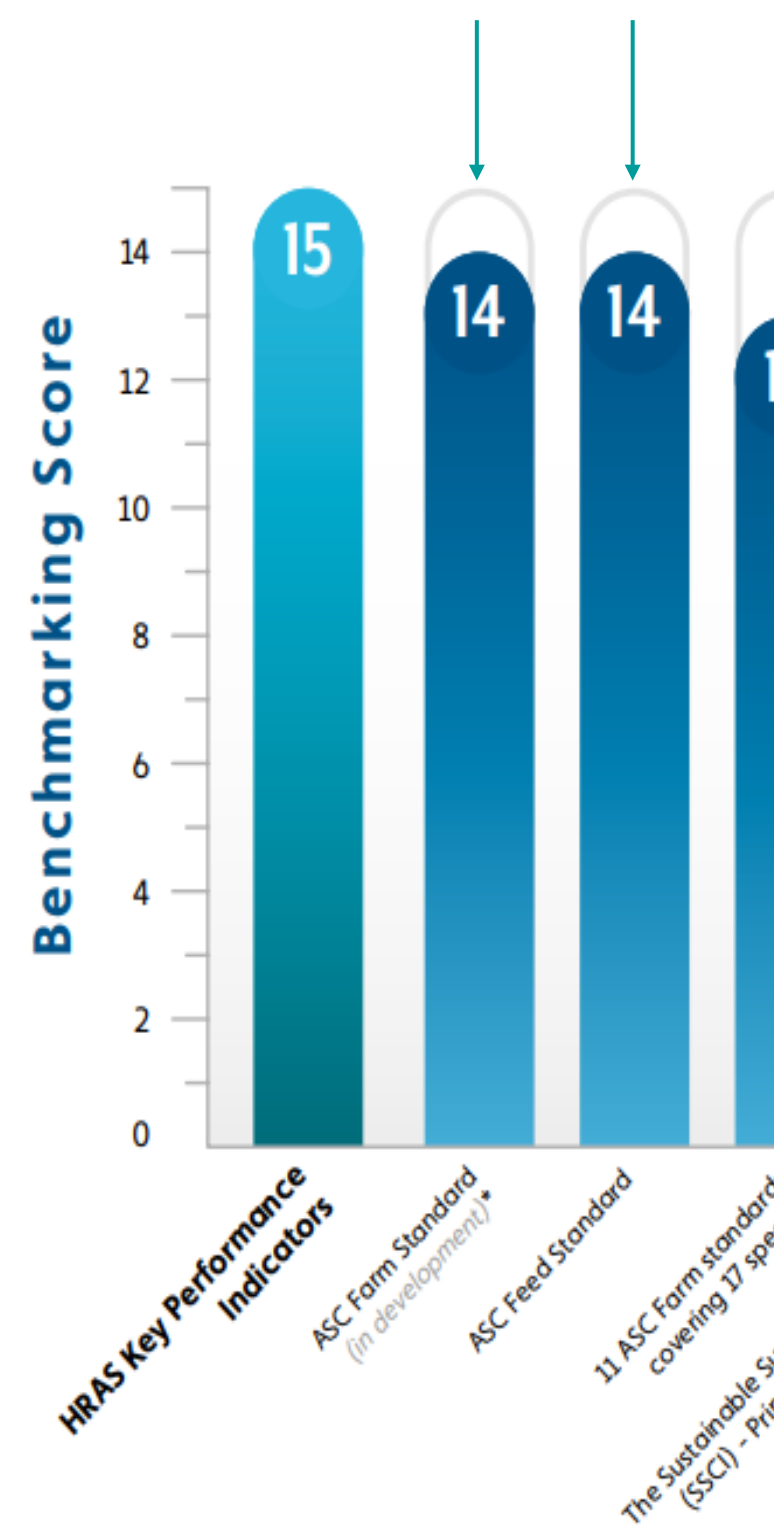
- ASC Standard
- Salmon
  - Freshwater Trout
  - Seabass, Seabream
  - Tilapia
  - Pangasius
  - Seriola and Cobia
  - Tropical Marine Finfish
  - Shrimp
  - Bivalve
  - Abalone
  - Seaweed (Algae)



# ASC takes Leadership in protection of Human Rights

## Human Rights at Sea-Report

- Assessment of 17 active aquaculture certifications, standards and ratings programs
- **ASC’s Standards take five of the six top spots** when assessed against the 15 Key Performance Indicators (KPIs)
- **ASC** Farm Standard and ASC Feed Standard **scored the highest** accounting for 14 KPIs for each Standard
- [Read full report here: Does it do What it Says on the Tin](#)



Category	HRAS KPI
<b>PATHWAY</b> 	Voluntary or mandated?
	Independent anti-bribery and / or corruption front-end accountability.
	Covers (a) human rights.
	Covers (b) labour rights.
<b>TRANSPARENCY</b> 	Covers (c) social rights.
	Public disclosure of clients.
	Public disclosure of client's remediation pathways during an audit / review process.
	Audit / review findings disclosed to workers and/or to the general-public.
<b>MONITORING</b> 	Identification and public disclosure of conflicts of interest(s) in the design, establishment and running of the review process / pathway / platform.
	Policy for vessels to be in port for audits / reviews to be conducted. This KPI does not apply to aquaculture programs.
<b>REMEDATION</b> 	Third party auditing.
	Mediation / Arbitration / Alternative Dispute Resolution (ADR) process profiled and available.
<b>LEGAL</b> 	Company commitment to assist / compel remediation of victims of abuse.
	Explicit reference to and policy statements about the application of the International Bill of Human Rights, pertinent ILO Conventions, and ILO Forced Labour Indicators.
	100% assurance that workers have access to legally binding contracts of employment that provide requisite protections of worker rights.
	Engagement with National Human Rights Institutions (NHRI) or Regional Human Rights Mechanisms (RHRM) or UN Human Rights system





Improver<sup>BY</sup>  
Programme **asc**

Supporting ASC's mission to transform  
global aquaculture



**Setting The  
Standard for  
Seafood**



# Improver Programme by ASC

## Transparent and credible AIPs

### Why do we need AIPs?

- **Aquaculture Improvement Projects (AIPs)** are a markets-based approach to drive improvements on-farm and throughout the supply chain
- AIPs can be used by the industry to **engage with their supply chain** and use the power of the market to incentivise improvement work
- **Retailers refer to “credible AIPs”** in their procurement practices (e.g., Walmart, Aldi, Ahold Delhaize, Loblaws)
- Market can use AIPs to build a **pipeline for future certification** and secure long-term supply





# Improver Programme by ASC

## Transparent and credible AIPs

### How are our AIPs different?

Our AIPs are

- **Timebound** to a max of 3 years - giving you a clear timeline on when to expect certified supply!
- **Structured** (starting with a gap analysis, comprising 4 phases with gradual improvement steps) - setting the basis for good story-telling on positive impact
- **Verified** (regular and independent verification of progress, covered by ASC) - providing you the basis for trusting the progress made
- **Transparent** (progress reports published on our website)

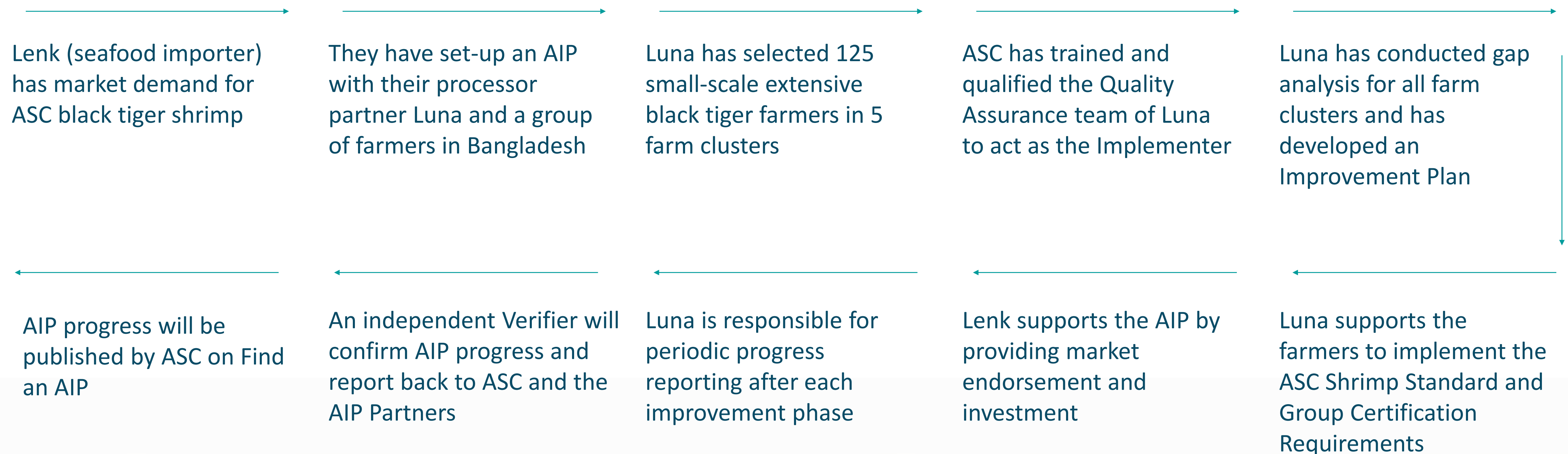
**making AIPs under the Improver Programme by ASC credible!**



# AIPs

## How does it work?

### An example: AIP2ASC in Bangladesh with 125 extensive black tiger shrimp farmers



# All info available under "Find an AIP"

Advanced search tool to find exactly those projects matching your interest

asc

ASC-AQUA.ORG

Seafood lovers

Producers

Business

More

AIP CODE

Select or type an AIP code

COMPANY

Select or type a company

COUNTRY

Select or type a country

ACTIVE PHASE

Select or type phase stage

STATUS

Select or type a status

EXPECTED CERTIFICATION

Select or type a certification type

PRODUCTION SYSTEM

Select or type a production system

SPECIES GROUP

Select or type a species group

IMPLEMENTER

Select or type an implementer

VERIFIER

Type a verifier name

SEARCH

X REMOVE ALL FILTERS

Or try to filter a company in map

Search for a company name in map...

Q

+

-

1

2

3

4

5

6

7

8

Detailed insights into each AIP based on structured approach and verified progress

asc

ASC-AQUA.ORG

Seafood lovers

Producers

Business

More

RETURN

AIP Detail

EXPORT

AIP:

AIP00008

COMPANY:

Lakshmikhola (Luna)

START DATE:

Jun 6 2023

STATUS

Self evaluation phase 0

IMPROVEMENT SCOPE:

AIP2ASC (Aquaculture Improvement Project towards ASC Certification)

PARTNER:

Luna Seafoods

COUNTRY

Bangladesh

END DATE:

Jun 5 2026

EXPECTED CERTIFICATION:

Group certification

PHASE:

Phase 0

100%

Indicators that must be complied when applying to be AIP

Mandatory

100%

Essential

10%

Optional

80%

Eligible

20%

Mandatory

50%

Essential

5%

Optional

Phase 0

In progress

Gap analysis and improvement plan approved by ASC.

Phase 1

Finished the 1st verification.

Phase 2

Finished the 2nd verification.

Phase 3

Finished the 3rd verification.

Phase 4

Finished the 4th verification & completed AIP.

asc

ASC-AQUA.ORG

Setting The Standard for Seafood



# How you can get involved

The improvement space requires action and collaboration

## Start an AIP

Take ownership and responsibility in your supply chain and be a force for good

- Bring your supply chain partners together to explore interest
- Set-up an AIP by discussing roles & responsibilities, objectives and investment needed
- Make claims linked to your role and participation
- Contact us on how to apply

## Source from an AIP

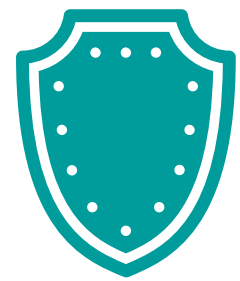
Harness the strength of the market to incentivise improvement work

- Go to [Find an AIP](#) and see which AIPs are available to source from
- Contact us for more information

# Key Data Elements - KDE

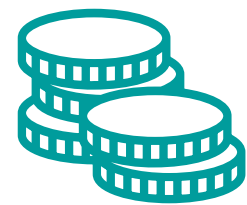
You receive increased traceability and insights into the origins of the ASC labelled shrimp products you are purchasing from India and Vietnam

## Pilot project on shrimp from Vietnam and India



### Origin assurance

You receive increased traceability and insights into the origins of the ASC labelled shrimp products you are purchasing from India and Vietnam



### Sales value

Your customers expect you to have insights into product origin at this level. A product that carries the ASC label can be digitally traced back to ASC certified farms



### Alert function

Be alerted more rapidly and with greater accuracy to any issues with certified shrimp in your supply chain, allowing you to take action more swiftly



### Quick, easy system

The GDST\*-aligned KDE system replaces costly and time-consuming paper-based traceability systems, which can be prone to error\*\*



### Reputation

Help meet your environmental and social commitments by providing supply chain visibility and assurances, which you can evidence to address societal concerns



# The Market

Opportunities and inspiration



**Setting The  
Standard for  
Seafood**



# Increased Market Demand...

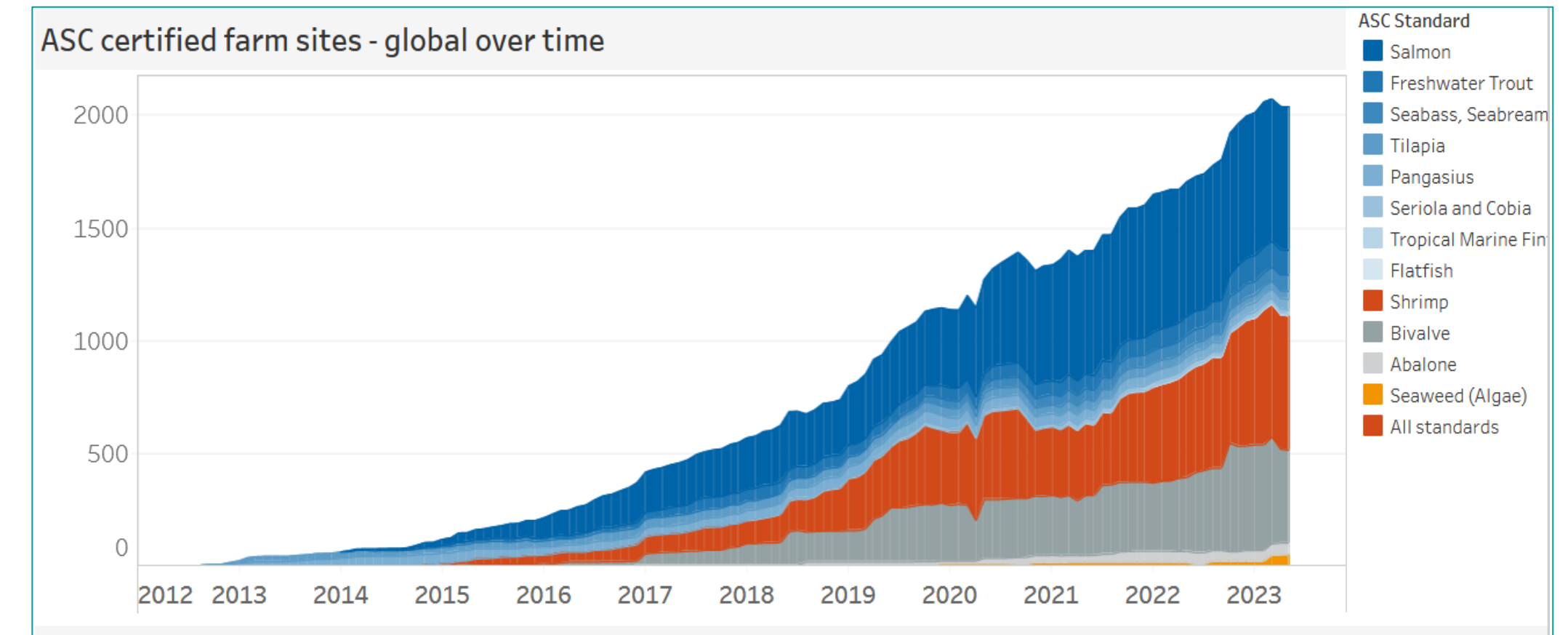
More than **25 000** ASC labelled products **in global markets** and growing year-on-year

**Strong** new uptake of ASC labelled products in the **US, the UK** and **Southern Europe**

**ASC products available in 99 countries**

**1488 improvements to drive environmental responsibility**

**720 improvements to drive social responsibility**



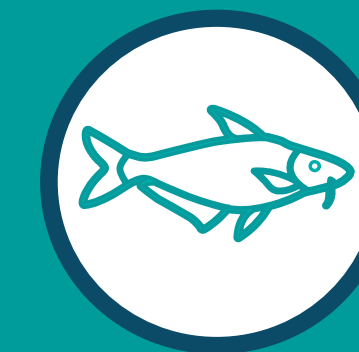
## ...drives Farm Certification Uptake



ASC farms producing nearly **2m tonnes** of **seafood** and **seaweed** annually



Over **2 000** farm sites ASC certified, a **20% increase** from May 2022 and growing year-on-year

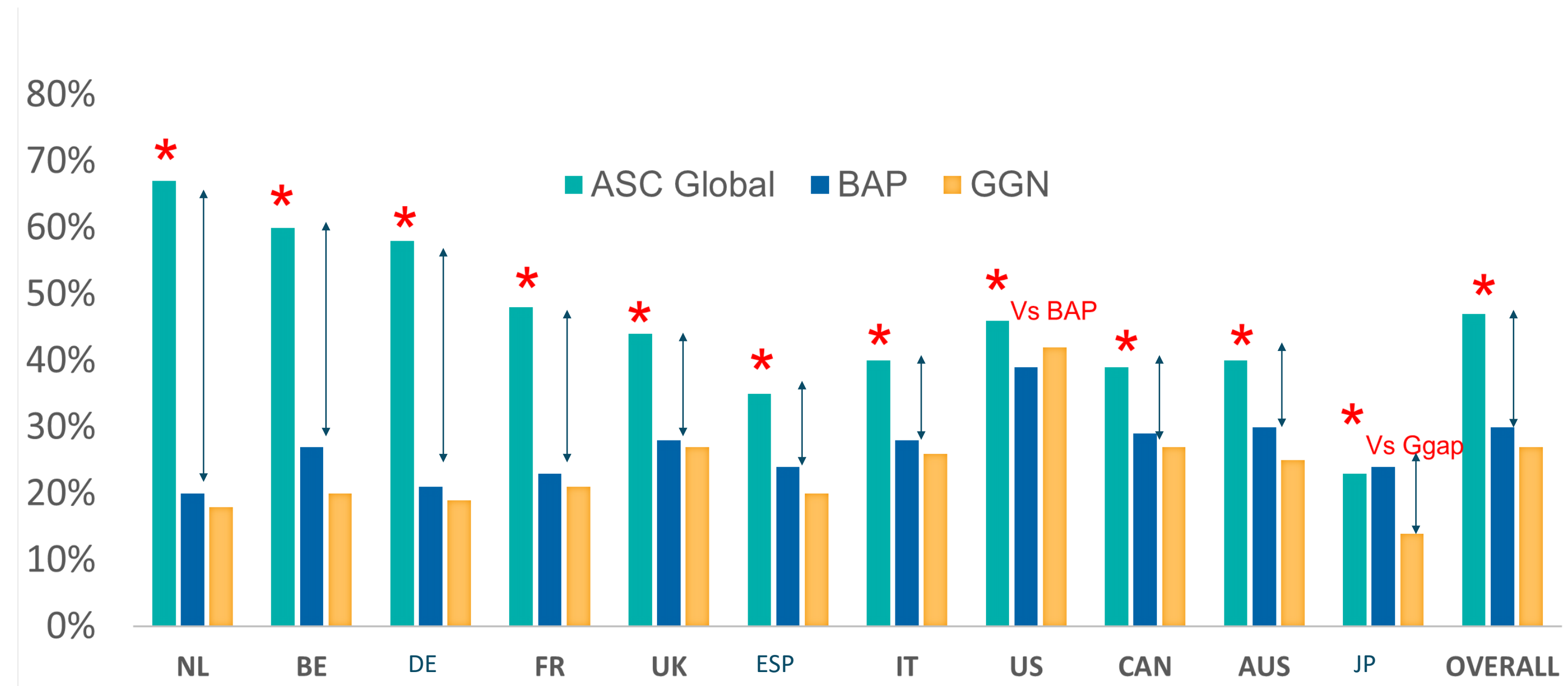
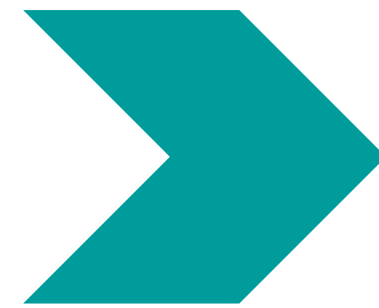


**50** species covered, through **11** species-specific standards



# The ASC label is recognised and trusted

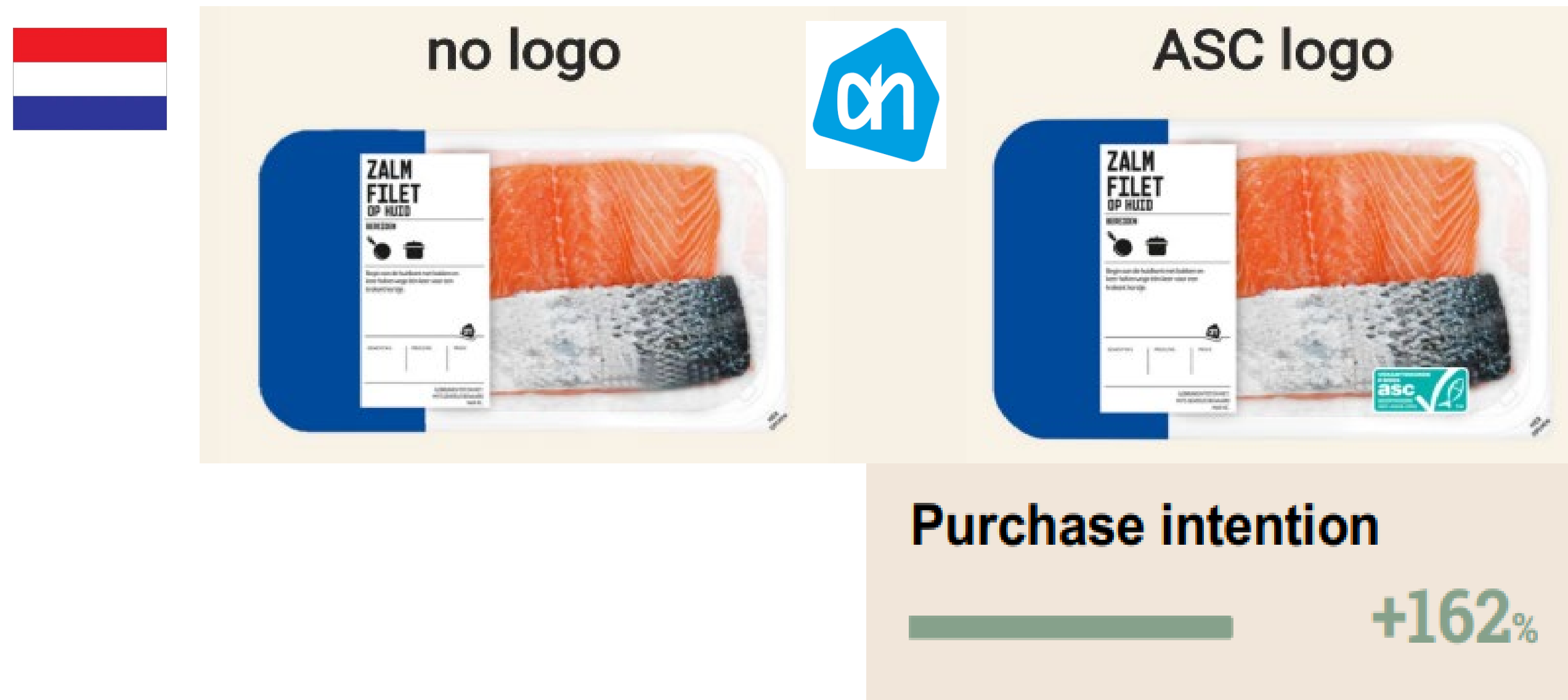
Our ASC label is highly recognised and trusted worldwide, **boosting** your **seafood sales opportunities**



Global Consumer Survey 2022, The Conversation Studio, (N>12000 in total seafood consumers, N > 1000 per country)

- Significant higher brand recognition in many important markets
- Significant higher trust levels in many important markets
- Significant higher association with Sustainability in many important markets

# Trust and recognition boosting sales





# ASC “Pausefisk”

A Nordic campaign for growing  
consumer awareness of the ASC label



**Setting The  
Standard for  
Seafood**

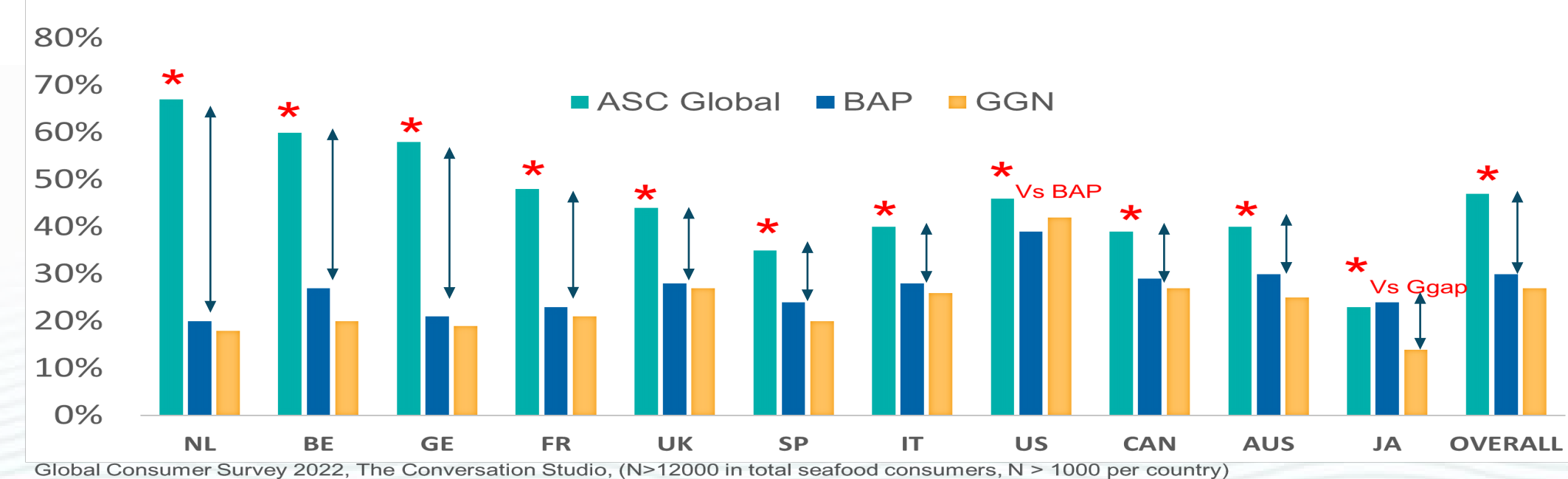


# Sustainability matters to consumers

- Today, **people eat less red meat and more fish**, plant-based foods and poultry.
- Fish and seafood are seen as important in food shopping by  $\pm 90\%$  of all consumers surveyed. It is chosen to be part of a healthy and balanced diet.
- When it comes to seafood, **sustainability topics are important for 60-80%** of consumers.
- More than 50% of consumers agree **they specifically look for sustainably sourced seafood**.
- Labels on seafood are in general **the most trustworthy source of information** for consumers.
- Globally, **ASC ranks highest** among farmed seafood sustainability labels in **awareness/recognition and trustworthiness**.



Setting The  
Standard for  
Seafood

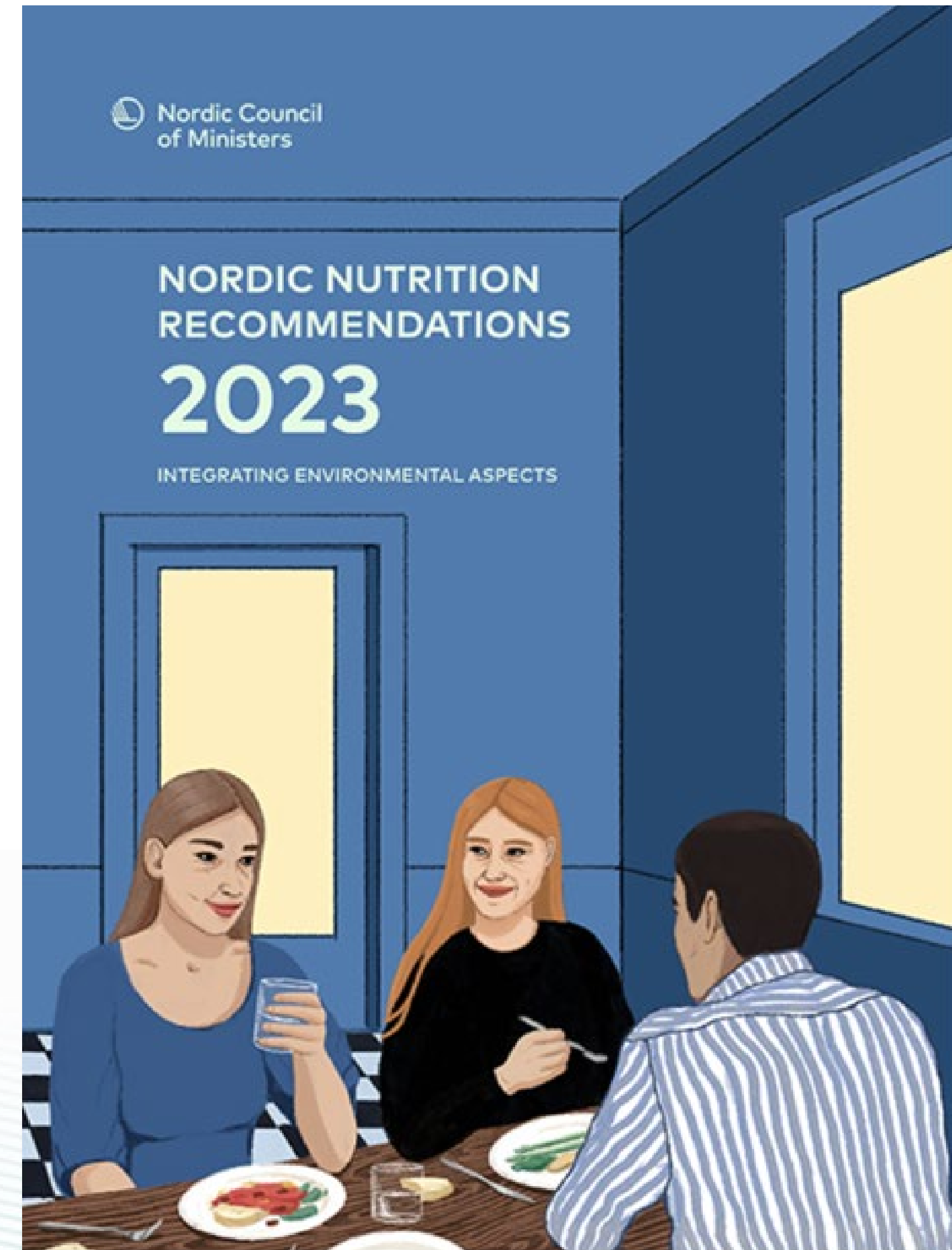




# New Nordic Nutrition Recommendations

Advised

**Eat more fish from sustainable sources** — between 300 and 450 grams each week, with at least 200 grams per week from fatty fish.



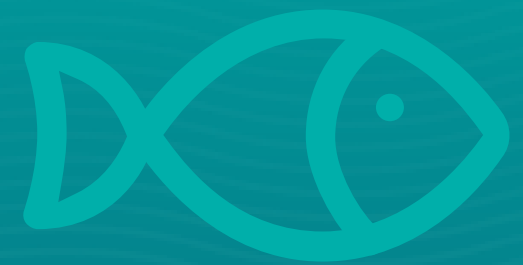
# Why do consumers choose sustainable seafood?

They prioritise their own health, the environment and social responsibility.



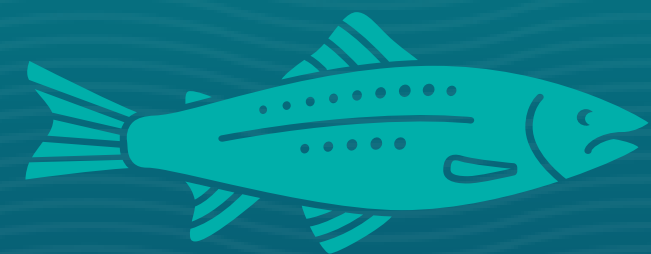
**Healthy for me → 82-85%**

ASC labelled seafood is farmed without undue antibiotic use or other unnecessary chemicals.



**Environment → 80-83%**

The ASC label ensures fish has been farmed with the minimum impact on biodiversity & habitats.



**Social responsibility → 73-78%**

ASC certified farms take good care of their workers & local communities.



# The opportunity

Be one of the first retailers in Finland to give consumers what they're asking for when you draw their awareness to the ASC label on seafood in your stores.



Social assets



Social media

In-store



Digital advertising

In-store aisle  
fins

...& more

# An open door for opportunity...



Phase 1:  
Denmark (Pilot)  
October 2023

Phase 2:  
Nordics  
Dates TBD in 2024



# Pausefisk in Denmark

October 2023 – SoMe Campaign

- Nostalgia
- Mesmerizing
- Element of surprise
- Triggers the viewer to watch until the end
- Logo is shown many times – build recognition
- Fun and unusual (not realistic)
- Simple and clear message





# Kiitos!



**Setting The  
Standard for  
Seafood**

**Aquaculture Stewardship Council  
Daalseplein 101, 3511 SX, Utrecht, Netherlands  
Tel: +31 30 230 5929**

**[www.asc-aqua.org](http://www.asc-aqua.org)  
[communication@asc-aqua.org](mailto:communication@asc-aqua.org)  
Aquaculture Stewardship Council, 2016**

Aquaculture Stewardship Council Limited, 27 Old Gloucester Street, London, WC1N 3AX. The ASC is a charity registered in England and Wales no 1150418.  
A non-profit making company limited by guarantee. Registered in England no 08172832. The ASC logo is a registered trademark.