



# Working group 1

## Markets, demand & trade

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# Market intelligence and prospective market analysis



– Clearer analysis of the structure of the emerging/projected demands

–Can we disaggregate the expected demand – how much is going to be low value, high value, fresh, processed from mariculture from freshwater etc.?

–Can we tell where these parts of the markets will be ? Which countries?

–**Analysis** by INFOFISH published as forward view of aquaculture.

–**Specific country studies** – very high diversity of products and markets at national level – generic analysis is not informative enough, as to where true opportunities lie.

–Specifically – where is the demand going to come from and what is the demand for (socio-economic groups, cities/rural, high value products/cheap products

# Specific information on China (sector study)



- Trends
- Markets
- Regulation
- Etc.

- **Mariculture sector study**

## Facilitate closer cooperation/contact between producers and traders.



<ul style="list-style-type: none"> <li>- Knowledge of who produces what where is valuable</li> <li>- Lack of knowledge of marketing and transportation channels</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Information system</b></li> <li>- <b>Between country contact</b></li> <li>- <b>Lists of producer groups/commodities available</b></li> </ul>
<p>-A wide range of derivatives from maricultured products exist and remain to be explored. Markets for these already exist, the supply demand connection has not been adequately developed. Considerable opportunities exist for diversifying production systems, or developing/introducing methods for their extraction.</p> <p>-Nutraceuticals, Feed additives, Pigments, Biopolymers, Lipids, Proteins, Bio-active compounds</p>	<p>-Link to agricultural research institutions that are developing these products and their applications</p> <ul style="list-style-type: none"> <li>- need to link this to the supply end. Focus would be identify what they are looking for and try and see where the raw products and (possibly primary processing) could be done</li> </ul> <p>-Partners in this would be NACA, SEAPLANTNET, FAO, possibly ACIAR....others?</p>

# Quality Safety Traceability



- Harmonization will be key (with international standards and possibly inside the region)
  - ASEAN ongoing work for processors
    - take it to the production level
  - Thai IT system for tracing shrimp from COC/GAP farms to processors - newly installed.
  - Thai road map for food safety
  - NAFIQAVED tracing system
  - Feed testing – contamination/residues
- **Review & summary** of the COC/GAP/BMP systems for the region.
  - **Initiate** move towards a basic set of principles from which more specific commodity or system principles or standards could be developed.
  - **Harmonization of traceability/safety** systems with the needs of importing countries
  - **Awareness raising/training course** for safety and quality, linking the various national initiatives at commodity level or sector level.
  - **Assistance with training in detection/analysis – laboratory standardization.**

## Approved list/guide on therapeutants for mariculture and the emerging issues for health and safety



- AGM health group comes up with specific veterinary guide of diseases & allowed, therapeutants.
- Other contaminants and residues.

- **Specific working activity of AG Health**
- Agreed list & awareness brochure.
- Watch list.

# Coastal monitoring systems [environmental monitoring, environmental quality, red tide]



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|---|--|
| <ul style="list-style-type: none"><li>- Thailand (red tide, heavy metal, water quality)</li><li>- Vietnam,</li><li>- RO Korea (on-line system)</li><li>- Hong Kong</li><li>- Who is responsible</li><li>- For what purpose: food safety (e.g. mollusc closures) or for protection</li></ul> | <ul style="list-style-type: none"><li>- <b>Review</b> of the coastal environmental monitoring systems of the region</li><li>- <b>Joint workshop</b> on agreeing major factors &amp; issues for mariculture zoning and environmental monitoring. ( include feeds into labeling below)</li></ul> |
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# Certification /labeling Eco-labeling



- Wild versus farmed – how to distinguish?
  - Quality products – what criteria?
  - Common standards – can we get consensus?
  - Compliance with international standards -
  - FAO/MSC eco-labeling of capture fisheries
  - MSC eco-labeling live reef fish
  - Nature Conservancy/WWF guidelines for live fish
  - MAC standards (aquariums)
  - National programmes – China, Thailand, Malaysia, Hong Kong, India
  - GAA principles adopted by WalMart
- **Pilot activity** on labeling according to emerging BMP for some specific pilot sites/commodities.
  - **Initiate dialogue** towards the emergence of specific commodity (or system-based) BMP's: (see above)
  - *e.g.*
  - *BMP cage mariculture*
  - *BMP mollusc mariculture*



# Regional standards for single commodities



– Some commonly agreed baseline standards for “big ticket” commodities produced in the region for sale into other markets (e.g. EU/USA).

– **Expert consultation** on one or two key species for setting out some baseline standards for production and quality.

## Addressing importing country concerns/demands & changing consumer awareness / preference



- Using the FAO/NACA/WWF/WB Shrimp Consortium model – are there grounds for cooperation to improve awareness of:
  - Mariculture products
  - Marine product issues
  - Common BMP standards
- **MOU between partners** developed for a consortium model with institutions to start developing issues based awareness and information on principle mariculture areas – linked to BMP development for specific mariculture systems
- **Potential Partners:** NACA, FAO, WWF, SPC, SEAFDEC, UNEP, NC, Others? MSC,MAC etc.

# Access to finance for mariculture



- APRACA has contact with national level finance institutions
- FAO/APRACA has already done some work here for inland small-scale, fisheries.
- Financial risk analysis,
- Thai Seafood bank concept
- With larger scale mariculture aquaculture operations – there will be increasing interest in insurance (possibly for farmers who are organized and under BMP schemes).

- Analysis** - Initiate some financial analyses of risk versus income for aquaculture financing – can this be linked to BMP?
- Engaging with financial institutions** (through dialogue with APRACA)