



World Seafood Congress 2015

Upskilling for a Sustainable Future

Grimsby, England
5th to 9th September 2015



Timothy Hansen

U.S. Federal Government Retired and President
IAFI 2014-2015



Breakout Sessions:

Trade – 2nd floor – Lecture Theatre 2H09

Upskilling – Plenary/Main Hall

Sustainability – 2nd floor – Lecture Theatre 2H16

There is a lift and stairs from the Atrium which leads to the 2nd floor.

WiFi:

You have access to free WiFi and the code is WSC2015

Logistics about Grimsby University:

Smoking:

Grimsby Institute operates a strict NO SMOKING policy. Smoking is only permitted outside and in the designated smoking area which is accessed via the marquee. This policy also applies to Electronic Cigarettes (“e - Cigarettes”) and other similar devices

Prayer Room:

If you would like to use the Prayer Room, please speak to a member of the team at the registration desk who can assist you

Access around the Campus:

As there are students in and around the University Campus, it is important that you keep within the confines of the Congress area



Photographs:

No photographs can be taken outside due to student security

First Aiders:

If you or one of your fellow delegates requires any medical assistance, please contact the registration desk. The First Aid Room is located next to the registration desk

Cloak Room:

There is a Cloakroom in the Atrium

Fire Alarm:

In the unlikely event of the fire alarm sounding, please make your way to the nearest fire exit and your fire wardens will advise you where you to go

Dinners:

There will be two off-site dinners arranged by prior booking. Timings are listed below:

Seafood Fayre – Monday 7th September – Humber Royal Hotel from 7-11pm

Gala Dinner – Tuesday 8th September – Humber Royal Hotel from 7-11pm

If you have any questions, please feel free to speak to the team on registration







Dr Paul Williams

CEO, Seafish





Tanya Arkle

Director of Marine, Department of Environment
Food & Rural Affairs (DEFRA)





Global seafood utilization and trade: Challenges and Opportunities

11th World Seafood Congress

Grimsby, U.K

6 – 9 September 2015

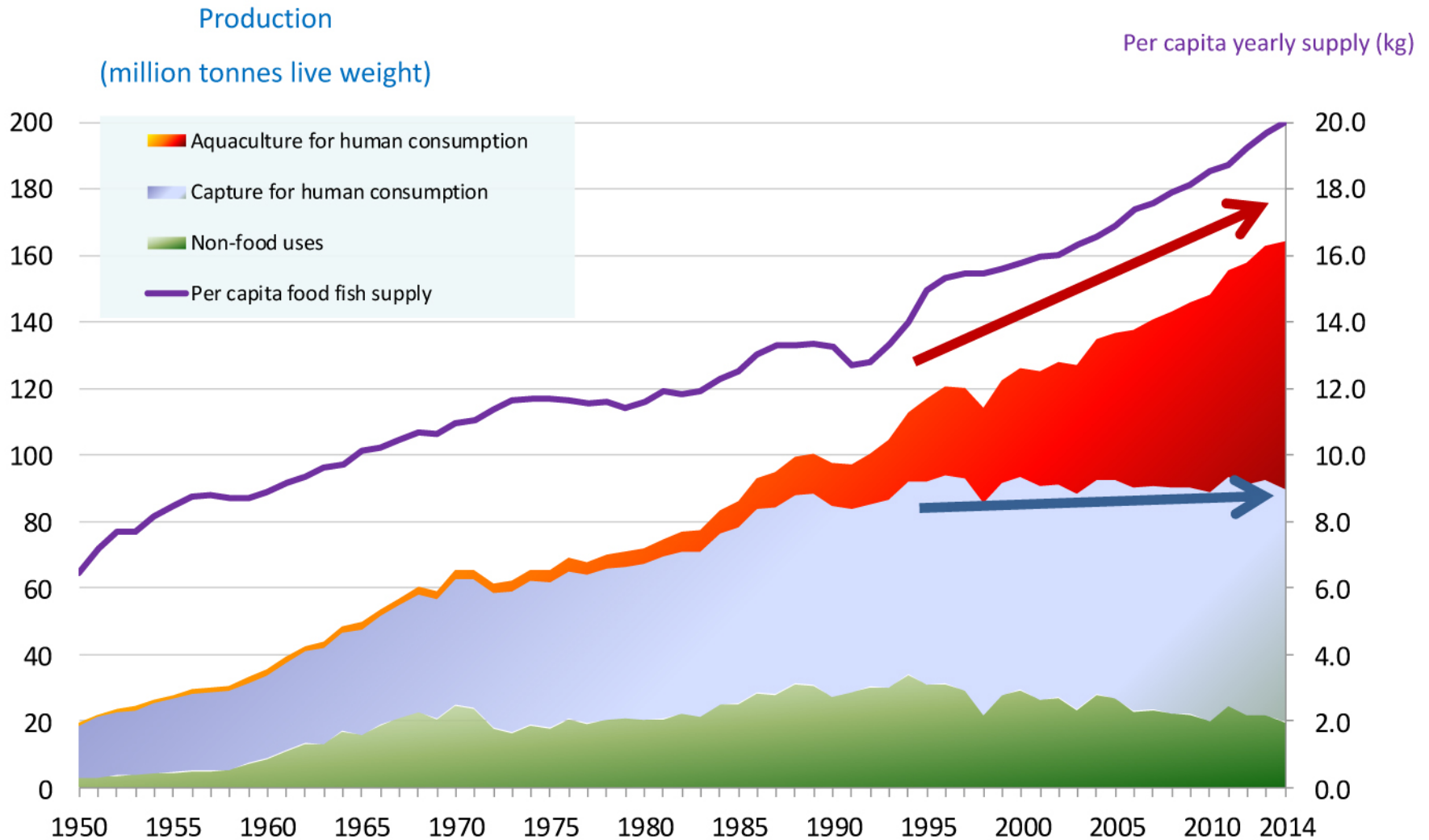
Lahsen Ababouch

Director, Policy and economics division.

Department of Fisheries and Aquaculture

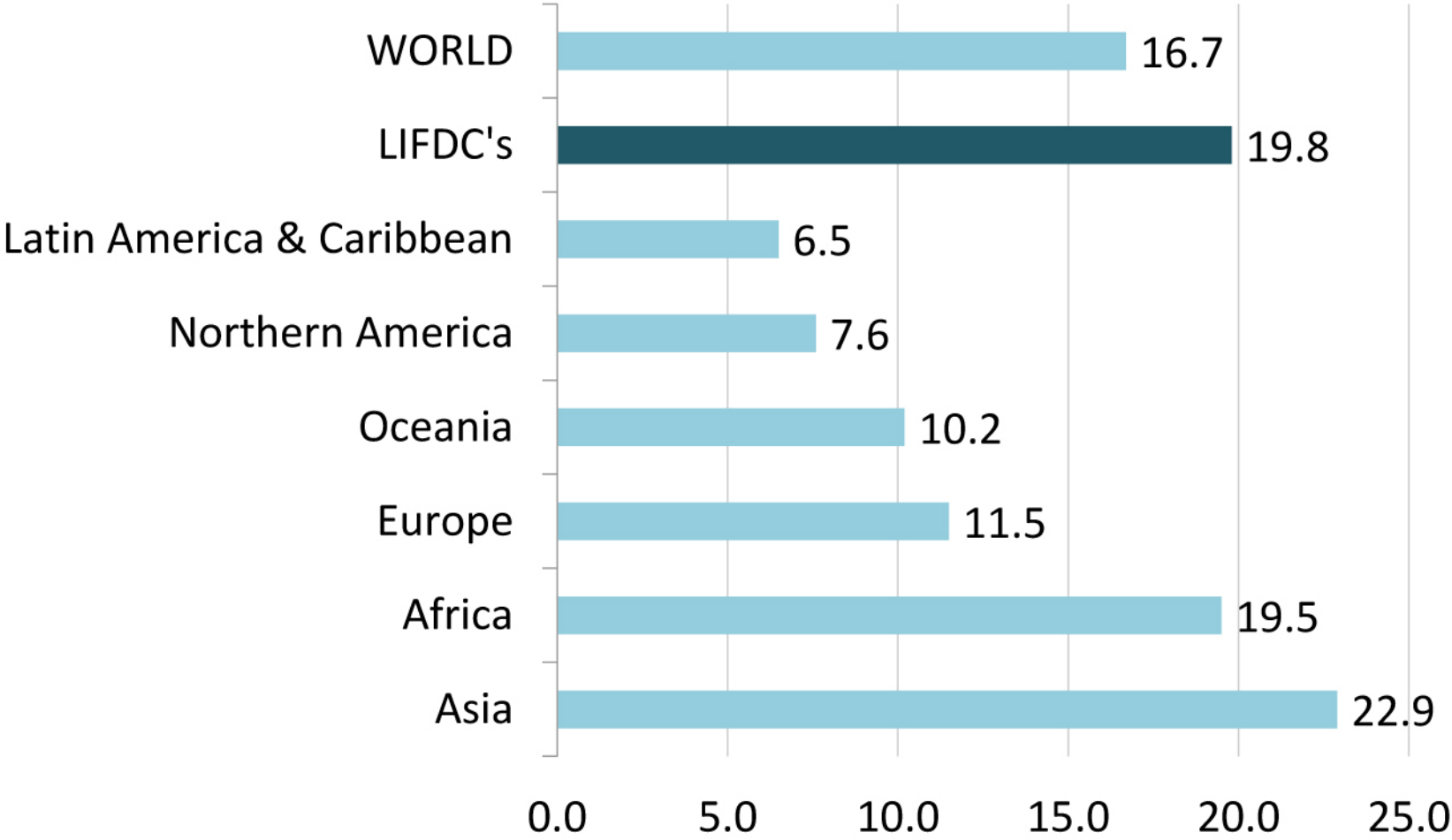
**Food and Agriculture Organization of the United
Nations. Rome, Italy**

Production and Utilization



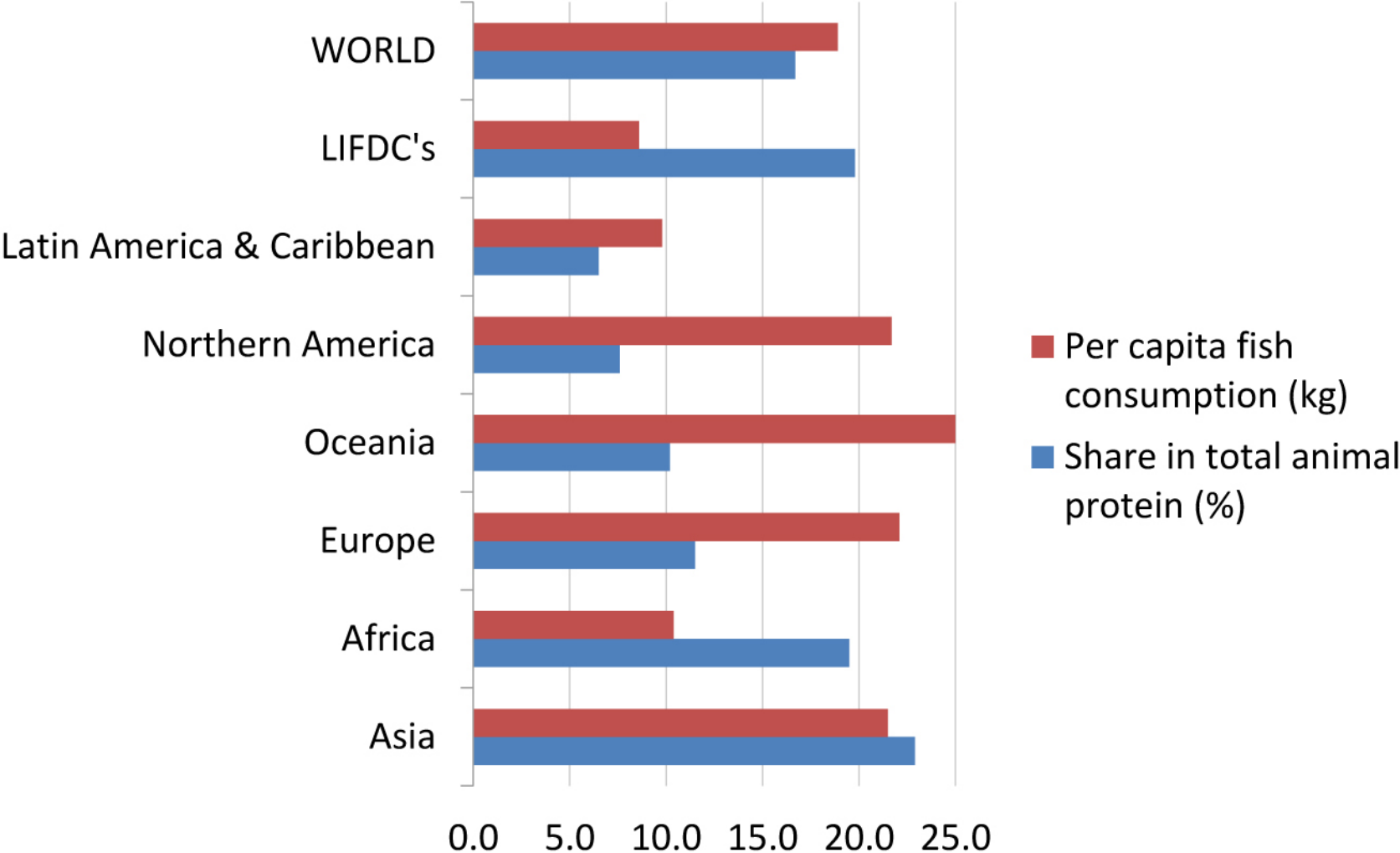
Note: Data referring to 2014 should be considered as preliminary.

Contribution of fish to human diet (2011)



Fish as percentage of total animal protein intake

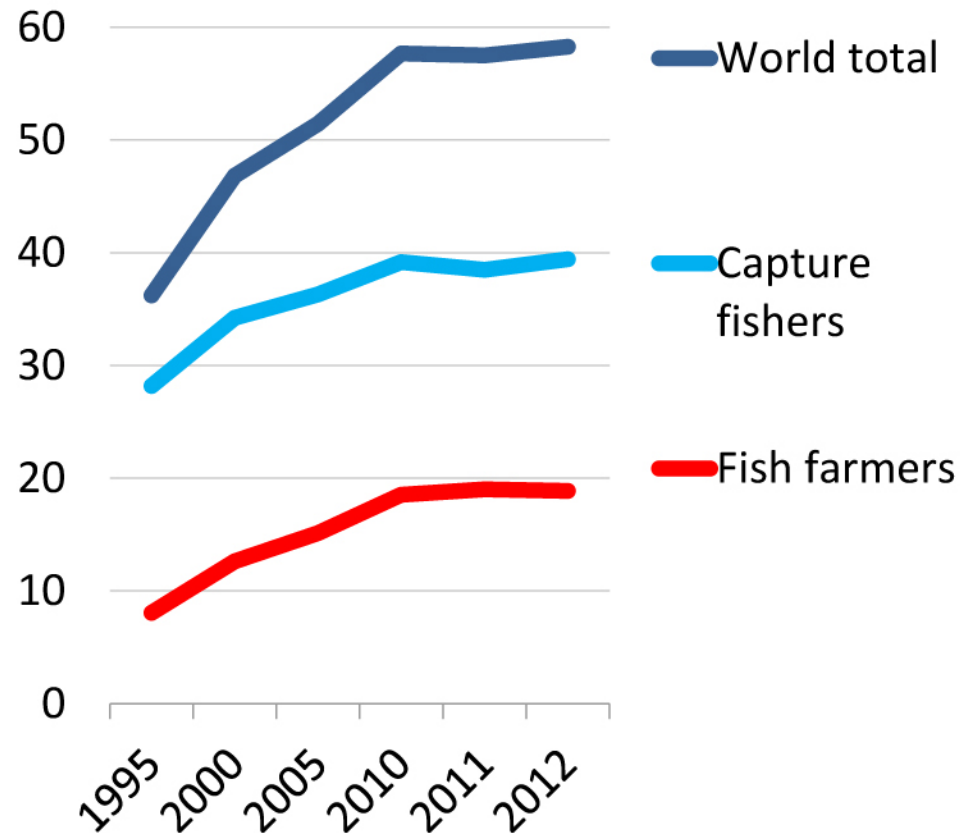
Contribution of fish to human diet (2011)



Employment & Livelihoods

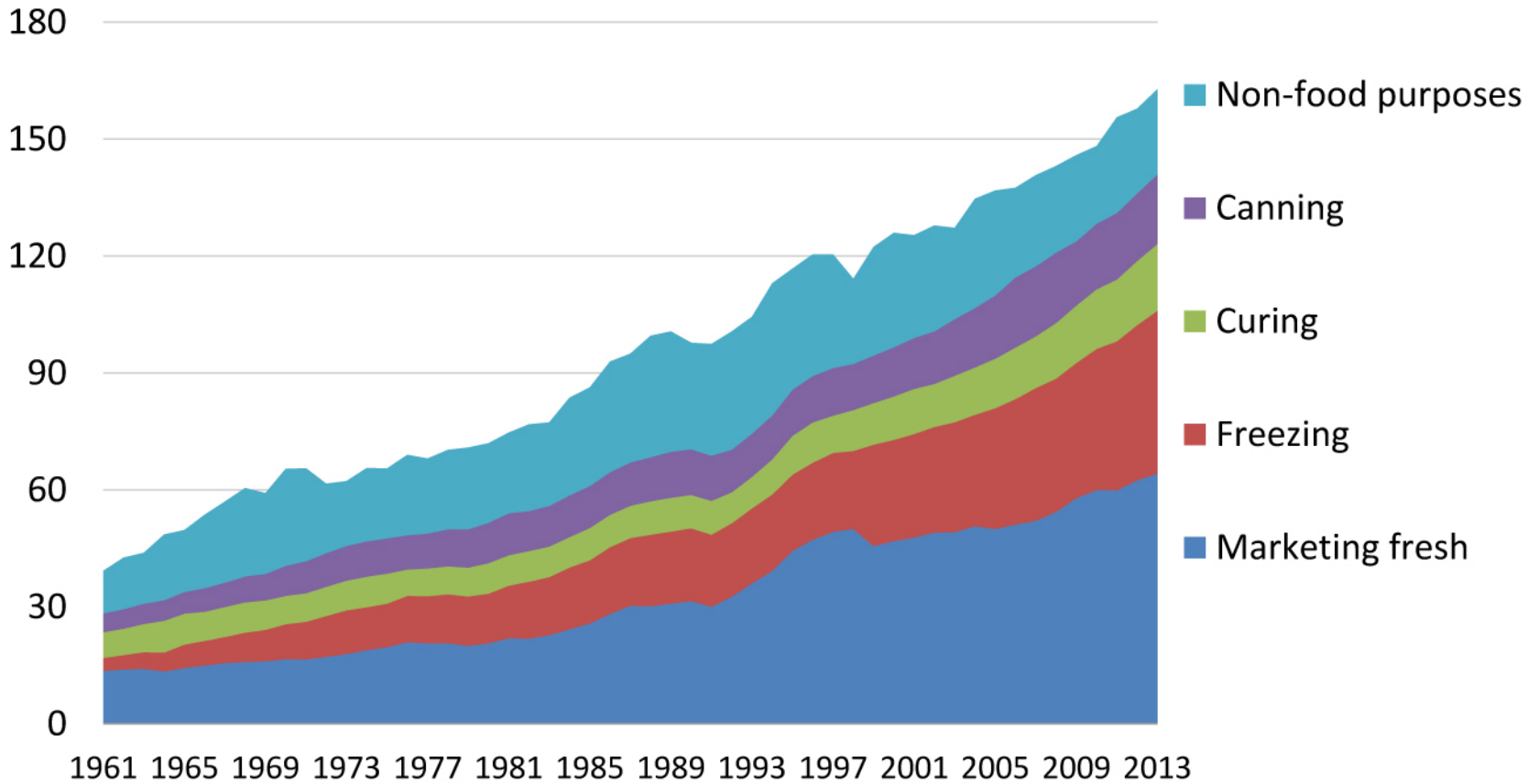
Primary sector:

- 58.3 million total employment (2012)
 - 90% small scale
 - 39.4 million capture
 - 18.9 million aquaculture



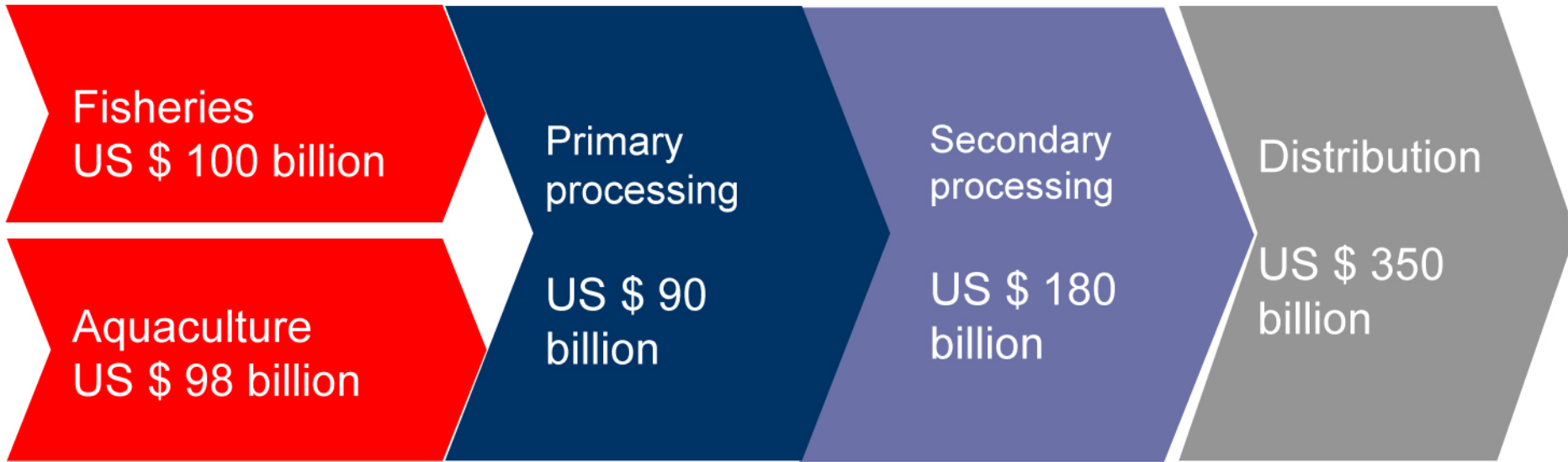
Fish utilization

Million tonnes



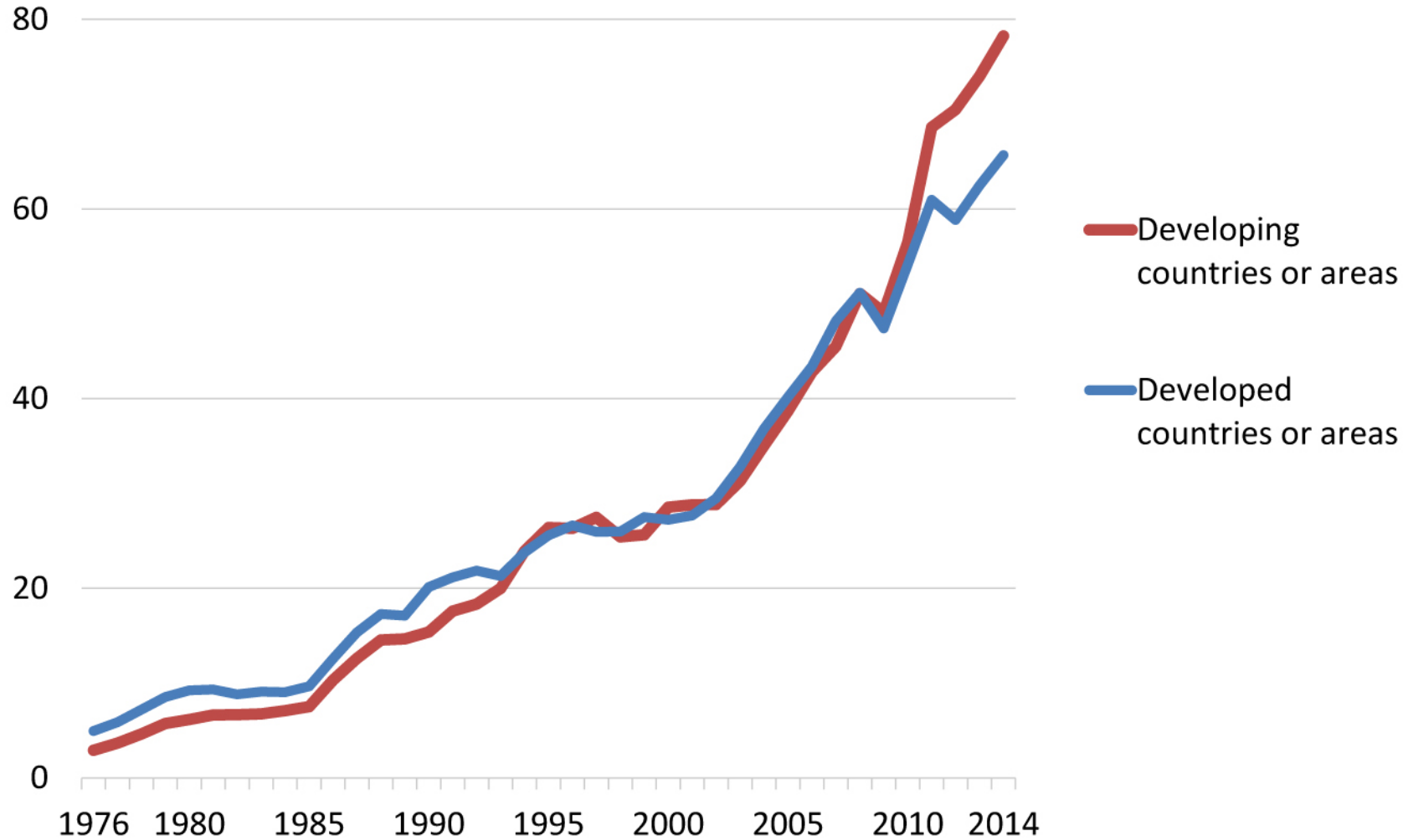
Socio-Economic importance of the fish and seafood value chain

Estimated Total Value 818 US \$ billion in 2008



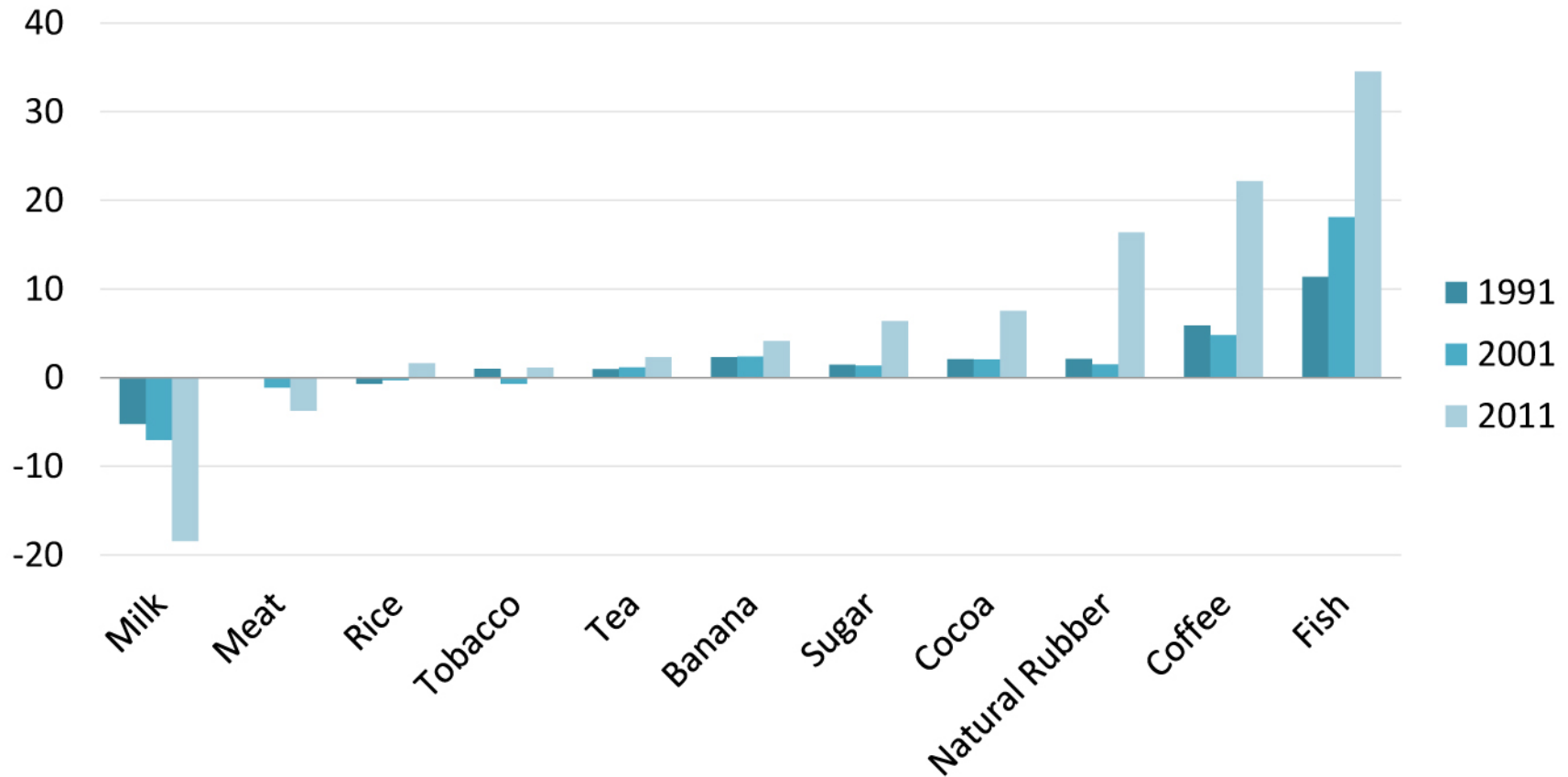
Exports of fish and fishery products

USD billions

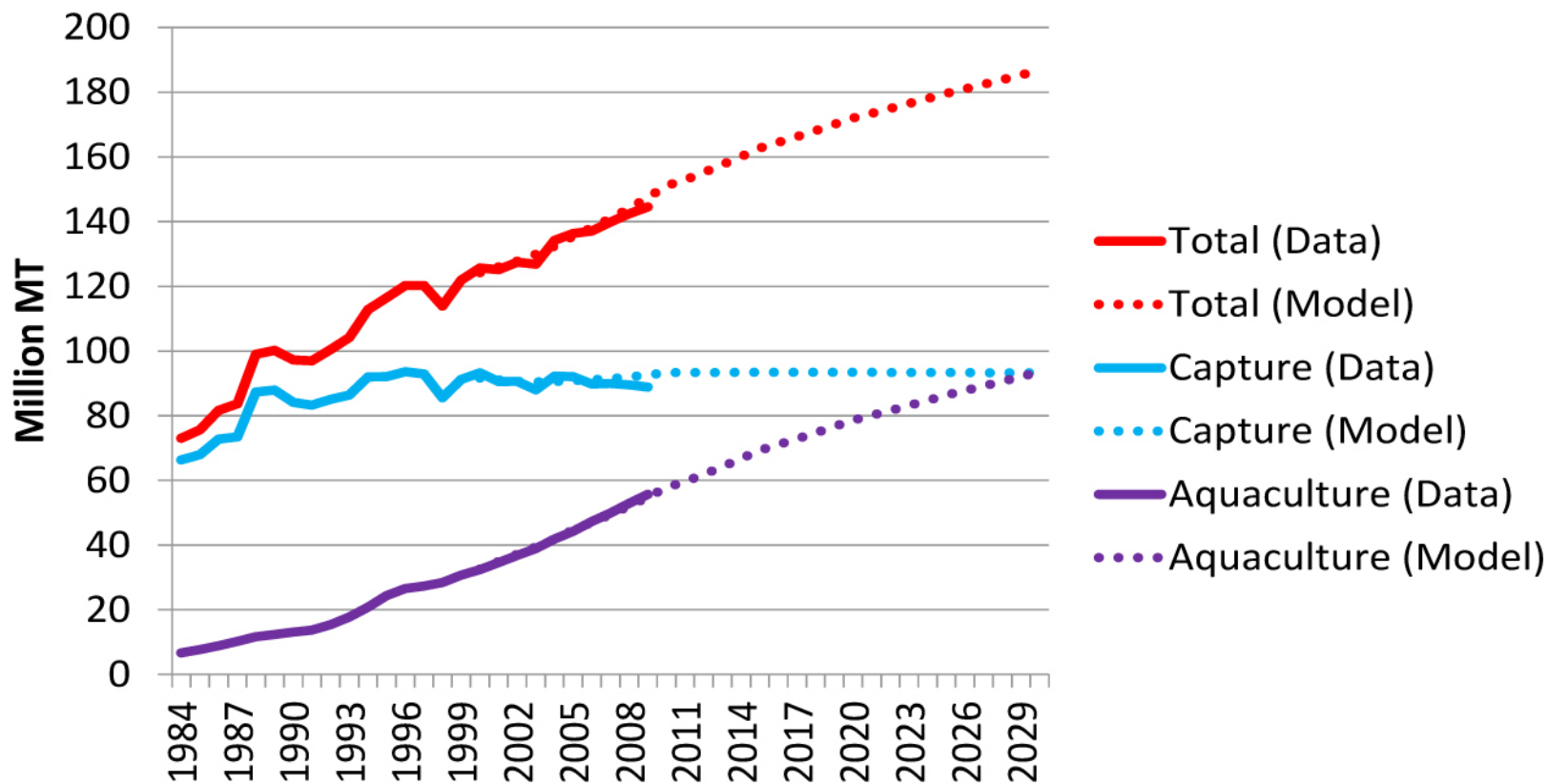


Net exports of developing countries

US\$ billions



Global fish production: Data and projections (1984-2030)



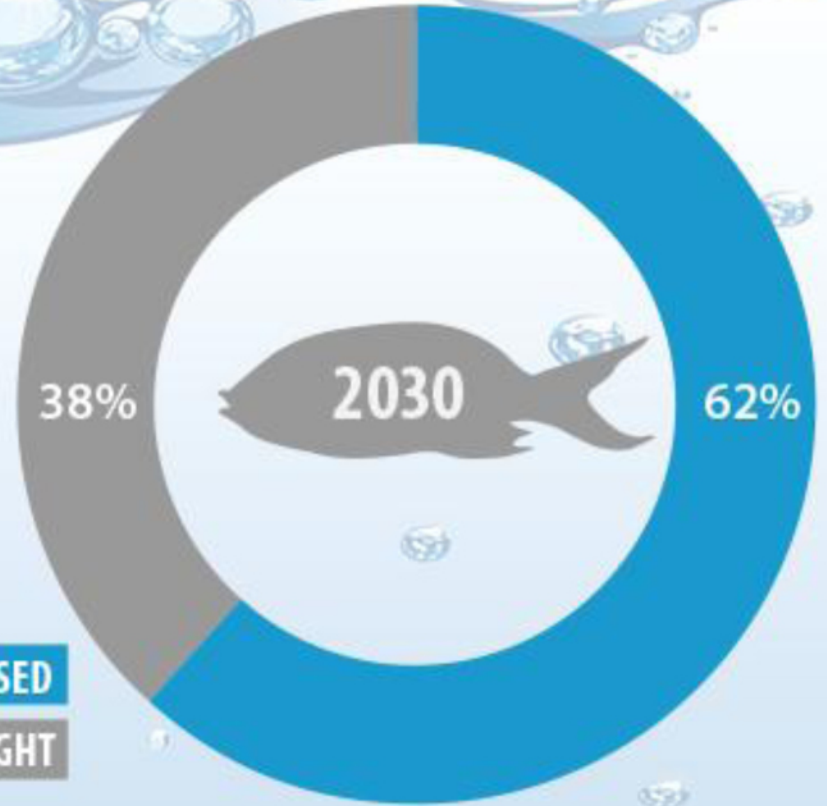
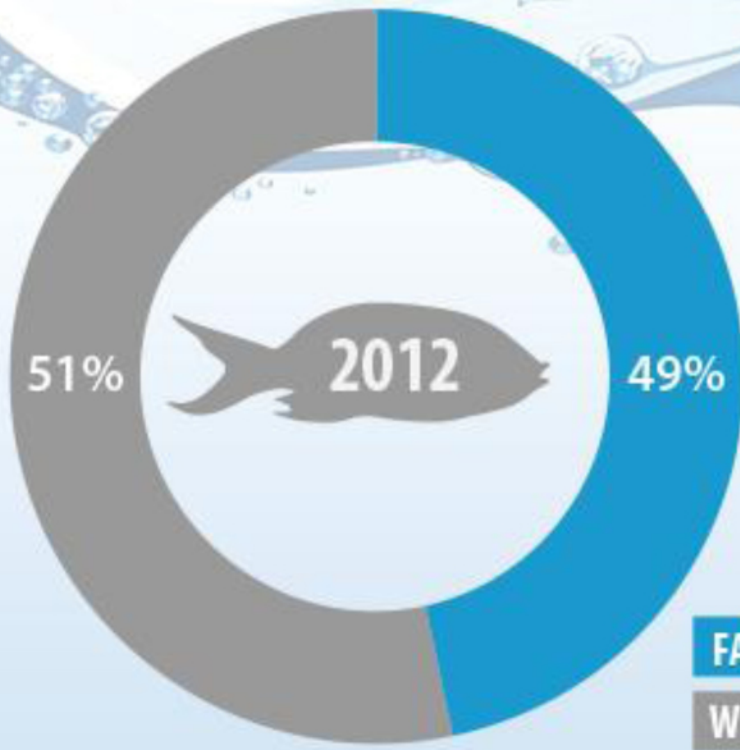
Source: FISH to 2030

GLOBAL SEAFOOD CONSUMPTION

NOW

VS

FUTURE



FARM RAISED
WILD CAUGHT

Sources: FAO FIPS (2014) // Fish to 2030 (2013)

#Fish2030

Challenges

Decreasing resource base:

1. Overexploited fish stocks
2. IUU fishing
3. Overcapacity in fishing fleets
4. Degraded environment and ecosystems
5. Climate Changes
6. Post harvest losses

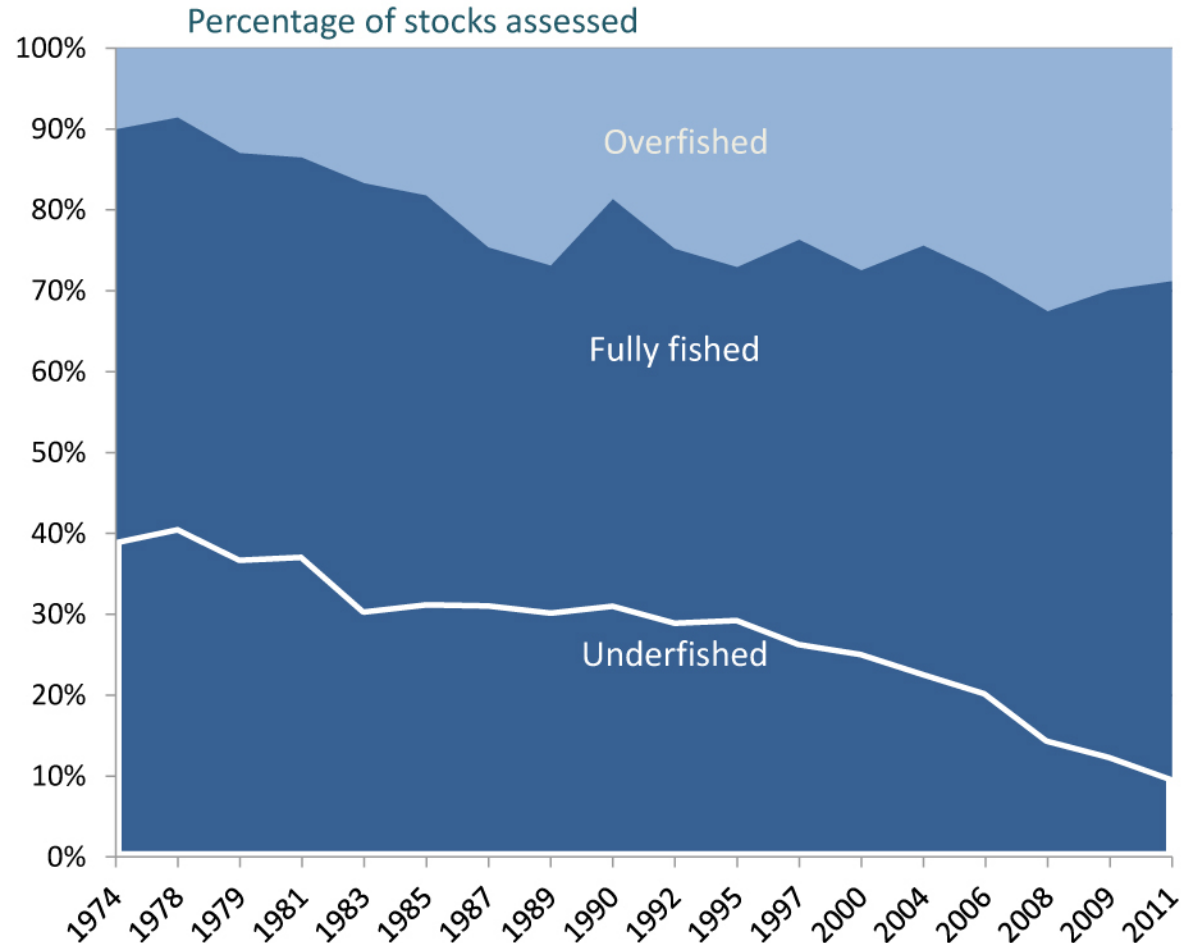
Increasing demand:

1. Population increase
2. Economic development
3. Increased consumption



Stock Status of Marine Fishery Resources

- ✓ **28.8% of overfished stocks in 2011**
- ✓ **71.2% of stocks fished within biologically sustainable levels**
- ✓ **Constant increase of the % of fully fished stocks since 1990**



“Corporate social responsibility”

- **Legality (IUU)**
- **Sustainability**
- **Certification**
- **Eco-labelling**
- **Tracability and chain of custody**
- **Social and Environmental aspects**

The FAO Blue Growth Initiative

Blue Growth Strategy

Ongoing

Indonesia
Mauritania
Morocco
Algeria
Senegal
Gabon
Seychelles
Madagascar
r
Cabo

Pipeline

Near East
Region*
Kenya
Mozambique
Bangladesh
Côte d'Ivoire
Gulf of Guinea*
Pacific*
Iran (Republic of)

Ongoing

Indian Ocean*
East Africa*
Namibia
Senegal
Cabo Verde
Kiribati
Philippines
Saint Lucia

Pipeline

Ecuador
Ghana
Angola
Morocco
Thailand

Livelihoods and food systems

Aquaculture

Ongoing

Bangladesh
Sri Lanka
Viet Nam

Pipeline

Indonesia
Philippines

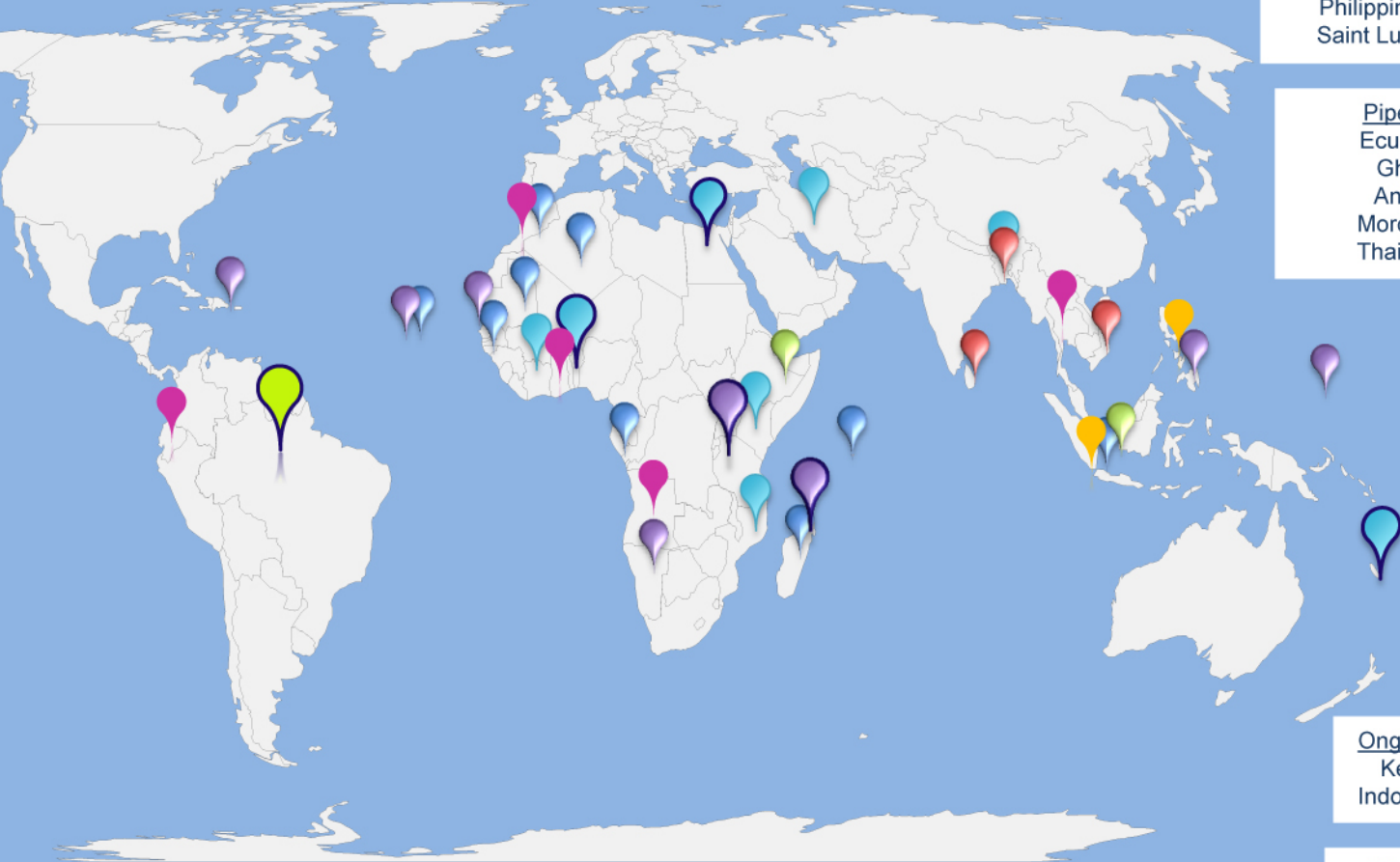
Ongoing

Kenya
Indonesia
a

Pipeline

Amazonia
*

Ecosystems services



Near East Region
Gulf of Guinea
Pacific

Indian Ocean
East Africa

Amazonia

* Regional work

Definition

Blue Growth is the sustainable growth and development emanating from economic activities in the oceans, wetlands and coastal zones, that minimize environmental degradation, biodiversity loss and unsustainable use of living aquatic resources, and maximize economic and social benefits

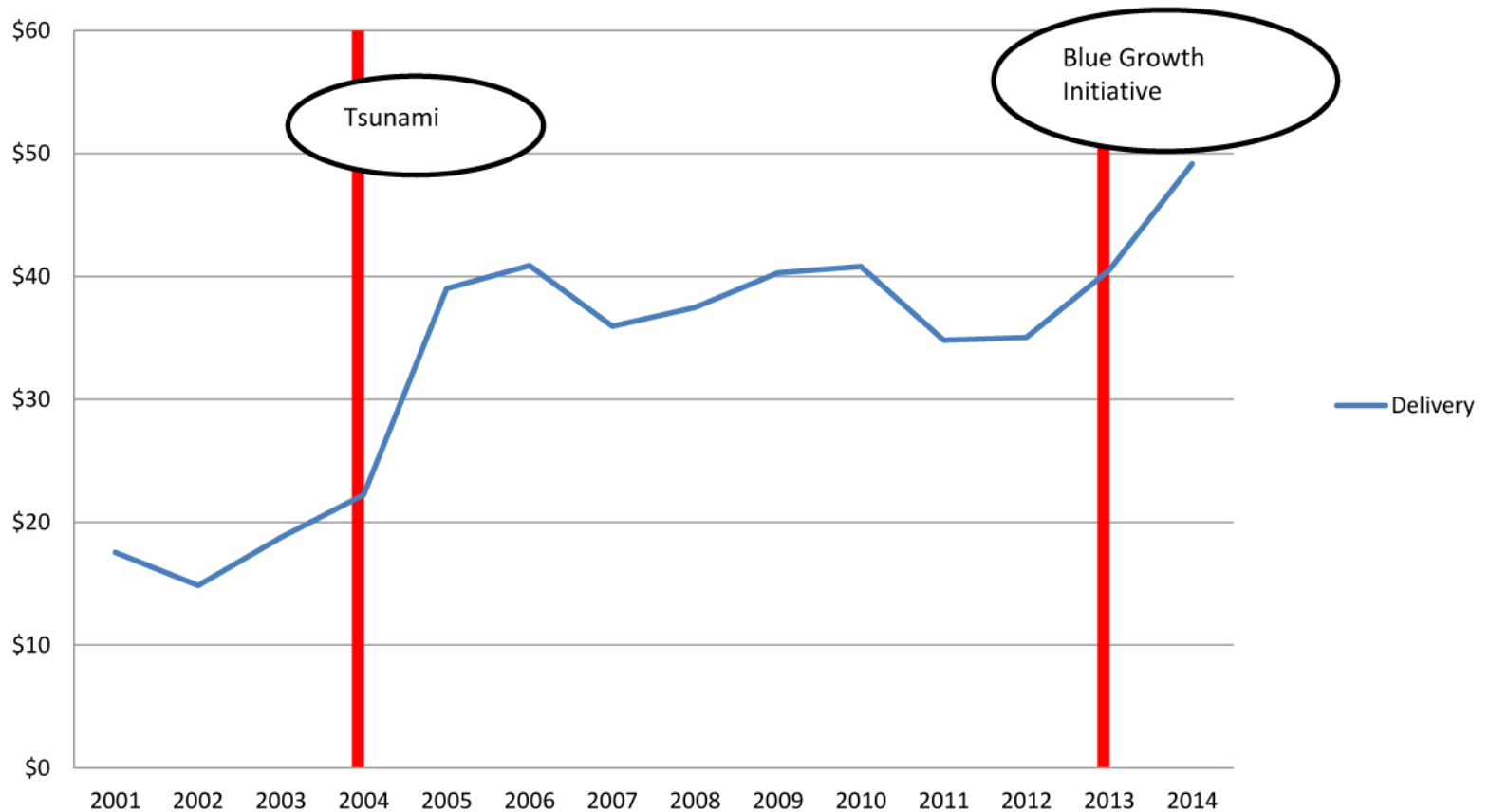
Advocacy

- ❖ **Rio + 20 (Rio de Janeiro, 2012)**
- ❖ **1st Global Summit on the Blue Economy (UAE, January 2014)**
- ❖ **World Action Summit on BG and Food security (The Hague, Feb 2014)**
- ❖ **SIDS Conference (Samoa, September 2014)**
- ❖ **Blue Growth Global Action Network (Grenada, March 2015)**
- ❖ **World Ocean Summit (Lisbon, June 2015)**
- ❖ **Our Oceans Conference (Valparaiso, Chile. October 2015)**
- ❖ **Post 2015 Sustainable Development Goals SDG**



Corporate Area for Resource Mobilization

Delivery 2001-2014 in USD Millions



The FAO Blue Growth Initiative

Blue Growth Strategy

Ongoing

Indonesia
Mauritania
Morocco
Algeria
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Seychelles
Madagascar
r
Cabo

Pipeline

Near East
Region*
Kenya
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Livelihoods and food systems

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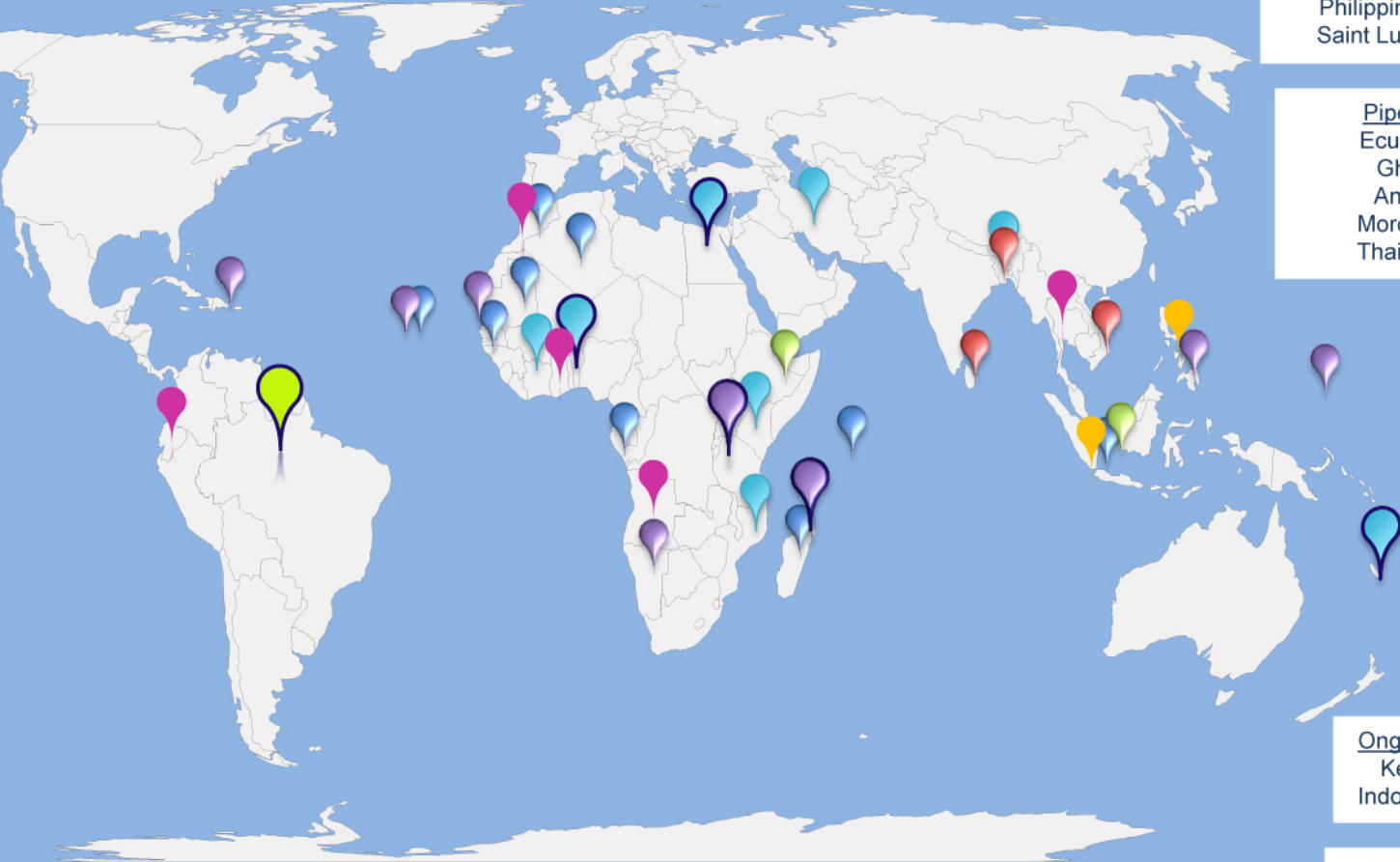
Ongoing

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Pipeline


Amazonia
*

Ecosystems services



 Near East Region
Gulf of Guinea
Pacific

 Indian Ocean
East Africa

 Amazonia

* Regional work

شكراً!

谢谢!

Thank you!

Merci!

Gracias!

Спасибо!

Lahsen.ababouch@fao.org

Lahseno.org





UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

World Seafood Congress 2015
Grimsby, UK

Sustainable Value Chains and Food Safety in Fisheries



**A Contribution to the
Sustainable Development Goals**

Steffen Kaeser

UNIDO Keynote
7th September 2015



Sustainable Development and Food Safety

HOW SAFE IS YOUR FOOD?



Food processing



Packaging



Point of sale



Preparation:
consumers

From farm to plate,
make food safe

WORLD HEALTH DAY 2015
#safefood



World Health
Organization



*“We all have a
role to play in
keeping food
safe – from farm
to plate and
everywhere in
between.”*



Food Safety and Inclusive and Sustainable Industrial Development (ISID)

Increased food safety contributes to the **reduction of food waste** and thus contributes to **food security**.

Inclusive upgrades of food value chains entail an equitable distribution of **additional income** across large numbers of **poor households**.



**Social
Inclusiveness**

**Environmental
Sustainability**



By ensuring food safety, food exports **gain access to global markets**.

**Economic
Competitiveness**



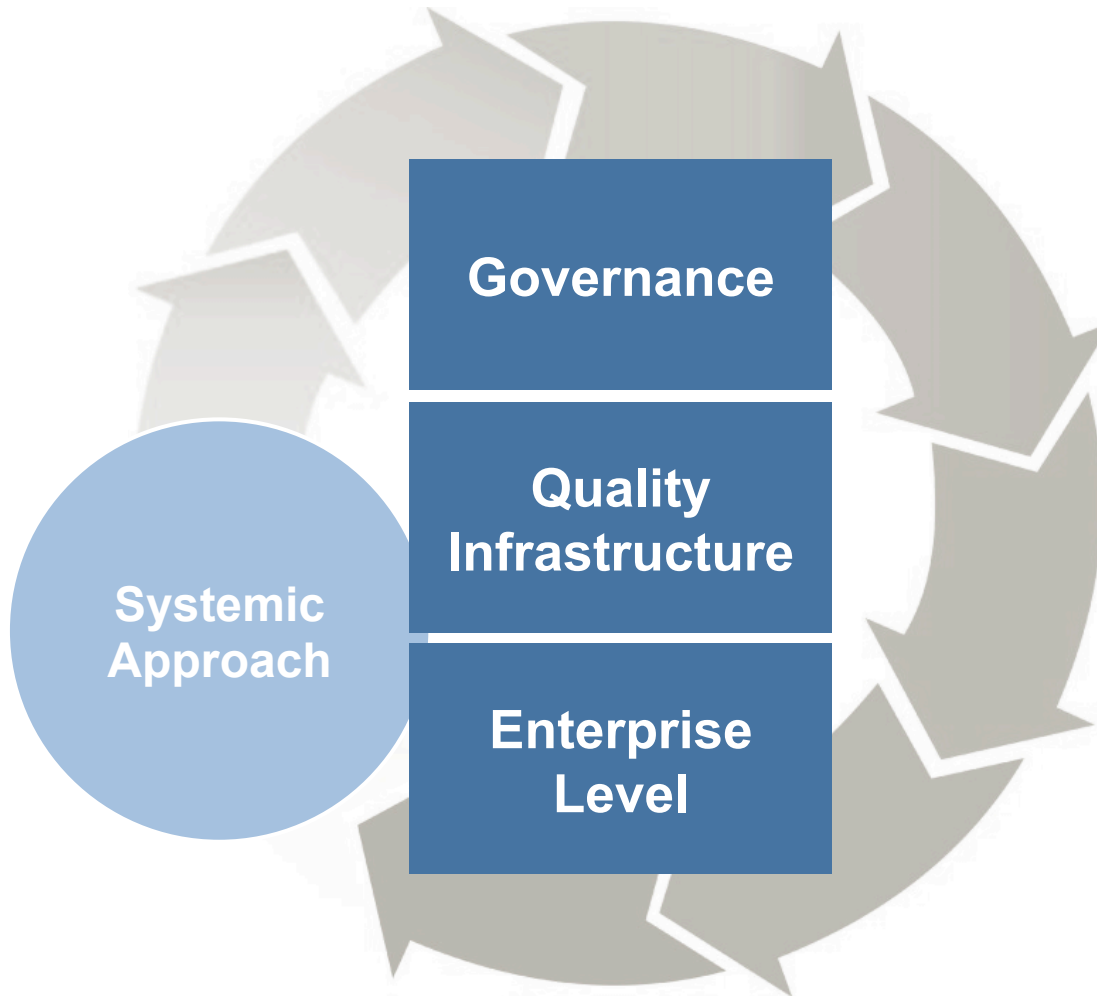


UNITED NATIONS
INDUSTRIAL DEVELOPMENT ORGANIZATION

UNIDO's Approach to Food Safety



UNIDO's Food Safety Approach



Considering coherence of all dimensions:

- Align quality infrastructure with food safety policy and regulatory framework
- Improve food safety related quality infrastructure services
- Introduction of QM schemes to integrate SMEs into global value chains





UNIDO's Food Safety Approach: Value Chain





UNIDO's Food Safety Approach: Partnerships

GLOBAL
PRIVATE
SECTOR



CENTRES OF
EXCELLENCE

REGULATORY
AUTHORITIES

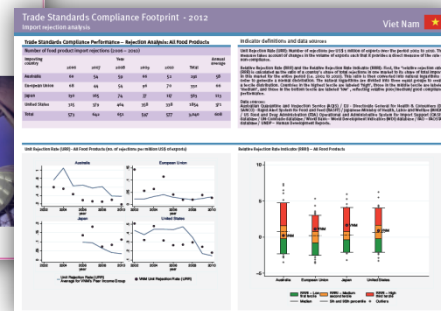


MULTI-LATERAL
DEVELOPMENT
PARTNERS

Trade Standards Compliance Analysis

Meeting Standards, Winning Markets

- EU DG Santé, US FDA, Australia AQIS, Japan MHLW
- Import/Border Rejection Analysis, Buyer Surveys and Compliance Indices



More Information: <http://www.unido.org/tradestandardscompliance.html>

Import Rejection Analysis

What do import rejections tell us?



REJECTED

UNIDO since 2008 works on rejection analysis as a tool for facilitating better policy decisions

Focus:

- Import rejections by world region
- Reasons for import rejection

Analysis by commodity, sector such as fish, fruits and vegetables, nuts and seeds

Reasons and rate of **rejections varies across markets**

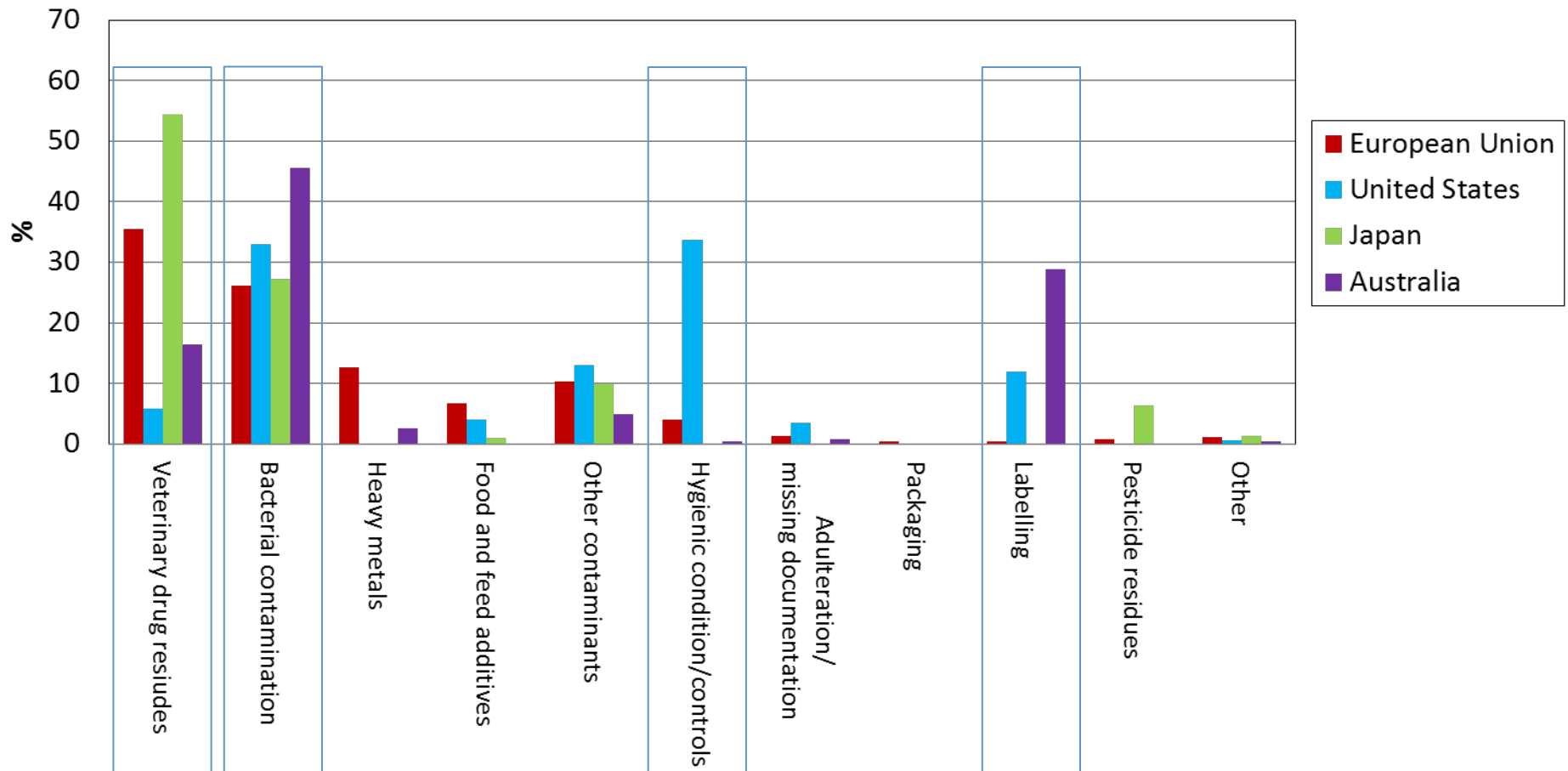
Rejections at importing border are a **good rough indicator of compliance capacity** and for areas where and which improvement is needed

Import rejections have persisted to be a reality for developing country exporters. They provide **areas for policy guidance in terms of investments to achieve compliance** with SPS and TBT requirements in international markets.



Rejection Analysis: Reasons

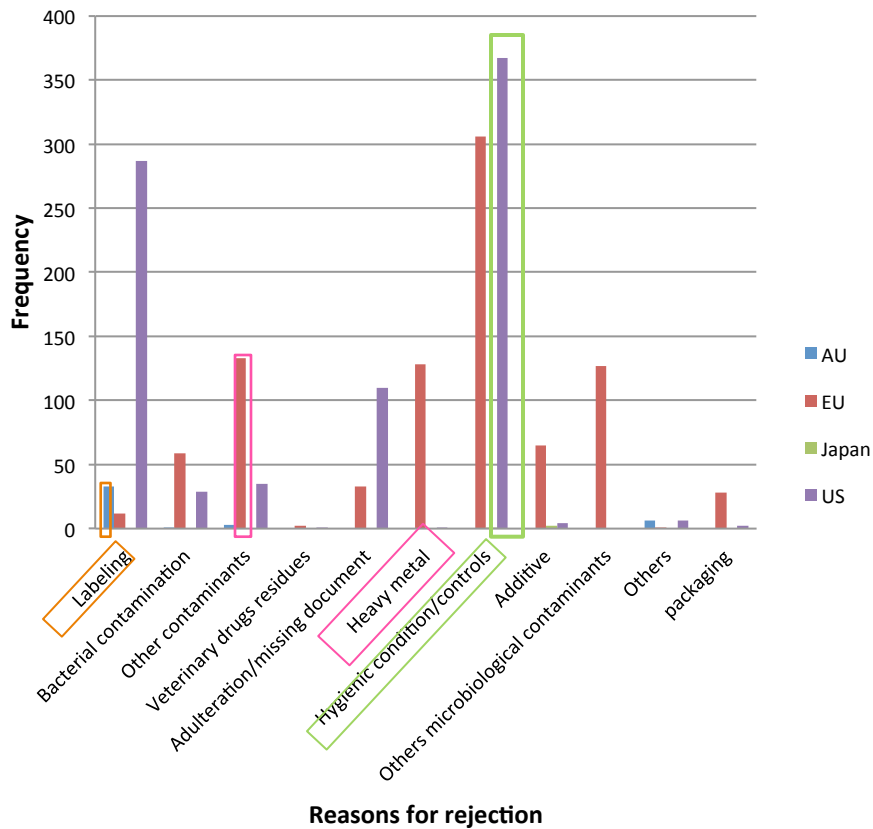
Reasons for Rejection of Fish and Fishery Product Exports - Example



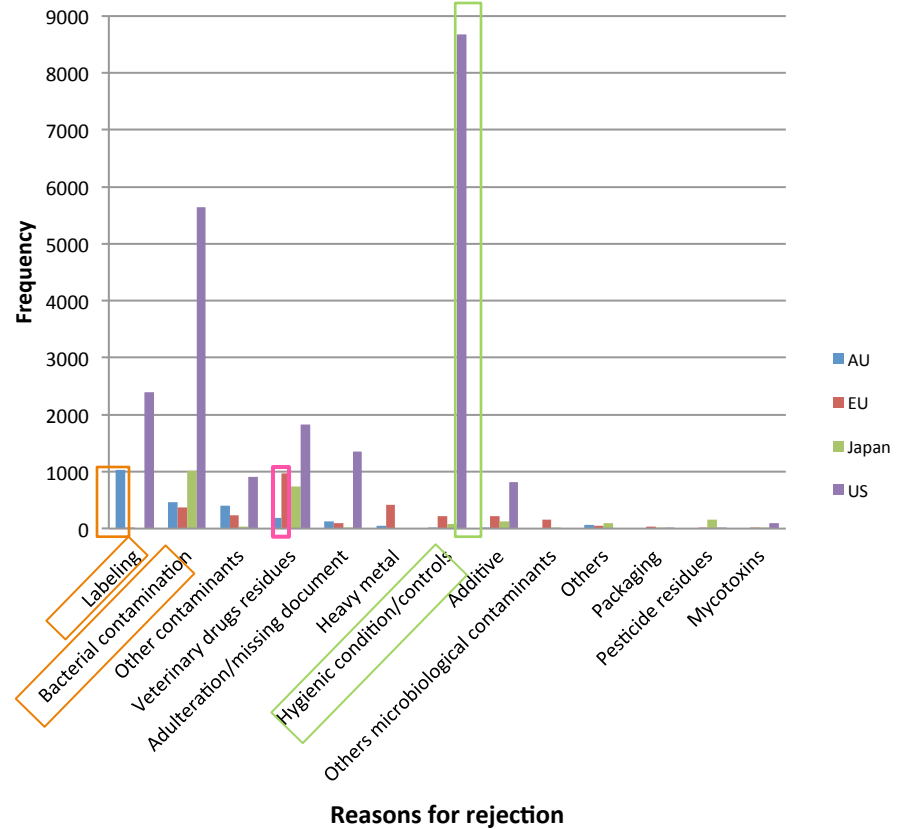


Rejection Analysis by Region: Africa vs Asia

African Fish Products

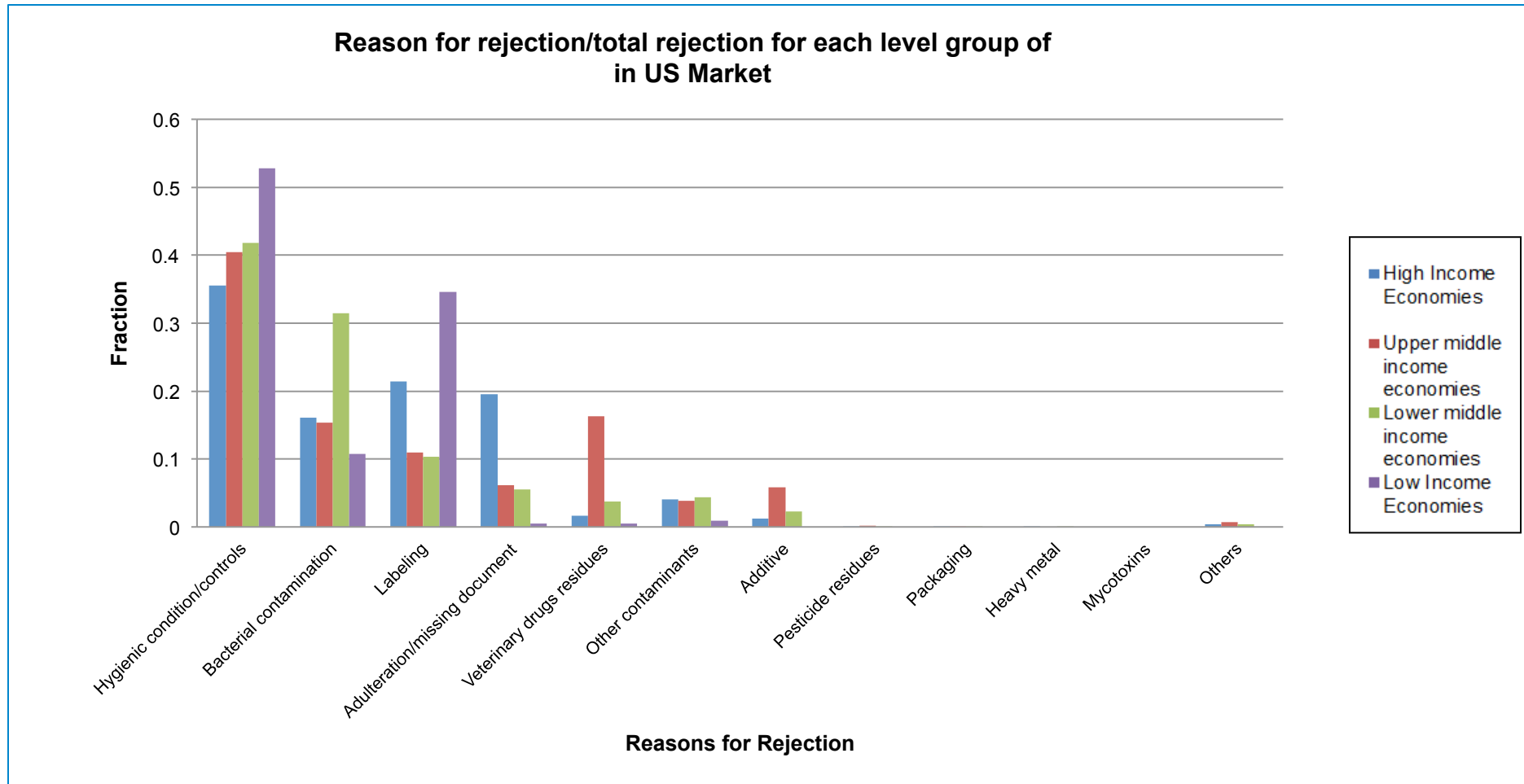


Asian Fish Products





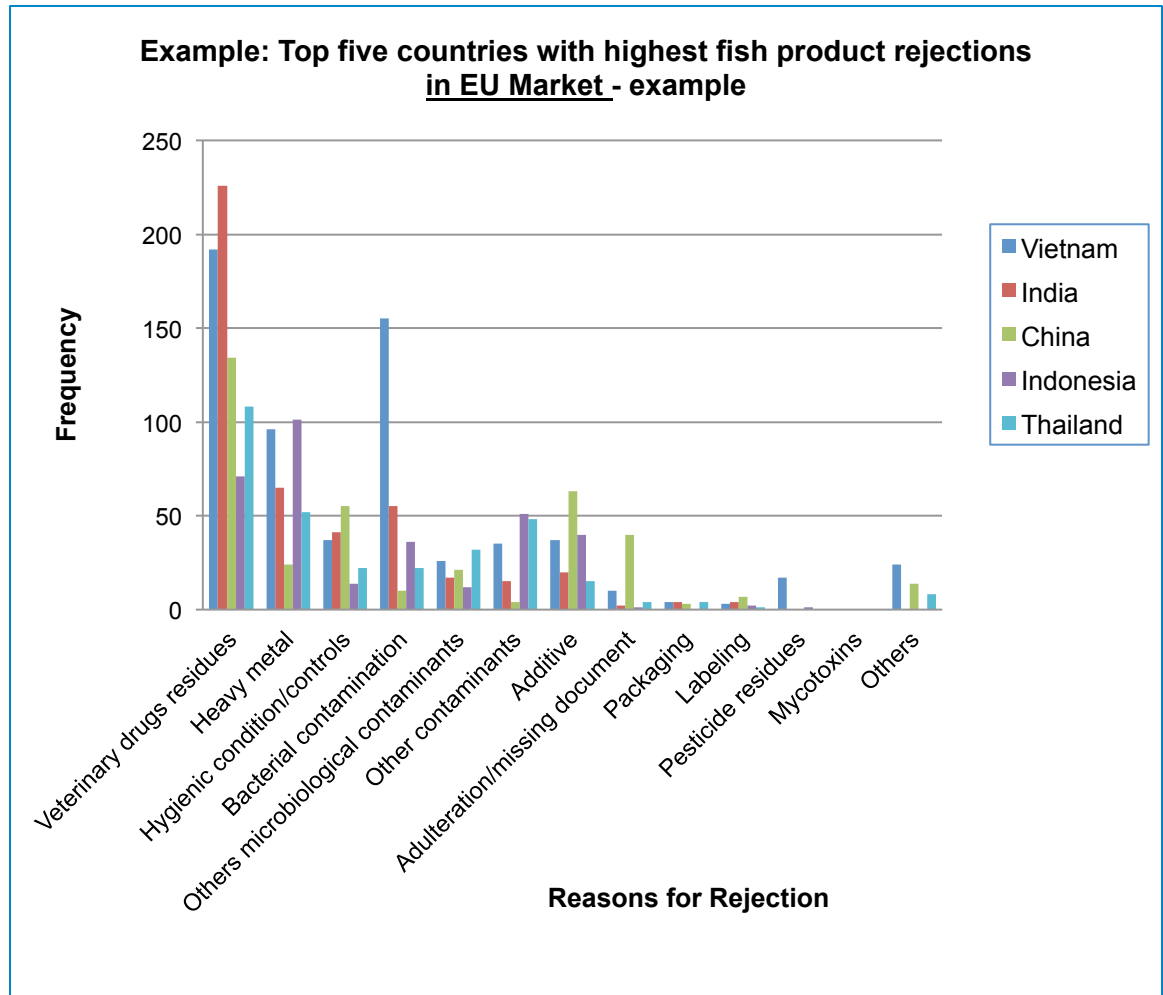
Rejection Analysis by Groups of Countries





Top 5 countries facing compliance issues

- China
- India
- Indonesia
- Thailand
- Vietnam



Economic Losses from Rejections

What are the monetary losses these classification of countries lose from fish products being rejected in different markets?

% = Value of losses from fish rejections in 000\$ / value of fish imports in 000\$

Export losses vary up to US\$ 10-15 million/year per country

Value of loss as % imports of fish products in all 4 markets 2002-2010				
Country classifications	US Market	EU Market	Australian	Japanese
High income: OECD	0.07	0.054	0.29	0
High income: nonOECD	0.59	0.076	0.56	0.03
Low income	1.12	0.177	0.61	0.3
Lower middle income	0.39	0.055	0.35	0.09
Upper middle income	0.19	0.11	0.52	0.01
not classified	0.06	2.04	0.27	0
Total	0.36	0.095	0.39	0.07



Case Stories

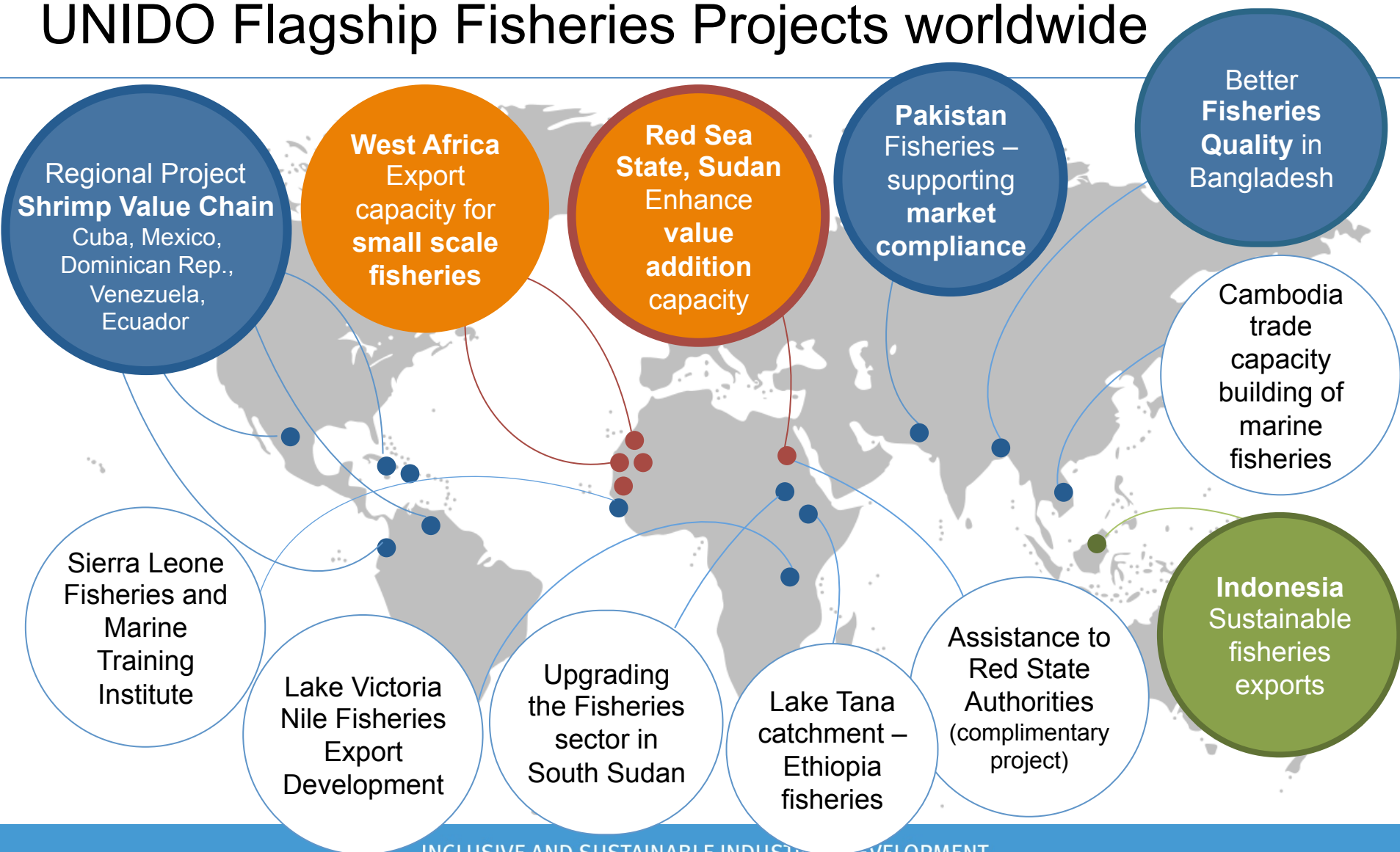
Fisheries and SDGs:

Competitiveness, Inclusiveness and Sustainability





UNIDO Flagship Fisheries Projects worldwide



Challenges in the Fisheries Sector

Environmental Sustainability

The steady increase in fishing and aquaculture production in the 20th century caused **severe environmental impacts** and decimated wild fish stocks and species.

Economic Competitiveness

Producers in the fishery industry in developing countries **lack the ability to meet international requirements, don't have access to technology and infrastructure** necessary to participate and compete in international markets.

Social Inclusiveness

Small-scale, low income fishing communities struggle to reach the **product quality requirements** increasingly demanded by markets. Ocean and freshwater ecosystems have the potential to provide large groups with nutritious products and income, while maintaining cultural tradition.



Bangladesh Seafood retains EU Market Access

The aquaculture/shrimps industry, an important source of rural income for Bangladesh, **suffered a serious setback**: the EU found a number of compliance deficits.

Funding: EU

- Introducing **Hygiene Good Practices** such as Sanitation Standard Operating Procedure (SSOP), Hazard Analysis and Critical Control Points (HACCP), **traceability**
- Support to compliance upgrading of **shrimp farming, and processing**
- Support to the **Competent Authority inspection system and to testing laboratories**

- **Re-gained market access to EU** and other markets;
- **Farms have been upgraded** often at own cost
- Increasing **number of export consignments**
- **Increase in yield and income for participating populations**

A blue circular graphic containing the text 'Economic Competitiveness' in white, bold, sans-serif font.

**Economic
Competitiveness**



Regional LAC: Shrimp Value Chain Development

Countries: **Colombia, Cuba, Dominican Republic, Ecuador, México and Nicaragua**

- **Improve national shrimp value chains** and support producers to increase exports
- **Meeting compliance** with international quality and environment standards
- **Mobilization of technological support** for sustainable productivity

- **Knowledge** networking and enhanced regional partnerships for technology transfer
- **UNIDO integrated support** (AGR/ENV/TCB)
- **Sharing** experience and **capacity building** (South-South Cooperation)



Under Development

Economic Competitiveness

Agri-Business Development

Environment

Trade Capacity Building

Sudan: Enhancing Capacity in the Fisheries Sector

Project country: **Sudan**

Financial contribution: **Canada, Norway** (complementary project)

Establish infrastructure for fish landing along the value chain leading to the establishment of:

- upgraded landing sites, including ice production businesses.
- Establishment of fishermen cooperatives comprising 680 members
- Training of individuals (women) operating small-scale businesses
- Up-scaling of specialized trainings

Assistance to local authorities in **stock assessment, monitoring catch potential** and matching of fishing gear capacities with species distribution (Norway)

A large orange circle containing the text 'Social Inclusiveness' in white, positioned over the top right of the image.

**Social
Inclusiveness**



Small Scale Fisheries in West Africa

Countries: **Côte d'Ivoire, Guinea, Mauritania, Senegal**

- **Assist in conforming** to international sanitary requirements
 - **Upgrading technical capacity** in handling and processing (> 30 fish smoking enterprises)
 - Knowledge dissemination & training about **quality and sanitary standards**
-
- Training of **400 local businesses** & at least **700 individual beneficiaries** on the value chain development approach
 - Development of technical capacity in companies employing **vulnerable social groups** and **female entrepreneurs**

**Under
Development**

**Social
Inclusiveness**



Indonesia: Promotion of Sustainability Standards

- **Commodity-based fisheries exports with low value addition**
 - Reaching to **full exploitation of fisheries resources**
 - **Funding : Switzerland**
- **Upgrading of undergraduate education** in productivity, innovation, sustainability
 - **Piloting of sustainability certification** for wild catch and aquaculture products
 - Establishment of **national traceability scheme**
 - **Buyer linkages**
- **Increased productivity and value addition**
 - Contribution to economic growth through **increased exports**
 - Increased environmental sustainability through **better management of marine resources**

A green circle containing the word 'Sustainability' in white text, positioned above a large circular image of a school of fish swimming underwater.

Sustainability

Conclusion

Fisheries - A prime sector for:

Development of rural areas and employment

Promotion of value addition and sustainable management of natural resources

Development of global supply and trade partnerships

UNIDO' s approach to Fisheries development enriches classical technical assistance:

- Value chain and market driven
- Catalytic capacity-building for up-scaling of impact
- Joint engagement with partners
- Focus on sustainability



Fisheries: A Key Contributor to Global Sustainable Development !



спасибо
 danke 謝謝
 ngiyabonga
 teşekkür ederim
 tapadh leat
 dank je
 gracias
 mochchakkeram
 bedankt
 hvala
 maururu
 thank you
 go raibh maith agat
 arigato
 takk
 dakujem
 merci
 merси
 grazie
 eucharistia
 sagolun
 sukriya
 kop khun krap
 arigato
 terima kasih
 감사합니다



To:



WORLD SEAFOOD CONGRESS
WSC
2015
GRIMSBY UK





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Training the seafood sector



George Krawiec

Seafood Grimsby & Humber





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