

Meeting organic certification for finfish: a contrast of EU, Canadian and potential USDA standards

Melissa Rommens



Organic certification

- Environmental or natural resource protection
- Conserve biodiversity
- Maintain organic integrity
- Animal welfare
- Consumer's preferences

Organic certification

- Regulated in Canada, US, EU and internationally
– third party certification required




Why are we talking about « organic » at an Aquaculture Innovation Workshop?

- October 8, 2015 – Wegmans (Dulles): organic salmon imported from the EU selling at a 70% premium



DullesSearch Wegmans

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Wegmans Food You Feel Good About EU Organic Salmon - 1 Fillet

 5/5 

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Aisle/Location: Seafood


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BEST BEFORE
MEIL AVANT
2015.MA.25

NET WT
POIDS NET 1.150kg

UNIT PRICE
PRIX UNIT \$32.99/kg

ITM / ART. 47712



0 247712 037942

****SELL PRICE****
****PRX VENDANT****
\$ 37.94

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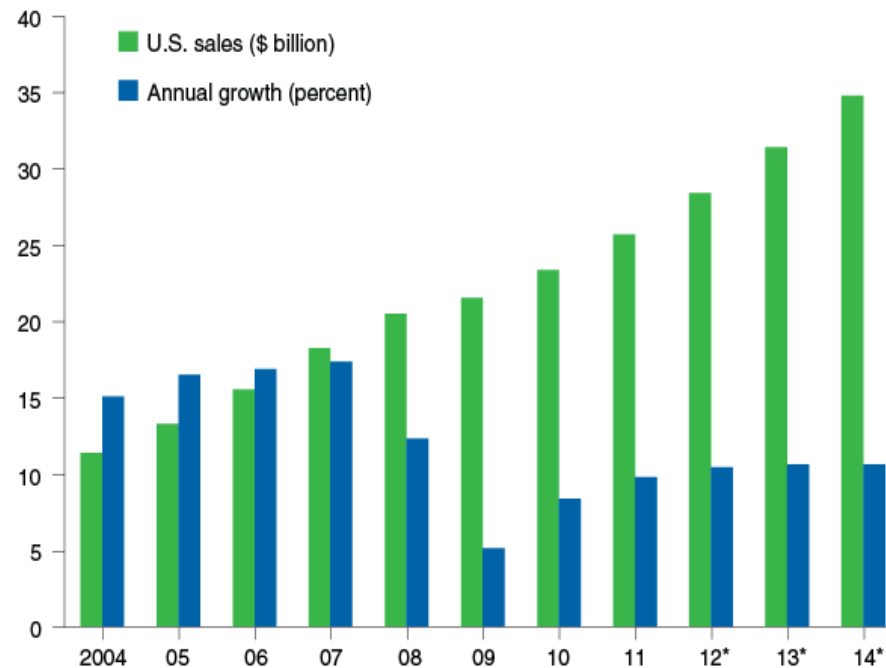


0 247712 037942

****SELL PRICE****
****PRX VENDANT****
\$ 37.94

Organic marketplace

- US market is large (\$35B, 43%), growing (10%) and potential for higher pricing



*Estimated.

Source: USDA, Economic Research Service using data from *Nutrition Business Journal*, 2013.

Organic certification for finfish aquaculture

- Private bodies (e.g. Naturland): 1995
- European Union (EU) Regulation: (2007) 2009
- Canada Voluntary Standard: 2012
- US: 2015?
- FAO*: ?

*Food and Agriculture Organization of the United Nations Codex Alimentarius

Comparison/contrast

- **EU:** Commission Regulation No. 834/2007, 710/2009, 1030/2013 and associated and supporting documents – not private labels
- **Canada:** CAN/CGSB-32.312-2012, CAN/CGSB-32.310 and associated and supporting documents
- **US:** Final Recommendations of the USDA NOSB* for Organic Aquaculture Standards (2010)

*NOSB= National Organic Standards Board

Primary differences

- Use of polyploid and monosex stocks
- Use of non-organic seedstock
- Use of land-based systems
- Stocking densities
- Feed
- Fish health treatment
 - Antibiotics
 - Parasiticides

Polyploid and monosex stocks

E.g. triploids for sterility; all-females (salmon, trout, halibut); all- males (tilapia)

- EU: No to both
- Canada: Yes to both (if no direct hormonal treatment)
- US: Triploid: No
Monosex: Yes (if no direct hormonal treatment)

Use of non-organic seedstock

No immediate access to organic seedstock - allowances for use of non-organic seedstock

- **EU:** 2/3 of production cycle (time) under organic management (phased out by end of 2015- maybe extension)
- **Canada:** 90% biomass gain under organic management
- **US:** 95% biomass gain or second day after metamorphosis under organic management + no prohibited substances in earlier stages

Use of land-based systems

Growing environment must promote the health and welfare of the animals and minimize stress

EU: -Yes to flow through*.
-No to RAS (except for hatchery and nursery)
-(Re-use under discussion)

Canada: Yes to all

US: Yes to all; back-ups required for RAS

EU position on RAS

710/2009: “(11) Recent technical development has led to increasing use of closed recirculation systems for aquaculture production, such systems depend on external input and high energy but permit reduction of waste discharges and prevention of escapes. **Due to the principle that organic production should be as close as possible to nature the use of such systems should not be allowed for organic production until further knowledge is available.** Exceptional use should be possible only for the specific production situation of hatcheries and nurseries. “

The technical working group of the EU (EGTOP) reviewed the allowability of RAS for organic production in July 2014.

Closed recirculated systems (RAS) have several environmental advantages, but **require significant input of external energy, high stocking densities (for economic reasons), advanced waste water treatment devices, use of UV radiation and use of pure oxygen.** All the above, together with the **disconnection of the aquaculture production from the external natural aquatic environment,** makes the closed recirculated systems (RAS) not in line with the principles of organic production.

Stocking densities

Stocking densities must maintain animal health and welfare, sufficient space for wellbeing

Species	Water System	EU	Canada*	US
Rainbow trout	FW flow through FW recirc	25 kg/m3 n/a	25 kg/m3. 60 kg/m3.	Stocking density should be appropriate for the particular species being produced to ensure animal health and overall well being
Salmon	FW flow through	20 kg/m3	20 kg/m3. (30 Coho)	
	FW recirc	n/a	60 kg/m3.	
	SW flow through	(Net pens) 10 kg/m3	40 kg/m3.	
	SW recirc	n/a	40 kg/m3.	
Arctic charr	FW flow through	20 kg/m3	140 kg/m3.	
	FW recirc	n/a	140kg/m3.	

*Other stocking densities may be considered if they meet water quality and welfare conditions

Feed

- Meet needs of fish
- Minimize environmental impact
- Organic fish meal and oil first choice
- Organic or non-synthetic pigments only
- Restrictions on feed additives

EU: -Wild fish meal and oil allowed (some restrictions)

Canada: -Wild fish meal and oil allowed (preferences)

-Intent to phase out non-organic components, but no timeline

-Max 80% action levels of contaminants.

US: -Wild fish meal and fish oil (restrictions)– to be phased out

Fish oil + meal maximums: 25% years 1-5, 15% years 6-8, 10% years 9-10, 5% years 11-12.

-Must be indicated on the label

Fish health

- Preventative health care practices
- Homeopathic
- Vaccination
- Listed approved substances

Antibiotics

EU: Limited*, not prohibited

- 1 max if <1 year, 2/yr max – unless compulsory eradication schemes
- Double the withdrawal
- Must be declared to certifying body (CB)

Canada: Not allowed* (contrasting statements within the standard)

US: Not allowed*

*Antibiotics cannot be withheld from sick fish

Parasiticides

Use of cleaner fish promoted and preferred

EU: Limited, not prohibited

- 1 max if <1.5 year, 2/yr max – unless compulsory eradication schemes
- Double the withdrawal
- Must be declared to CB

Canada: Limited, not prohibited

- One application <1 year, 2 applications max >1 year
- Must prevent – cannot be repeated

US: Contrasting statements on parasiticide use

Comparison/contrast

- Significant differences exist between the EU, Canada and proposed US standards
 - Who has driven/is driving the development of the standard?
 - Harmonization, equivalency agreements?

What does this mean for producers?

- Ability to use organic label in the US with EU or Canadian (or other) standards depends on the status of USDA organic standard for aquaculture
- If USDA standards absent:
 - Labelled « organic » but no USDA seal



What does this mean for producers?

- Consumers are paying a premium for organic salmon in the US without the USDA seal
- Some grocers will not sell without US standards (Whole Foods)
- American consumers prefer the « seal »

If you saw organic seafood in the store, which of these labelling terms would appeal to you **most**?

	New York	Boston	Toronto
Organically Grown	8.5%	4.6%	8.7%
Organically Farmed	7.1%	7.1%	6.5%
Organically Cultured	0.6%	2.0%	2.2%
Naturally Produced	12.4%	13.3%	16.8%
Organically Aquacultured	2.4%	2.0%	6.5%
Certified Eco Friendly	4.7%	7.1%	7.1%
Certified Organic	25.7%	26.0%	33.7%
USDA Organic	32.3%	31.6%	9.2%
None of the above	6.3%	6.1%	9.2%

What does this mean for producers?

- If USDA standards present
 - For importers:
 - Will require an equivalency agreement between US and EU/Canada
 - If no agreement, must meet US standards
 - For US producers:
 - Must meet US standards

Organic food industry gaining influence in U.S.

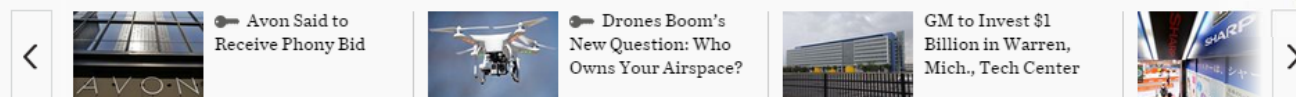
↑ DJIA 18237.92 0.98%	↑ Nasdaq 5042.59 1.22%	↑ U.S. 10 Yr 8/32 Yield 2.247%	↓ Crude Oil 59.85 -1.07%	↑ Euro 1.1394 0.35%	EXP
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Hunger for Organic Foods Stretches Supply Chain

Nature's Path buys cropland, while Chipotle provides financing for farmers

By [ILAN BRAT](#)

Updated April 3, 2015 5:45 p.m. ET

Last year, executives at organic cereal maker Nature's Path Foods Inc. grew so frustrated with organic-grain shortfalls that they took a radical step: They bought a farm.

The three-decade-old Canadian company plunked down more than \$2 million for 2,800 acres of Montana cropland, part of an effort to seize greater control of its supplies of wheat, oats and other



Trend towards natural, organic products strengthening frozen food market in 2015 and beyond

January 26, 2015 No Comments

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