

Partnermøde

Danmark

Laetitia Rosing – Market Development Manager – Nordics



**Setting The
Standard for
Seafood**



Agenda

1

- **Hvad gør ASC? – kort film om os**
- **Program status og nyheder**
 - Hvorfor er foder så vigtigt?
 - Ny strømlinet standard - ASC Farm Standard
 - Med fokus på dyrevelfærd

2

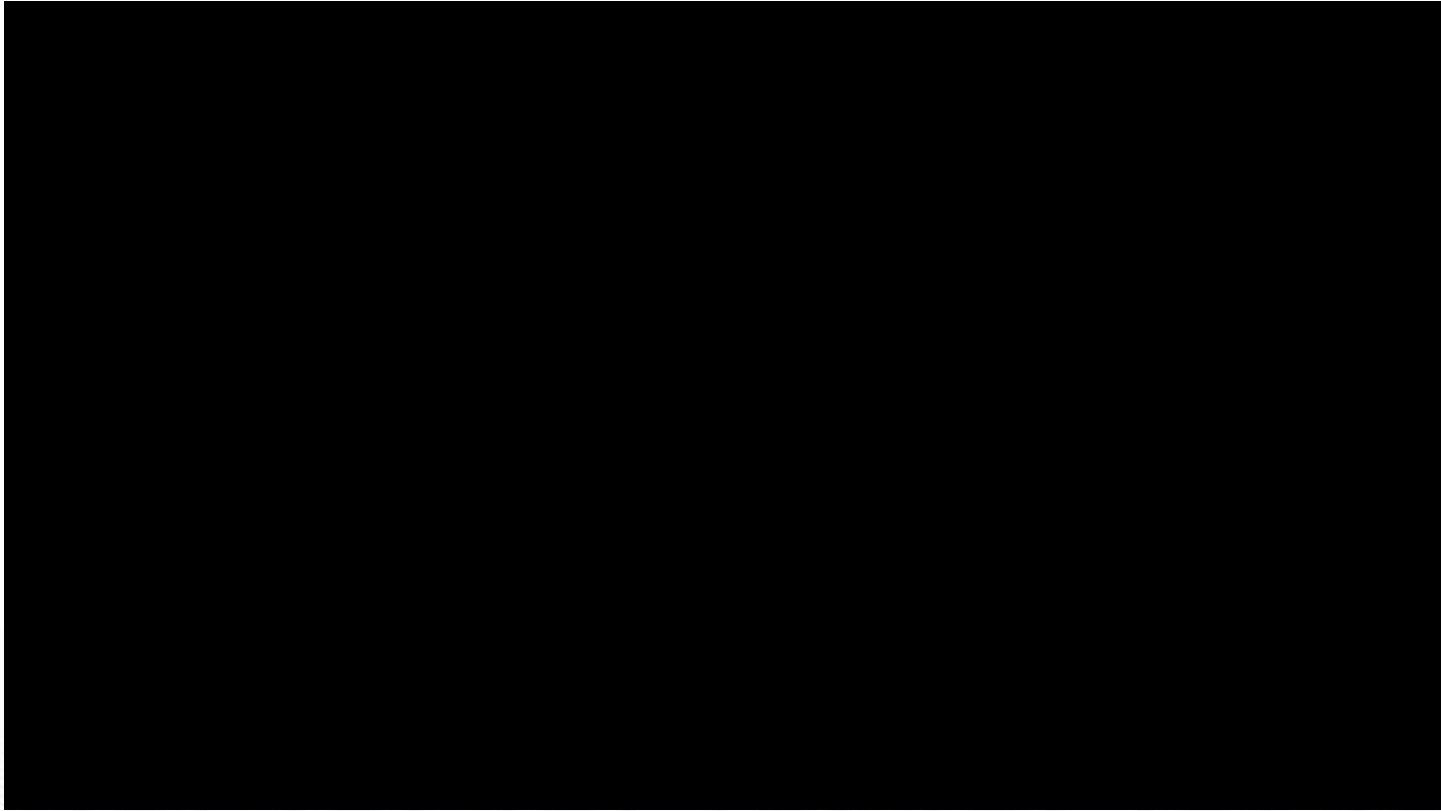
- **Hvad fører vores arbejde til ?**
 - Seneste "Impact Report"
 - Hvilken forskel gør ASC i praksis – laks og scampi som eksempler...
- **Markedet**
 - Forbruger undersøgelser
 - Pausefisk kampagne i Danmark

30. November 2023



**Setting The
Standard for
Seafood**

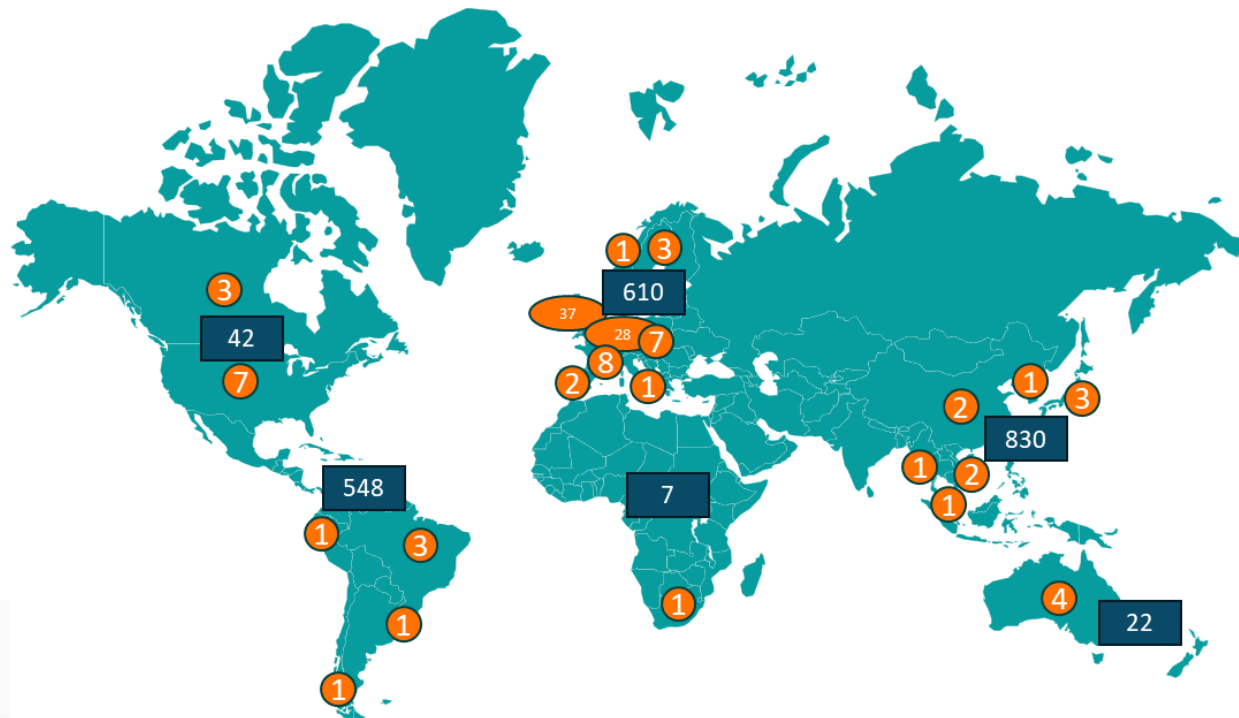




Setting The
Standard for
Seafood

ASC's presence

- 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



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**

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 palm oil) need to prove they come from sources that are not involved in **legal or illegal deforestation** and land conversion



Feed mills must run a **Due Diligence of their suppliers of both marine and vegetal raw material** (>1% in volume) two levels down the supply chain on key risks like **IUU fishing, child/forced labour**



Feed mills must work with an **improvement model towards certified marine ingredients** to provide realistic incentives for fisheries to improve their practices

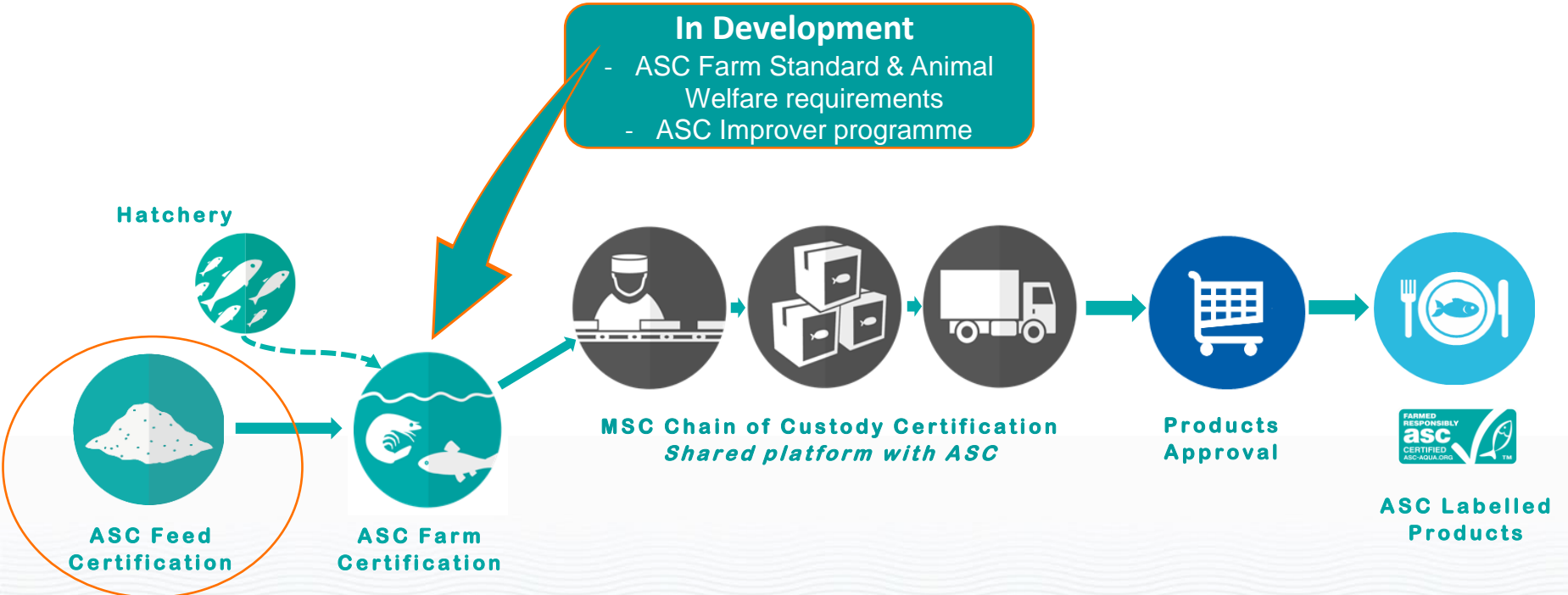


ASC Feed Programme deployment

Timeline

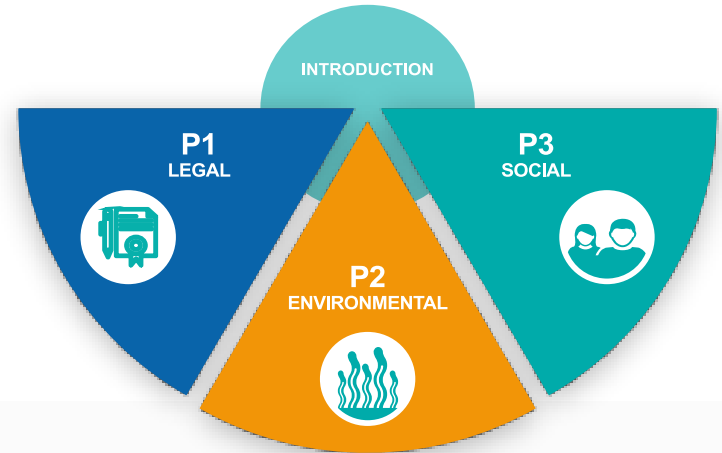
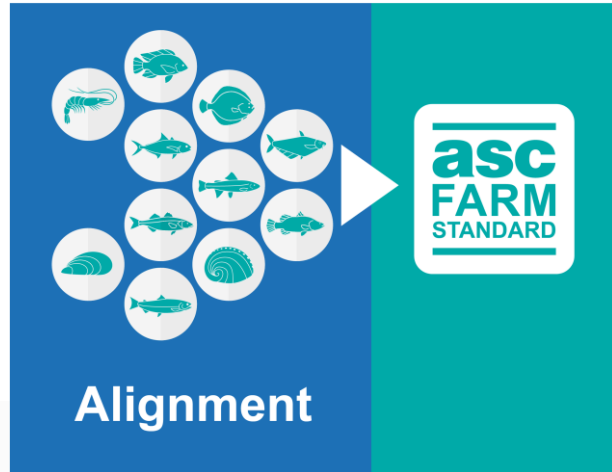


Programme status and development



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

| | | | |
|------------------------------------|--|--|--|
| CRITERION 1.1 Legal compliance | | | CRITERION 1.3 Business ethics |
| CRITERION 1.2 Management system | | | CRITERION 1.4 Traceability and transparent disclosure |

Principle 2

| | | | |
|--|--|--|--|
| CRITERION 2.2 Ecologically important habitats | | | CRITERION 2.10 Freshwater use |
| CRITERION 2.3 Wildlife interactions | | | CRITERION 2.11 Energy use and greenhouse gas emissions |
| CRITERION 2.4 Non-native species | | | CRITERION 2.12 Material use, waste and pollution control |
| CRITERION 2.5 Escapes | | | CRITERION 2.13 Feed |
| CRITERION 2.6 Benthic impacts | | | CRITERION 2.14 Fish health and welfare |
| CRITERION 2.7 Water quality | | | CRITERION 2.15 Parasite control |
| CRITERION 2.8 Salinisation | | | CRITERION 2.16 Antibiotics and other veterinary therapeutants |
| CRITERION 2.9 Biosolids | | | CRITERION 2.17 Hatcheries and intermediate sites |
| | | | CRITERION 2.18 Area based management |

Principle 3

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

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"> - Water quality - Environmental enrichment - Stocking density - Tank/pen design - Lighting/sound | <ul style="list-style-type: none"> - Feed quality - Feeding system - Feed withdrawal | <ul style="list-style-type: none"> - Scoring body condition/lesions | <ul style="list-style-type: none"> - Behavioural indicators | <ul style="list-style-type: none"> - Handling - Slaughter and related processes - Cleaner fish - Shrimp specific: eyestalk ablation |








| Permitted methods of stunning ³² | Species | | | | | | | | |
|---|-----------|-----------------|---------------------------|-----------|---------|---------|---------|----------|-----------------|
| | Salmon | Trout (FW & SW) | Seabass, seabream, meagre | Pangasius | Tilapia | Seriola | Cobia | Flatfish | Marine Tropical |
| Percussion | ✓ | ✓ | | | | ✓ | | | |
| Electrical | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Transition period ³³ | 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...

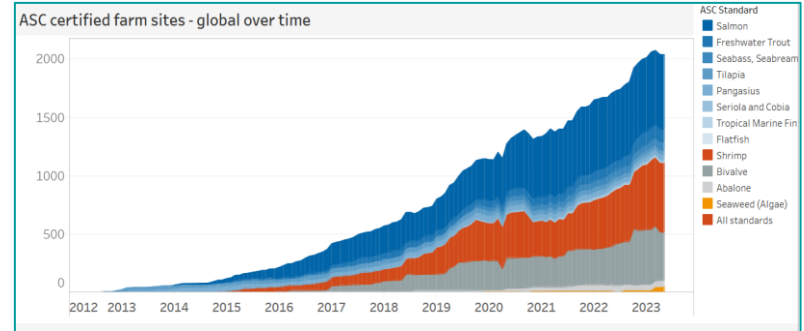
More than **25 000** ASC labelled products **in global markets** and growing year-on-year

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

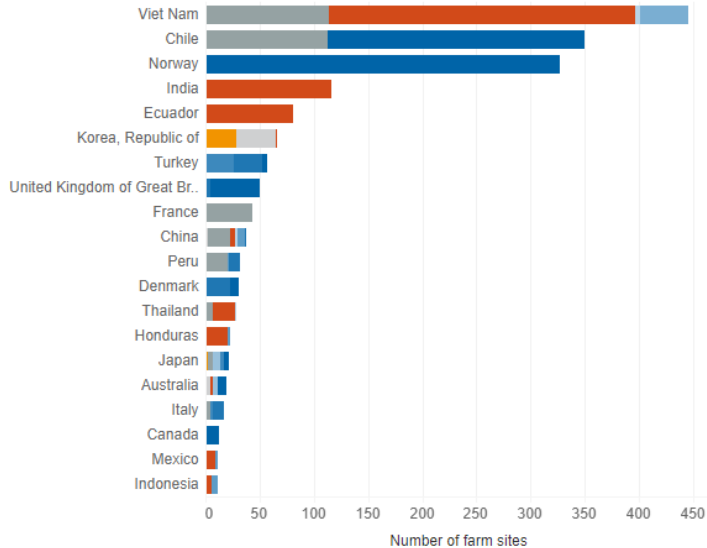


50 species covered, through **11** species-specific standards

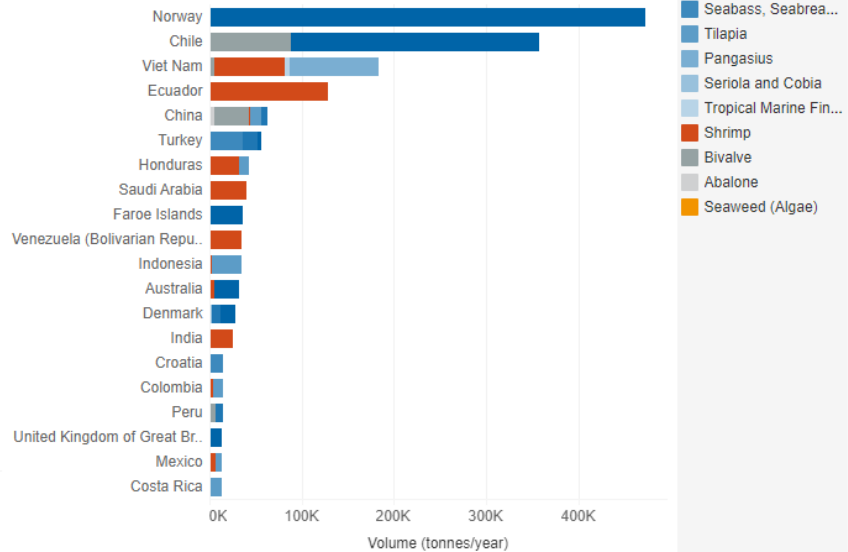
Farm sites and Volumes

- By Standard – Sep. 1st 2023

ASC certified farm sites - by standard, top 20 countries



ASC certified production volume - by standard, top 20 countries



Hvilken forskel gør ASC i praksis?

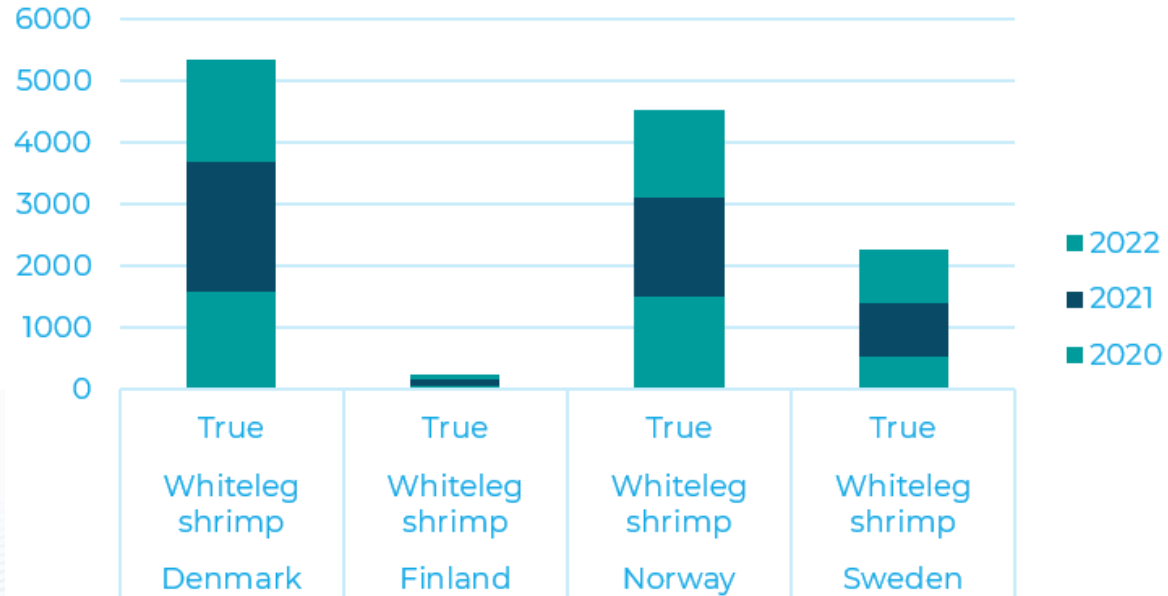
Et par eksempler...



Scampi

Volumes

Norden – consumer facing 2020-2022



The differentiating strengths of ASC – Shrimp

Robustness of benchmarks and impact monitoring



Respect local **regulations**



Minimize **environmental** impact



Respect **employees and local communities**



Animal Welfare

The use of antibiotics is strictly prohibited in ASC shrimp production. If a production is subject to antibiotic treatment the batch cannot be sold with the ASC label.



Water quality

Limits on chemical parameters (O₂, P, N) and particular attention to the risk of salinization and protection of groundwater



Habitat

Highest requirements to protect mangroves, wetlands and protected areas and species



Feed

Unique scope of the Feed standard: social and environmental criteria on all marine and plant raw material > 1%



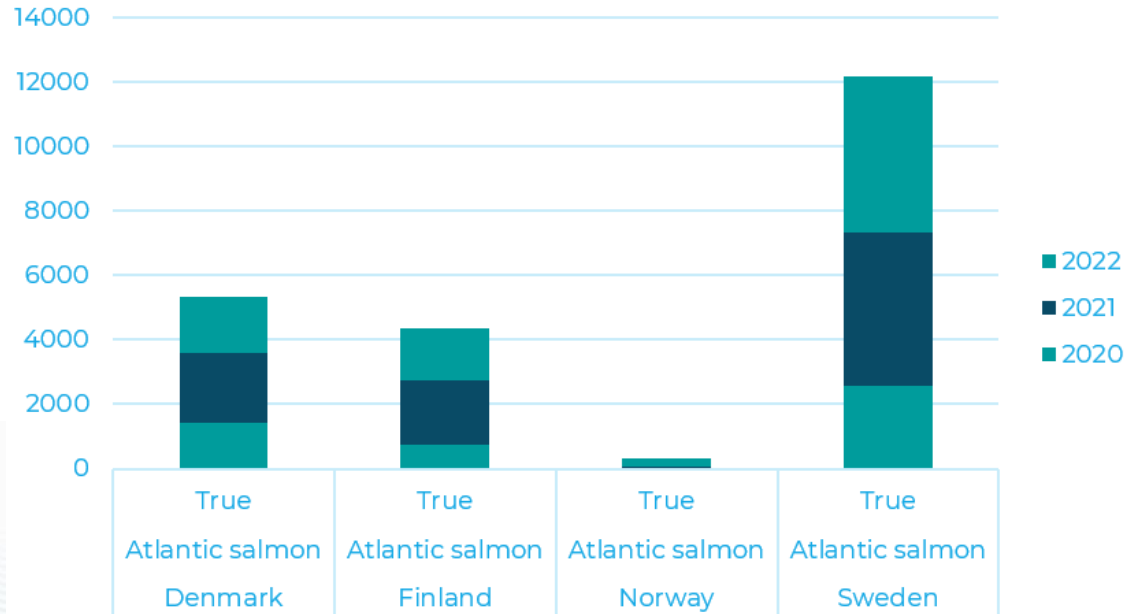
Social

Strict requirements to protect human rights: legal rights, no child or forced labour, fair wages, maternity leave, reduced working hours for childcare, engagement with local communities and indigenous groups

Laks

Volumes

Norden – consumer facing 2020-2022



Some comparisons ASC Salmon vs Norwegian legislation

Requirements

| | ASC | Norway |
|---|--|-------------------|
| Escapes | < 300 escaped fish per production cycle | No maximum |
| Forage Fish Dependency Ratio for Fishmeal FFDRm | < 1,2 (kg of wild fish per kg of farmed salmon) | Not a requirement |
| Responsible feed ingredients | Yes; requirement for responsible sources, aiming for certified sources; eg soy needs to already be 100% RTRS certified | Not a requirement |
| Number of antibiotics treatments during last production cycle | ≤ 3 times, demonstration of reduction if more than one treatment | No maximum |

Comparison ASC Salmon vs Norwegian legislation

Requirements

| | ASC | Norway |
|---|---|---|
| Regulation against using highly and critically important antibiotics for human health | Yes | No |
| Sea lice monitoring | <p>Weekly (in sensitive times when juvenile salmon migrate)</p> <p>Maximum the same as legislation, but immediate action required of farms to reduce sea lice levels in a specific time below thresholds; with serious consequences (product is not eligible to be sold as certified and the certificate shall be cancelled) if they don't achieve that</p> | <p>When the sea temperature is ≥ 10 °C: Weekly</p> <p>When the sea temperature is < 10 °C : at least every 14 days</p> <p><i>The requirement does not apply:</i> a) at sea temperatures below 4 °C b) at aquaculture facilities where the fish are to be harvested within 14 days</p> <p>Action limits: 1 January to 31 August: >0.5 adult female lice are detected by salmon lice or >three salmon lice of moving stages on average per fish.</p> <p>1 September to 31 December: >1 adult female lice are detected from salmon lice or >five salmon lice of moving stages on average per fish.</p> <p>Treatment must be completed no later than 14 days after exceeding of the action limit</p> |

Comparison ASC Salmon vs Norwegian legislation

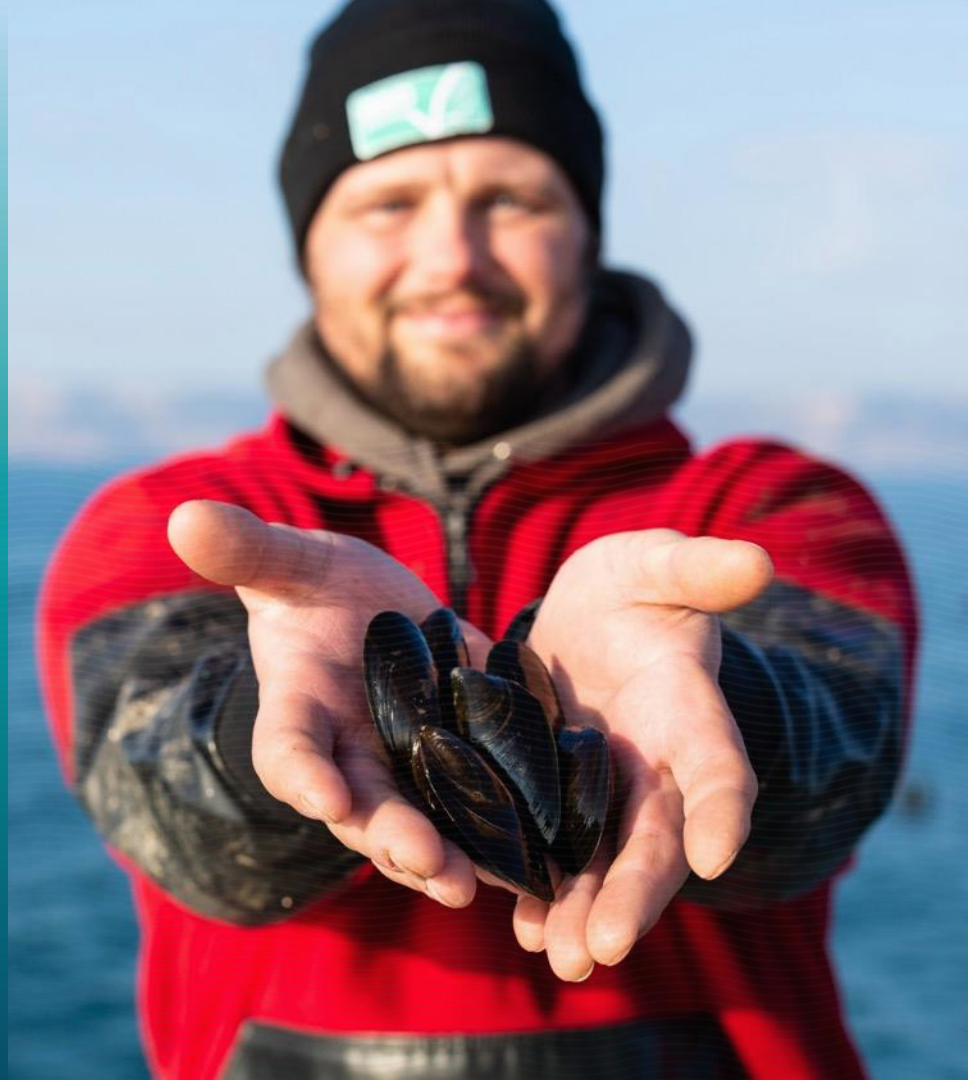
| Requirements | ASC | Norway |
|---|---|---|
| (Lethal) Incidents with wildlife | Every incident needs reporting Clear limit on mortalities over last two years: 9 in total (e.g. birds, max 2 mammals, no red-listed species) | No need to report Lethal interaction allowed if farmer has authorization |
| Use of acoustic deterrent or harassment devices | Not allowed | Allowed |

The Market

Consumer surveys, Opportunities and
inspiration



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Increased Market Demand...

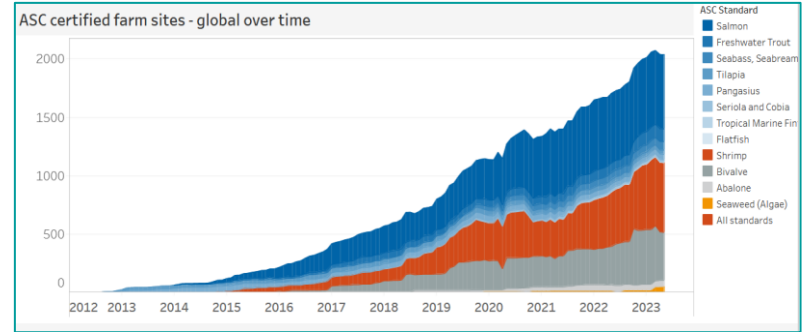
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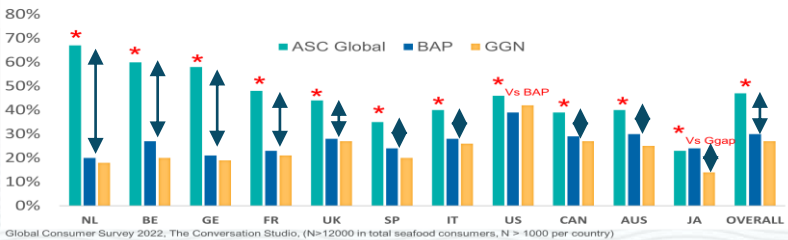
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Sustainability matters to consumers

- 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**.



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

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.



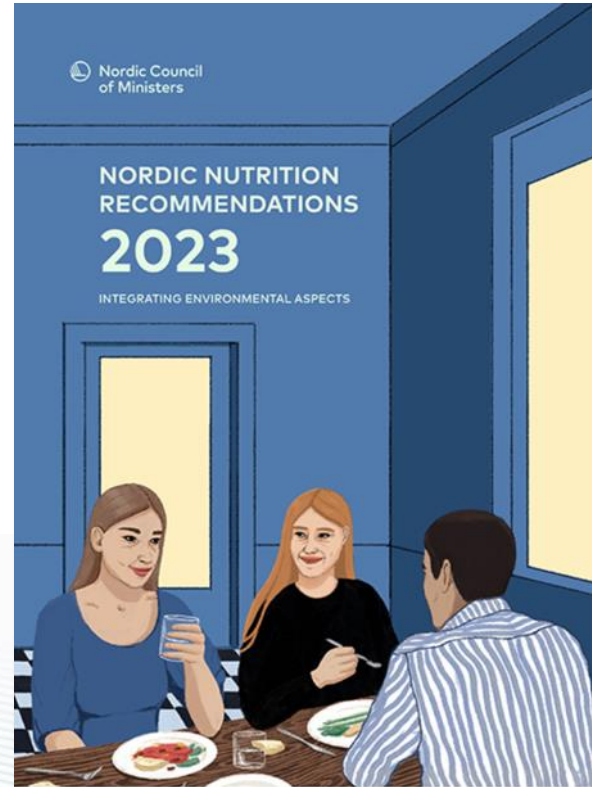
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Source: ASC Global Consumer Survey 2022

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.



ASC “Pausefisk”

A Nordic campaign for growing
consumer awareness of the ASC label



Setting The
Standard for
Seafood



Our October 2023 success:

‘ASC Pausefisk’

- 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



Our October 2023 success: 'ASC Pausefisk'

| When | Where | KPI | Results | Impressions |
|----------------|-------------------------------------|------------------|--|----------------------|
| 1-31 Oct. 2023 | Facebook, Instagram (Denmark) | 25% thumbstop | 70.96% thumbstop | 273,025 thumbstop |
| | | | 45.39% thru-plays (≥15 sec.) | 384,771 total |
| | | | 38.73% complete video plays (17 sec.) | |

The opportunity

Be one of the first retailers in Denmark 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



In-store aisle fins

Digital advertising

...& more

An open door for opportunity...



Phase 1:
Denmark (Pilot)
October 2023

Phase 2:
March/April 2024
October 2024

Tak for opmærksomheden!



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