



MPEDA

Newsletter

VOL. X NO. 5 AUGUST 2022

MAIN STORY

India's Seafood Export
Performance 2021-22

Indian Anchovy Records
Maximum Marine Landing
of June 2022

Seafood HACCP 'Train the
Trainer' Course: Report

WTO Adopts Agreement
on Fisheries Subsidies



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CONTENTS

05

INDIA - MALAYSIA BUSINESS
MEET FOR ENHANCING
SEAFOOD TRADE



WTO ADOPTED
AN AGREEMENT ON
FISHERIES SUBSIDIES

12

26

EXPORT PERFORMANCE
2021-2022



SNAKEHEADS:
THE EXOTIC FRIENDS FOR
YOUR AQUARIUM

32

39

MPEDA HOSTS
SEAFOOD HACCP TRAIN THE
TRAINER COURSE



SOUTHERN SHRIMP
ALLIANCE WANTS US TO
MAINTAIN TARIFFS ON
CHINESE IMPORTS

48



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On the Platter

Dr. K. N. Raghavan IRS Chairman

Friends,

As a part of MPEDA Golden Jubilee celebrations and *Azadi Ka Amrit Mahotsav*, MPEDA has organized a series of seminars and webinars across the coastal states. The first one was the Indian Tilapia Summit organized at Kochi, and was followed by a series of webinars in states such as West Bengal, Odisha, Andhra Pradesh, Karnataka as well as for the north eastern region, focusing the role play by MPEDA in augmenting aquaculture production and exports.

As you all aware, the Department of Fisheries, Thailand were not permitting import of farmed shrimp from India citing the presence of IMNV in our shrimp farming systems. Consequent to the interventions by MPEDA, Department of Fisheries, Govt. of India, EIC and the Embassy of India in Bangkok, Thailand fisheries department has agreed to accept frozen vannamei shrimp consignments from India subject to testing for viruses. The National Fisheries Products Quality Management Service, South Korea has brought out a Health Certificate requirement from December 2022 for five new pathogens such as DiV, SAV, NHP, TSV and TiLV in consignments of shrimp, scampi and fishes exported to Korea. In this regard, MPEDA along with Department of Fisheries, EIC & ICAR-NBGR held a virtual meeting with the NFQS authorities on 20th July 2022, and the Korean side was explained the disease surveillance mechanism as well as the biosecurity measures adopted by India in containing disease pathogens in India. They were also informed that DiV, SAV, NHP and TSV were never reported in India.

Meanwhile, the GACC of China has brought out certain modifications in regulations related to detection of Covid-19 nucleic acid material in imported cold chain food including seafood. A meeting with the GACC arranged through EOI Beijing on 21st July 2022, in which EIC also took part. GACC has informed that they have repealed the announcement no. 103/2020 which warrants immediate suspension of imports from establishments whose consignments were detected with Covid-19 nucleic acid material. Instead they will provide a two week period for such establishments to present themselves for video inspection, and based on the outcome of this inspection GACC will decide the course of further action as per Orders No. 248 & 249 effective from 1st January 2022. GACC has reiterated that they do not intend to dilute the inspection protocols at ports of import and the revised arrangement effective from 8 July is meant to ease the trade. Exporters to China are required to be vigilant about the risk of Covid-19 nucleic acid material contamination inspections in Chinese ports and should undertake all recommended efforts to ensure that the products are safe.

On the market promotion front, MPEDA has organized webinar on 'Seafood market updates' with Korea, Russia and Germany. MPEDA is also participating in Japan International Seafood & Technology Expo along with exporters. This Expo scheduled to be held in Tokyo from 24th to 26th August 2022.

The Golden Jubilee year of MPEDA has seen a myriad of activities by MPEDA involving seafood industry stakeholders, and the culmination of celebrations will be on 24th August 2022. At this moment, I thank all the stakeholders, employees and pensioners, the pillars of strength of this organization, whose sincere efforts have contributed to elevating MPEDA as the apex body for marine products export sector.

Thank you,

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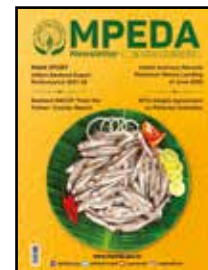
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EDITORIAL SUPPORT

Bworld Corporate Solutions Pvt Ltd

166, Jawahar Nagar, Kadavanthra

Kochi, Kerala, India 682 020

Phone: 0484 2206666, 2205544

www.bworld.in, life@bworld.in

LAYOUT

Mr. Bijo Francis John

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Mr. K.S. Pradeep IFS, Secretary

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MPEDA House, Panampilly Avenue

Kochi, Kerala - 682 036, Tel: +91 2311901

www.mpeda.gov.in
support@mpeda.gov.in

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India - Malaysia Business Meet for enhancing seafood trade



MPEDA in association with High Commission of India, Kuala Lumpur (Malaysia) organized a business meet to enhance the seafood trade between the two countries on 23rd June 2022. Ms. C. Sushma, First Secretary (Commerce and Education), welcomed the participants to the meet. Dr. K. N. Raghavan IRS, Chairman, MPEDA offered felicitations for the meet and thanked the High Commission of India in Malaysia for taking the initiative to organize the programme.

The Chairman, MPEDA pointed out that though the marine exports from India have increased, the seafood trade to ASEAN is comparatively low. He highlighted the importance of understanding the market of Malaysia to enhance the trade. His Excellency Mr. B. N. Reddy, India's High Commissioner to Malaysia, participated in the meet and gave insights on the sustained growth of Malaysian economy post- Covid. He said that Malaysia has imported seafood worth US\$ 1.1 Billion in 2021-22 and India's contribution was about US\$ 68 Million which could be increased to a target of US\$ 100 Million by systematic approach.

Dr. M. Karthikeyan, Director (MPEDA), gave a presentation on 'Seafood export from India to Malaysia', which covered the major products of export from India, potential of Malaysian market, strategies to increase exports to Malaysia including VBSPs, market study, market intelligence report etc. Mr. V.K.K. Rajasekaran, Deputy President of Kuala Lumpur & Selangor Indian Chamber of Commerce & Industry (KLSICCI), Mr. Alex Ninan, President, SEAI, Kerala Region, gave their insights and suggestions on increasing the seafood trade with Malaysia.

Mr. Gunalan Shanmugam, Industrial representative from Malaysia gave a presentation on Malaysian seafood industry, top trading partners, procedures for carrying out import/ export of live fish, conditions for application for import permit of fish, importing live corals/ marine fish from overseas etc. Mr. Anil Kumar. P., Joint Director (Marketing) MPEDA, moderated the question and answer session between the stakeholders. The meet was moderated by Dr. T. R. Gibinkumar, Deputy Director (Market Promotion & Statistics). The business meet was attended by 100 participants including exporters from India and seafood buyers from Malaysia.



MPEDA organized Virtual Buyer Seller Meet with Spain

MPEDA organized a VBSM with Mr. Med Ikbal from M/s. Fatipesca SL from Spain on 15th June 2022 for the requirement of frozen cuttlefish and squid. Six exporters participated in the meet.

The buyer had queries on the seasons of catch, previous experience in trade with Spain and glazing which were answered by the exporters. Dr. T. R. Gibinkumar, Deputy Director (Market Promotion & Statistics), MPEDA moderated the buyer seller meet.



MPEDA participated in webinar on 'Value addition in fisheries and agricultural products: Exploring business and investment between Kerala & Vietnam'

MPEDA participated in the webinar organized by EOI, Vietnam on the topic 'Value addition in fisheries and agricultural products: Exploring business and investment between Kerala & Vietnam' on 22nd July, 2022.

Hon'ble Ambassador of Vietnam in India, Mr. Pham Sanh Chau gave felicitations and highlighted the potential of Kerala state in Fisheries sector.

The expertise of Vietnamese seafood sector in value addition and processing were pointed out by Mr. K. S. Srinivas IAS, Principal Secretary of Fisheries & Tourism Departments, Govt. of Kerala and suggested cooperation in this regard.



Mr. Anil Kumar P., Joint Director (Marketing) MPEDA gave a presentation on 'Strategies for enhancing export to Vietnam'. The presentation covered the status of seafood export to Vietnam from India highlighting Kerala in particular, major items of export, export infrastructure in Kerala, status of value addition in seafood and its potential, scope for Joint Venture companies in seafood sector in India.

MARKETING NEWS

Officials from Matsyafed, Department of Fisheries, Kerala and SEAI also threw light on potential areas wherein co-operation between the two regions could be effectively undertaken which included import of processing machinery from Vietnam, seed production technology of major species like Basa, Milk fish, edible oyster etc. where Vietnam has strong hands, RAS,

Multilayer RAS, deep sea resource utilization, training and technical support in value addition from Vietnam etc. Importers and personnel from sea food industry and Investment Promotion Council of Vietnam briefed about their experience of trading with Kerala. Mr. Bui Trung Thuong, Trade Counselor, EOI, Vietnam moderated the meet.



Webinar on 'Leveraging Free Trade Agreements (FTAs) to grow exports'



Free trade Agreements act as a tool to increase the global foot print of a country in trade. Exporters need to have a thorough knowledge of the provisions of the FTAs, how they are applicable to them, and also how they can leverage them to enhance their international trade.

MPEDA in association with ICICI bank has organised a webinar for the stakeholders in marine exports on 'leveraging FTAs to grow exports' on 28th June 2022. The webinar had a participation of around 80 exporters from various regions. Mr. Anil Kumar P., Joint Director (Marketing) MPEDA, gave the introduction. Mr.

Sudhakar Kasture, International Trade Consultant, gave a detailed presentation on the importance of FTAs, Present FTAs of India, Rules of origin, India-Japan (CEPA) and Indian- UAE (CEPA).

The webinar also included a presentation on the topic 'Expanding exports digitally', by Mr. Shubham Narkhade, who is the member of ICICI team lead by Mrs. Sakshi Chauhan, Product Manager, ICICI Bank Ltd. The presentations were followed by question-answer session. The meet concluded with the Vote of Thanks by Dr. T. R. Gibinkumar, Deputy Director (Market Promotion & Statistics).



Price indicator for marine products (*PRIME*)

Farm gate price

	COUNTRY VANNAMEI SHRIMP	PRICE IN USD PER KG					
			HOSO 30 SIZE	HOSO 40 SIZE	HOSO 60 SIZE	HOSO 80 SIZE	HOSO 100 SIZE
VANNAMEI SHRIMP	INDIA	Odisha	4.92	4.04	3.34	--	2.77
		A.P	5.36	4.6	4.22	--	3.09
		Gujarat	5.42	4.4	3.91	--	2.84
	ECUADOR		20/30	30/40	60/70	70/80	80/100
			5.1	4.25	3.3	3.3	2.8
	CHINA	Guandong	--	--	8.24	7.05	5.82
		Fujian	--	--	6.41	5.67	4.92
	THAILAND		--	5.23	4.58	4.02	3.75
	VIETNAM		6.28	--	5.04	--	4.15
	INDONESIA		--	5.14	4.47	--	3.61
	PHILIPPINES		7.09	5.94	--	--	4.38

(source: Seafood TIP) As on 11-07-22

Price of vannamei grades in India remained stable during the first week of July 2022 as harvest is continuing. As it is peak harvest week in Ecuador, prices remained stable. With China's import restrictions allegedly easing up, prices could improve over time.

In Indonesia, prices are moving up again after a long period of decline but are still at their lowest point over the last 12 months.

As the market demand seems to be increasing, prices in Vietnam are also increasing.

Export price indicator (USD PER KG)

ITEM	Product Form	Grades	USA	China	European Union	Japan	South East Asia	Middle East Asia
VANNAMEI	IQF HEADLESS SHELLON VANNAMEI SHRIMP	16/20	8.65	--	9.32	--	--	--
		21/25	7.95	--	8.07	--	--	--
		26/30	7.28	--	7.57	--	--	--
		31/40	7.28	--	7.19	--	--	--
		41/50	--	--	--	8.75	--	--
	FROZEN HEADLESS VANNAMEI SHRIMP	16/20	--	--	--	7.75	--	--
		31/40	--	7.25	--	--	--	--
		41/50	--	6.92	--	--	--	--

MPEDA Data (1-07-22 to 13-07-22)

MARKETING NEWS

ITEM	Product Form	Grades	USA	China	European Union	Japan	South East Asia	Middle East Asia
	IQF PD TO VANNAMEI SHRIMP	21/25	11.36	--	--	--	--	--
		26/30	9.35	--	--	--	--	--
		31/40	7.39	--	8.32	--	--	--
		41/50	6.88	--	--	--	--	--
POOVALAN	FROZEN PUD SHRIMPS (POOVALAN)	300/500	--	5.98	--	6.08	--	--
		200/300	--	--	5.24	6.34	--	--
		100/200	--	--	5.44	--	--	--
KARIKADI	FROZEN PUD SHRIMPS (KARIKADI)	80/120	--	--	6.55	--	--	--
		100/200	--	--	5.50	--	--	--
		200/300	--	--	5.33	--	--	--
	FROZEN RAW PUD BROWN SHRIMPS	200/300	--	--	5.33	--	--	--
		100/200	--	--	5.53	--	--	--
SCAMPI	BL. FR. H ON SCAMPI	U/5	--	--	--	--	9.11	--
		U/10	--	--	--	--	7.69	--
	IQF H ON SCAMPI	U/10	--	--	--	--	--	7.79
	CUL. HL SCAMPI (FW SHRIMP)	6/8	--	--	19.27	--	--	--
BLACK TIGER	IQF H ON TIGER SHRIMP	U/5	--	--	--	--	--	12.49
	FR. HEAD ON SEA TIGER SHRIMPS	U/5	--	--	--	--	--	11.47
SQUID	IQF SQUID WHOLE CLEANED	20/40	--	--	4.42	--	--	4.09
		10/20	--	--	5.42	--	--	4.59
	FR. SQUID (WHOLE CLEANED)	U/5	--	--	5.32	--	--	--
		U/10	--	--	4.31	--	--	--
		10/20	--	--	3.77	--	--	--
	FR. SQUID WHOLE CLEANED	U/5	--	--	6.81	--	--	--
		U/10	--	--	6.61	--	--	--

MARKETING NEWS

ITEM	Product Form	Grades	USA	China	European Union	Japan	South East Asia	Middle East Asia
CUTTLE FISH	FR. CUTTLEFISH (BABY)	60/80	--	--	6.10	--	--	--
	FR. CUTTLEFISH TENTA-CLE	60/80	--	--	--	--	--	--
OCTOPUS	FR OCTOPUS WHOLE	300/500	--	--	--	--	4.52	--
		200/300	--	--	--	--	4.52	--
		100/200	--	--	--	--	4.52	--
	FROZEN OCTOPUS	20/40	--	--	--	--	--	4.29
		10/20	--	--	--	--	--	4.29
RIBBON FISH	FR. RIBBON FISH / WHOLE	200/300	--	1.63	--	--	--	--
		ASSORT-ED	--	1.75	--	--	--	--
		300/400	--	1.60	--	--	--	--
	FR RIBBON FISH WHOLE	100/200	--	2.06	--	--	--	--
CROAKER	FR. CROAKER (SILVER)	100/200	--	2.05	--	--	--	--
		ASSORT-ED	--	1.52	--	--	--	--
TUNA	FR.TUNA WHOLE ROUND (SKIPJACK)	2KG/UP	--	--	--	--	--	1.24
	YELLOW FIN TUNA LOINS(IQF)	15/25	--	--	4.96	--	--	--

FROZEN FISH - US\$/Kg		
Product Form	Grades	REUNION
IQF REEF COD (GUTTED)	700/1000	7.04
	500/1000	6.84
	1KG/UP	6.34

CRAB - US\$/Kg			
Product Form	Top countries by US\$ million		
	Grades	USA	SINGAPORE
CRAB (PASTEURISED CRABS)	JL	16.34	--
	CL	12.89	
LIVE MUD CRAB	500 GMS UP	--	22.04
	500 GMS	--	19.27
	250gms	--	14.83

LOBSTER - US\$/Kg		
Product Form	Grades	ITALY
IQF SLIPPER LOBSTER	U/1	8.91
	U/10	7.16
FR. DEEP SEA LOBSTER TAILS	U/10	5.03
	10/20	4.03
	20/30	3.03

SURIMI - US\$/Kg		
Product Form	Grades	JAPAN
SURIMI	SA	3.38
	AA	3.18
	C	1.61
SURIMI(FR.RIBBON FISH/ TACHIHO FISH)	B	2.17
	C	2.14
SURIMI FR.FISH(ITOYORI)	SA	3.43
	AA	3.42
	KA	2.66

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WTO adopted an agreement on fisheries subsidies



The WTO's 12th Ministerial Conference, held in Geneva from June 12–15, 2022, adopted an agreement that forbids fisheries subsidies that contribute to IUU fishing and eliminates subsidies that support overfished stocks. An appropriate and differential treatment for developing country members and least developed country Members form an integral part of these negotiations.

SUBSIDIES CONTRIBUTING TO ILLEGAL, UNREPORTED AND UNREGULATED FISHING

WTO member countries are not permitted to grant or maintain subsidy to a vessel or operator engaged in illegal, unreported, or unregulated (IUU) fishing or allied activities. Each Member country must have laws, rules, and administrative procedures in place to ensure that the subsidies provided are used in sustainable manner. Subsidies granted or maintained for fishing with the EEZ, by developing country Members and LDC (Least Developed country) Members, are exempt from this, for a period of 2 years.

SUBSIDIES REGARDING OVERFISHED STOCKS

No Member shall grant or maintain subsidies for fishing

or fishing related activities regarding an overfished stock. A Member can grant subsidies, only if such subsidies or other measures are implemented to rebuild the stock to a biologically sustainable level. Subsidies granted or maintained for fishing in the EEZ, by developing country Members and LDC Members, are exempt from this, for a period of 2 years.

OTHER SUBSIDIES

No Member is allowed to grant or maintain fisheries subsidies outside of the jurisdiction of a coastal Member or a coastal non-Member and outside the competence of a relevant RFMO. While providing subsidies to vessels not flying that Member's flag, a Member shall take necessary caution and moderation. For providing subsidies for fishing or allied activities of stocks whose status is uncertain, a Member shall take extreme care and apply necessary control.

REFERENCE

▪ <https://www.wto.org/> (Notification No: WT/MIN(22)/33 WT/L/1144)

Compiled by Marketing Services Section, MPEDA



Indian Anchovy records the maximum landing in June 2022

Dr. Afsal V. V. & Dr. Joice V. Thomas
NETFISH-MPEDA

NETFISH monitors the marine fish landings occurring at selected major harbours / landing centres in India through the Harbour Data Collectors engaged at around 100 landing sites across the country. The details of the fishing vessels arriving at the harbor / landing centre and the species-wise quantity landed by these vessels, are recorded on a daily basis. This report summarizes the species-wise, harbour-wise and state-wise trends on marine landings observed during June 2022.

I. OBSERVATIONS ON FISH CATCH LANDINGS

During June 2022, marine landing data was obtained only from 67 selected landing sites along the main land of India. Marine fish landings reported for the month totalled to 15,420.60 tons, which was composed of 8,541.03 tons (55 %) of Pelagic finfishes, 3,483.09 tons (23 %) of Demersal finfishes, 1,952.08 tons (13 %) of Crustaceans and 1,444.40 tons (9 %) of Molluscs (Fig.1).

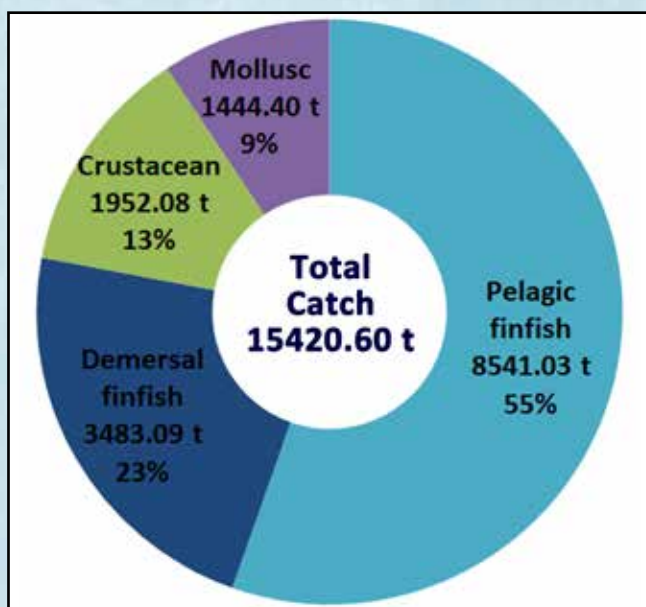


Fig.1: Catch composition of marine landings recorded in June 2022

Altogether, landing of 228 species of marine fishery items were recorded during the month, of which, the major five contributors were *Stolephorus indicus*, *Johnius spp.*, *Rastrelliger kanagurta*, *Harpadon nehereus* and *Nemipterus japonicus* (Table 1).

Table 1: Major fish species landed during June 2022

Sl. No:	Common name	Scientific name	Qty. in tons
1	Indian anchovy	<i>Stolephorus indicus</i>	3,016.55
2	Croaker	<i>Johnius spp.</i>	1,047.07
3	Indian mackerel	<i>Rastrelliger kanagurta</i>	944.72
4	Bombay duck	<i>Harpadon nehereus</i>	555.36
5	Japanese thread fin bream	<i>Nemipterus japonicus</i>	447.13

On analysing the landing trend after categorizing various species into their common groups, the Anchovies, Coastal shrimps, Croakers, Mackerels and Tunas were observed as the items with highest contribution to the landings.

These five fishery items together had formed 51 % of the total catch (Fig. 2). The other major items reported were Threadfin breams and Squids.

FOCUS AREA

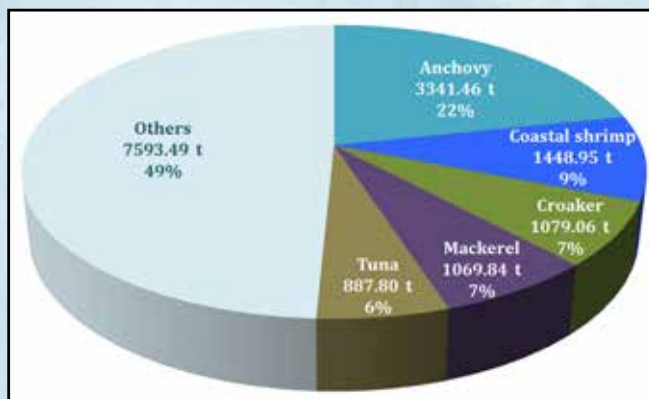


Fig.2: Major fishery items landed during June 2022

Among Pelagic finfishes, Anchovies and Mackerels were the highest contributors, and among Demersal finfishes, the Croakers and Threadfin breams were the most landed items. About 74 % of the Crustacean catch was comprised of different species of coastal shrimps, of which the *Poovalan* and *Karikkadi* shrimps were the dominant species. In the case of Molluscs, the Squid and Cuttlefish were the most landed items.

State-wise landings: The state of Kerala recorded the highest landing during the month which was to the tune of 6,907.59 tons (45 %). It was followed by West Bengal and Tamilnadu with a share of 4,073.52 tons (26 %) and 2,974.51 tons (19 %) respectively. The landing from the West coast states Karnataka, Goa & Maharashtra were very meagre and no landing was reported from Gujarat during the month.

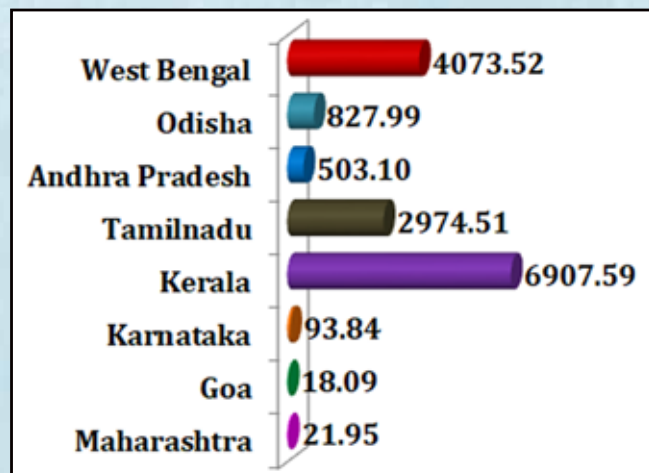


Fig.3: State - wise fish landings (in tons) during June 2022

Harbour-wise landings: The monthly landing is reported from 67 landing sites along the coastal states of India. The Neendakara harbour in Kerala had recorded the maximum fish landings, which was to the

tune of 1,427.78 tons. It was followed by Deshapran and Sankarpur harbours in West Bengal, with a share of 1,317.52 tons and 977.88 tons respectively.

II.OBSERVATIONS ON BOAT ARRIVALS

Total 15,011 fishing vessel arrivals were recorded from 67 fish landing sites during June 2022. State - wise figure (Fig. 4) shows that the highest number of boat arrivals had occurred in Kerala (40 %) and then in Tamilnadu (37 %) and West Bengal (13 %). Muthalapozhy (800 nos.) and Cuddalore (609 nos.) harbours had topped the list in terms of highest number of boat arrivals.

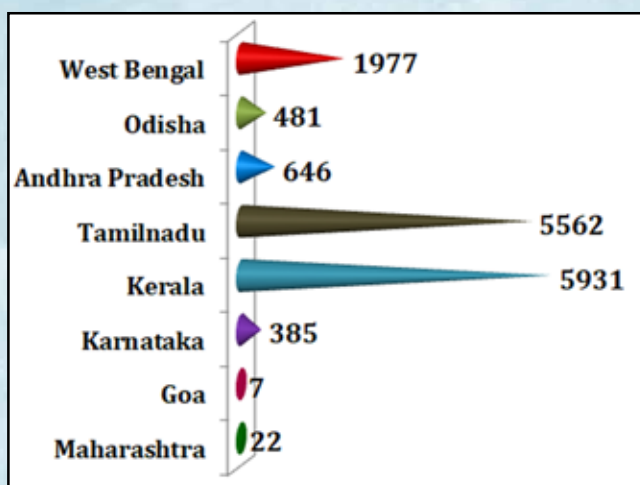


Fig.4: State - wise boat arrivals (nos.) during June 2022

Summary: A total of 15,420.60 tons of marine landings and 15,011 boat arrivals were reported during June 2022 from 67 major fishing harbour/landing centres along the maritime states. The total catch reported had dropped drastically during the month due to the fishing ban period prevailed along the East coast till 15th June and the fishing ban started along the West coast in June. Compared to that of May 2022, there was a decrease by about 24,570 tons in catch landings and by about 11,183 numbers in boat arrivals during June 2022. The Pelagic finfish resources continued as the major contributor to the total landings and the Indian Anchovy (*Stolephorus indicus*) had recorded as the most landed species during the month pushing Indian Mackerel to third position. Kerala remained in the first place among the states in terms of total catch landed as well as the number of boat arrivals recorded. Among the various landing sites, the Neendakara harbour attained the first position in terms of total catch landed whereas Muthalapozhy harbour gained the first place in terms of number of boat arrivals.



International Trade Settlements in Indian Rupee

Features of the RBI circular:

The Reserve Bank of India, in a circular dated 11 July 2022, set up a system for settlement, invoicing and payment of exports and imports in the Indian Rupee. Until now, for all international trades, the settlements, invoicing and payments were done in the respective foreign currencies (US dollar, euro, British pound, Australian dollar, Canadian dollar, Singapore dollar, etc). Henceforth, such international trade transactions can be traded and settled in the Indian Rupees as well.

The framework of FEMA, 1999 Act has been modified to permit AD (authorized dealer) banks in India to open Special Rupee Vostro Accounts of correspondent bank/s of the partner trading country. Such accounts can be used for the settlements of international trade transactions with any country. Prior to setting up of the rupee settlement mechanism, the AD bank shall require an approval from the Foreign Exchange Department of the Reserve Bank of India, Central Office at Mumbai.

Broad features of such an international trade mechanism are outlined below:

1. Invoicing of goods and services: any export or import under this plan may be invoiced and denominated in the Indian Rupee (INR).

2. Exchange Rate fixing: price discovery of the exchange rate between the currencies of the two trading partner countries may be market determined.

3. Settlement currency: The settlement of international trade transactions under this arrangement shall take place in Indian Rupees (INR).

Indian exporters, who wants to use the rupee settlement mechanism for undertaking exports of goods and services, shall be paid the export proceeds in INR from

the balances in the designated Special Vostro account of the correspondent bank of the partner country.

Similarly, Indian importers undertaking import of goods and services through this mechanism shall make their payments in INR, which shall be credited into the Special Vostro account of the correspondent bank of the partner country, against the invoices for the supply of goods or services from the overseas seller/supplier.

International trade transactions undertaken and settled under these guidelines shall be subjected to the standard documentation and reporting requirements. The overall framework of Uniform Customs and Practice for Documentary Credits (UCPDC) will be the guiding principles for issuance of Letter of Credit (LC) and any other trade related documentation, and it may be decided mutually between banks of the partner trading countries. Such banks of partner countries may also mutually agree for exchange of messages in a safe, secure and efficient manner.

Through the international trade settlement in Rupee system, Indian exporters may receive advance payment against exports from overseas importers in Indian rupees. Indian Banks, prior to allowing any such receipt of advance payment against exports, shall ensure that the available funds in these accounts are first used towards payment obligations arising out of already executed export orders/export payments. This shall be in compliance with the conditions mentioned on 'Receipt of advance against exports' under Master Direction on Export of Goods and Services, 2016. The Indian bank maintaining the Special Vostro account of its correspondent bank shall, in addition to its usual due diligence measures, verify the claim of the Indian exporter with the advice received from the correspondent bank before releasing the advance payment. The Indian Bank shall also ensure that the advance is released only as per the instructions of the overseas importer.

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Under the new rupee payment mechanism, 'set-off' of export receivables against import payables in respect of the same overseas buyer and supplier with facility to make/receive payment of the balance of export receivables/import payables, if any, will be permissible, subject to the existing conditions mentioned in 'Set-off of export receivables against import payables' under Master Direction on Export of Goods and Services, 2016.

Issue of Bank Guarantees for international trade transactions, undertaken through the new arrangement, is permitted subject to the compliance of the provisions of FEMA Notification of Master Direction on Guarantees & Co-acceptances.

In the Rupee Special Vostro account, any available surplus balance may be used for acceptable current and capital account transactions, with mutual agreement. Available balances in such accounts can be utilized for the following purposes:

1. Payments for permissible investments
2. Payments for projects
3. Export/Import advance flow management
4. Investment in Government Treasury Bills, Government securities, etc.

Reporting of international trade and cross border transactions under the new arrangement need to be done as per the guidelines of FEMA 1999.

An AD bank in India maybe approached by any bank of a partner country for opening of a Special Rupee (INR) VOSTRO account. The Indian AD bank will seek an approval from the Central Bank (RBI) with details of the arrangement. Indian AD bank maintaining the special Vostro Account shall comply with all the due diligence processes and ensure that the correspondent bank is not from a country or jurisdiction in the updated FATF Public Statement on High Risk & Non-Co-operative Jurisdictions on which FATF has called for counter measures.

Writer's observations

The Reserve Bank of India permitting Rupee

settlements for international trade (exports and imports) is a huge step in internationalizing the Indian currency. There may not be immediate apparent benefits, except of course, for crude oil trades with Russia and Iran. Nevertheless, long-term advantages could be massive and far reaching. Any country who wants to trade with India and looks for easy trade settlements, the new system will allow a comfortable mechanism using the Indian Rupee instead of any other foreign currency. The Indian banking system will allow and honour such international trades. The challenges will be more for the overseas exporter/importer, who will need efficient systems to convert Indian Rupee to their domestic currency and settle it. Since Indian Rupee is not a widely traded international currency, effective price discovery as well as exchange rate conversions could be difficult tasks.

Moreover, such overseas exporter/importer will be exposed to his domestic currency vs Indian Rupee volatility risk, and will look for mechanism to hedge such forex risks. Financing of such international trades is another grey area. Cost of forex conversions as well as cost of hedging will need to be borne; by whom is the real question? There are just too many unknowns and grey areas. It will certainly be a challenging task for Indian exporters/importers in convincing their overseas counterparts to accept the Indian Rupee as a currency of trade, invoicing and settlement.

In any new system (whenever there is a massive change from an earlier norm), such challenges usually arise at launch and persist through the initial teething period. Once few trades are successfully executed, learnings are shared and issues are ironed out.

When larger participation starts, cost of operations reduces, market making improves, document streamlining gets better and the system becomes well-oiled to work efficiently. A large part of the success of this system depends on Government push. Once large volume Government-to-government contracts (Oil & Gas, Pharmaceuticals, Agriculture, etc) start flowing through the mechanism, private players will flock to make use of the new facility. The real benefits will only be realised then. Not only is this a colossal step in making the Indian Rupee a more acceptable currency worldwide, it is a considerable leap towards capital account convertibility. Probably a harbinger of goods things for India. History is made.





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Monthly outlook forecast report

Ritesh Victor: Co-Founder & Country Head - Market Risk Advisory & TPO, Myforexeye Fintech Pvt Ltd

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US\$INR

US\$INR remained on front foot from the start of the month as the pair opened at 77.58 and made a low of 77.46 only while pair made a fresh peak of 79.12 in the last week of the previous month, weighed down by major strength in the dollar and as market participants retreated from the domestic equity markets. Greenback remained strong versus major peers due to the prospects of aggressive U.S. interest rates and concerns of a widespread recession.

Though market participants saw intervention by RBI to protect our beloved Rupee but couldn't help much as the depreciation pressure on the local unit was large. Looking at current scenario of fear of widespread recession and dollar index at 105+ levels could depreciate Rupee further in the near-term, RBI might intervene to protect local unit but we recommend Importers to hedge for near term payments on every dip.

It's an important month ahead for the pair as Nikkei Services PMI for June month is scheduled in the start of the week while on the US side Services PMI and

ISM Non-Manufacturing PMI is set to release in the mid of first week along with Initial jobless claims.

Market participants will be eying on the US job data scheduled for the last trading day of the first week - A higher than expected reading should be taken as positive for the pair, while a lower than expected reading should be taken as negative. Going ahead Core Retail sales and Core CPI is set to release in the mid of month while Fed Interest rate decision due at the end of month which might decide the direction of the pair.

Indian Rupee intraday losses around 79.19, staying within a fortnight-long triangle, during one day session, the pair has displayed an unimaginable shocking threat since the last one month after touching an all-time monthly highs at 79.19.

While a short-term trading range below 79.50 capped US\$/INR upside, the pair bears have recently turned negative as the RSI (14) hints at receding bearish momentum. The asset has been trading continuously on the depreciation for the past one week from 78.20 to 79.21 almost weakening by 1.00 rupees in the last week of the month.

However, the US\$/INR sellers need to acquire the 100-SMA, around 79.50, to take control back. A major volatility gap between the 20- and 50-period daily Simple Moving Averages indicates the market trending up to 78.69 & 78.18 respectively. After the , low of June 2 oscillating near 77.37 will come next to the 200-SMA level adopting 78.50 to restrict the short-term US\$/INR downside.

On the other hand, recovery remain negative until the pair stays above mentioned triangle's resistance line near 79.00. Also downside key psychological hurdle is the 78.85 level. Should the US\$/INR prices cross the



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79.20 resistance, the odds of witnessing the 79.50 threshold on the chart can't be ruled out.

EURUS\$

The EURUS\$ pair started the month of June with a deep fall. The highest mark was 1.2616 on the first trading day. The pair's movement was connected to the government bond yields' trend directly and it was impacted by inflation and growth-related worries.

The pair fell in the monthly session and ended around the 1.2175 price zone, as worries concealed other factors. The Governing Council said that the next hike will come in September. The Federal Reserve held a monetary policy meeting, and as broadly anticipated, decision-makers made a final decision to hike the interest rate by 75 basis points, the most significant hike since 1994.

The EURUS\$ pair recovered some levels after collapsing to the bottom level in mid-June at 1.0358 and finished the week by gaining some levels above the 1.0500 thresholds. Traders will be looking for the US Nonfarm Payrolls figure on Thursday, along with the US ADP jobs data released just before the weekly Jobless Claims. The Euro tried to march at first during the last trading week of June, but couldn't resist. On the weekly chart, this region is worth paying close attention to, because the 1.04 level has been a

significant support in the past and if the pair manages to stay above there, it opens up the possibility of trying to build up some type of base, but currently it looks like everybody's focusing on buying US dollars, and therefore I'm not looking for any signs of a turnaround. If the market were to rally from here, the 1.06 level is an area that's been very resistive and difficult to break above in the last three weeks, followed by the 1.08 level.

With all the present factors in mind, I do believe that it is probably only a matter of time before we break through the 1.04 level and go much lower. Once the pair breaks down, the 1.02 level is my next target, followed by parity. I do think that we will see parity in a few months, especially as economic conditions continue to show no signs of improvement. With the world heading into recession, the greenback will continue to be very strong, at least through foreseeable future. In the meanwhile, it's about trying to buying cheap US dollars.

GBPU\$

The decline in the Treasury bond yields of US kept the US\$ bulls on the defensive, offered support to the GBP/US\$. The US Fed non-stop chatter about hikes to curb inflation, along with the prevalent risk-off mood as a tailwind for the safe-haven. BOE monetary policy divergence with the US Fed weighed on the sterling.



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BOE Governor Bailey spoke at the ECB Forum on Central Banking, stating that the Bank of England may not need to forcefully get inflation under control adding that cracks were appearing in the economy of the UK. The subsequent decline below the 2-week-old descending trend support confirmed a fresh bearish breakdown and supports a near-term depreciating move.

The negative outlook is reinforced by the fact that technical indicators on the daily chart are away from being in the oversold territory.

The British pound initially tried to rally during the last trading week of June, but then fell hard slamming into the 1.20 level. This is a big, round, psychologically important support level, which has been recently attempted. It has been an important historical level too, so I think a lot of market participants are going to be paying attention to it.

A break below the 1.20 level opens up the possibility of 1.18, followed by 1.16. The British pound itself is not necessarily a currency that we should worry about, the pair is being dominated by the US dollar right now rather than anything else. Rallies at this point in time should be considered as selling opportunities because quite frankly there are no good economic fundamentals backing up the pound.

Because of this, people will continue to flock towards the US dollar, as it is considered to be a safe haven

currency. It is not until the Federal Reserve changes has a shift in its overall attitude that I see the US dollar's strength fading, and at this point that does not look likely to happen anytime soon. With the Federal Reserve becoming increasingly hawkish, the US dollar will strengthen a lot more.

US\$JPY

The US\$JPY pair counted gains close to 2.80% during the third week and ended the week with a surge, followed by the Japanese authorities statement's, which accepted the yen weakness. The assumption was that the Bank of Japan might control its monetary support by tracking the movement of central bank rate increases.

BoJ Governor Haruhiko Kuroda also said in the diet that a change in the bank's monetary policy was plausible and of the clear struggle for Japanese consumers and importers caused by the yen's advanced weakness. The US\$JPY pair was high at 137.005 on the second-last trading day. The followed falling and recovery indicated the Federal Reserve's rate increases dynamic leading to multiple US dollar-based currency values.

The BOJ remains unchanged in its dovish monetary policy. The advanced spread between Japanese Government Bonds (JGB) and US Treasuries had been guided solely by the American side. Credit markets depicted the US Fed's inflation rate program, boosting the 10-year yield from the levels around 1.514% in 2021

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to its June 14 high at 3.480%. This week Japanese data ahead will be contingent on the market moves. The June's Eco Watchers Survey following regional sentiment is the most compulsive.

We expect the US\$ broadly to strengthen in 3rd quarter on tightening financial conditions and with high inflationary pressure and the US Fed to tighten further, the scope for a correction lower in US\$JPY is not large. Furthermore, yields have started to fall which if sustained in these fast moving markets. The Treasury-JGB spread has been strong support for the pair, as it decreases it also takes the US\$JPY down with it as a trend.

The US Fed has given no quarter to the notion that its interest rate hikes could be halted due to recession. Market participants are not buying that hard talk. Treasury yields have come off sharply in the last 2 weeks and will continue to fade if US data points crumble. The MACD Wednesday cross of the signal line and its gap on Friday is a classic sell signal in the early market hours.

Confirmation is obtained from the Relative Strength Index which has plunged to its lowest point in 2 weeks. The strong resistance is at 136.81 (indicated by the green horizontal line). The major support can be seen at 134.44 (presented with the red horizontal line).

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ICAR-CIFT organizes national campaign on 'Fish for health and prosperity'

ICAR-Central Institute of Fisheries Technology (CIFT) launched a national campaign on 'Fish for health and prosperity' at its main campus at Kochi as a mark of commemorating the 75th year of Indian independence as *Azadi Ka Amrit Mahotsav* on 16th July 2022. The campaign was contemplated to highlight the importance of fish as a nutritious food for human health and alleviating malnutrition in the society. The programme was organized in hybrid mode in collaboration with all fisheries research institutes under Fishery Division of ICAR.

Dr. K. N. Raghavan IRS, Chairman, MPEDA, Kochi graced the occasion as Chief Guest. In his inaugural address, Dr. Raghavan accentuated the nutritional value as well as delectability of fish for human consumption. He touched upon the history and present status of fishing in India and expressed concern over the declining status of thriving marine fishery industries of the past with swelling population and burgeoning demand for fish. In this context, he suggested aquaculture as the emerging sector sharing the major demand for fish for consumption. He also emphasized the major issues leading to ocean famine whereby livelihoods of millions of fishers are affected and availability of cheap and nutritious fish is impacted and called upon to resolve these issues to save the planet.

Dr. Leela Edwin, Director, ICAR-CIFT, in her deliberation highlighted the importance of fish consumption, present status of consumption in our country and nutritional values associated with fish. She briefed the major achievements of ICAR-CIFT and its contributions towards sustainable fishing and role of ICAR-CIFT as a pioneer in fishery business incubation. Earlier, while welcoming the delegates, Dr. T.V. Shankar, Principal Scientist & In-charge, PME Cell, ICAR-CIFT discussed the importance of *Azadi Ka Amrut Mahotsav* and the initiatives taken by ICAR and its institutes in celebrating the 70th week celebration of *Azadi ka Amrit Mahotsav* under the theme related to fisheries science.

Dr. Shivakumar Magada, Dean, College of Fisheries, Mangalore, gave felicitations and gave a lecture on 'Fish for health and wealth'. Dr. Chadag V. Mohan, Principal Scientist, World Fish, Malaysia gave lecture on 'Aquatic foods for healthy fish and planet'. The programme had participation of about 12,547 participants joining



both offline and online mode from Krishi Vigyan Kendras (KVKs), College of Fisheries(CoFs) and other line organizations of different states including all fisheries research institutes and some more research organizations in ICAR comprising of scientists, students, academicians, researchers, extension professionals and other stakeholders. Queries pertaining to the theme were also discussed by the speakers.





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Hon'ble Minister of State for Commerce and Industry meets MPEDA officials at Hyderabad



Mr. Som Parkash, Hon'ble Minister of State for Commerce and Industry, Govt. of India reviewing the functioning of MPEDA on 4th July at Hyderabad





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MPEDA Officials meet Joint Secretary, DoC

Maharashtra



As per invitation from Export Inspection Agency, Mumbai, MPEDA officials attended the meeting chaired by Mr. Diwakar Nath Misra, Joint Secretary, DoC and Director, EIC at Export Inspection Agency, Mumbai on 16th June 2022. Mr. Naresh Tambada, Deputy director and Mr. Subray Pavar, Assistant Director from MPEDA, RD, Mumbai attended the meeting.

EIA, Mumbai was represented by Mr. B. C. Kotak, Joint Director (Tech), Dr. Mahendra Shirsath, Deputy Director (Tech), Mr. B. K. Patil, Deputy Director (Tech), Mr. V. Jananesan, Assistant Director, and Mr. Binoy. E. B., Assistant Director. Mr. Roozbeh Daruwalla, Regional President, SEAI, Maharashtra and exporters from Maharashtra region also participated in the meeting.

SEAI has raised various issues faced by the exporters with respect to trade and Joint Secretary assured that the issues would be considered and appropriate actions would be taken at the earliest.

Hyderabad

To understand constraints and bottlenecks in exports and to enhance the exports from the region, Mr. Diwakar Nath Misra, Joint Secretary, DoC and Director EIC, Govt of India, had an interactive meeting with the

exporters of Hyderabad on 6th July 2022. The meeting chaired by JS was attended by MPEDA, APEDA, EIA, State Govt officials and exporters of agriculture, spices, minerals, stone, pharmaceutical etc., Different issues raised by other commodity exporters were also discussed.



Mr. Diwakar Nath Misra, Joint Secretary, DoC with Mr. Jeyabal A., Joint Director, MPEDA – Vijayawada



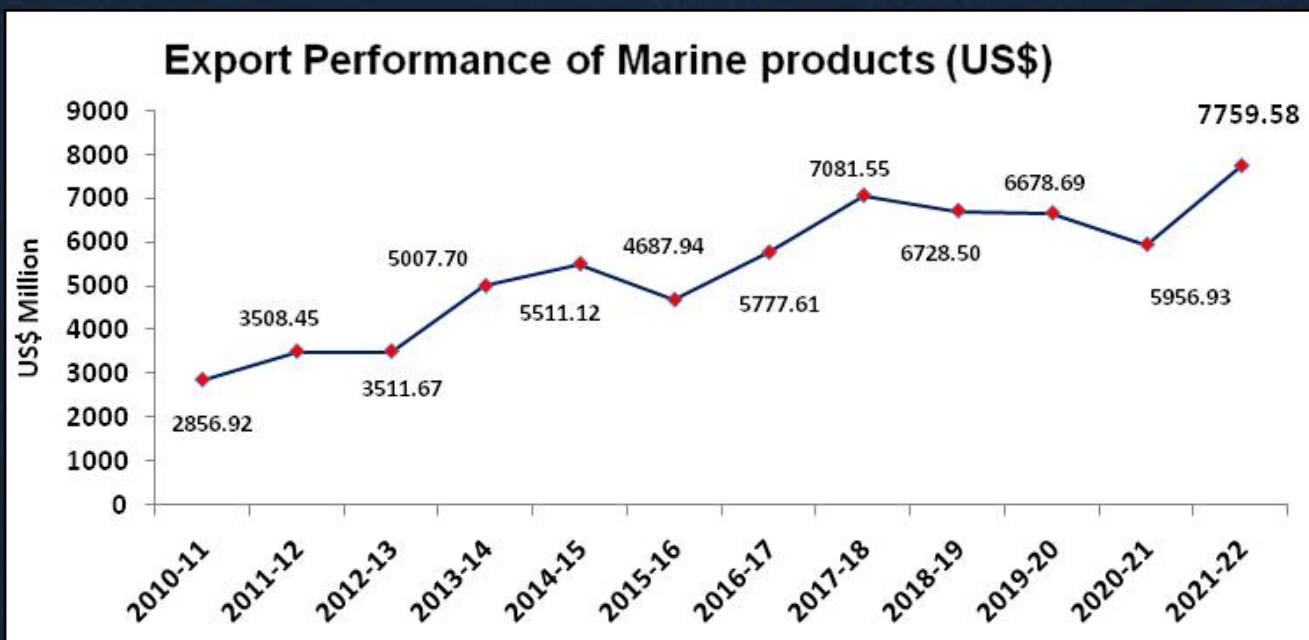
Export performance 2021-2022

During the financial year 2021-22, India exported 13,69,264 MT of marine products worth US\$ 7.76 billion, which is an all time high exports by value. USA and China are the major importers of Indian seafood. Frozen Shrimp continued to be the major export item. Export summary are given in the table 1. Despite heavy odds, the seafood sector performed exemplarily during 2021-22.

The seafood export during the year has increased by 31.71% in rupee value, 30.26% in US dollar value and 19.12% in quantity. The unit value also increased by 9.36% from 5.18 to 5.67.

The export performance of marine products since 2010-11 is given in figure 1.

Table1: Export Performance During 2021-22 compared to 2020-21			
Export Details	2021-22	2020-21	Growth %
Quantity in Tons	13,69,264	11,49,510	19.12
Value in Crores	57,586.48	43,720.98	31.71
US\$ in Million	7,759.58	5,956.93	30.26
Unit Value (US\$/Kg)	5.67	5.18	9.36



Aquaculture sector has performed better this year as evident from the figures given in table 2. The aquaculture sector has contributed 69.84% of exported items in terms of US\$ value and 48.63% in terms of quantity which is 1.79% and 2.28% more respectively compared to 2020-21. The percentage share of aquaculture products had shown increase in both quantity and US\$ value in 2020-21 .

The unit value of aquaculture products increased marginally by 0.53 US\$/kg from 7.61 to 8.14 US\$/kg.

Contribution of capture fisheries reduced from 53.65% to 51.37% in quantity and from 31.95% to 30.16% in US\$ value. The unit value of wild caught items also increased marginally from 3.09 to 3.33 US\$/kg.

MAIN STORY

Table 2: Contribution of aquaculture and capture fisheries

	Aquaculture (%)		Capture Fisheries (%)	
Year	2020 -21	2021 -22	2020 -21	2021 -22
Quantity	46.35	48.63	53.65	51.37
Value in Rs	68.13	68.93	31.87	31.07
Value in US\$	68.05	69.84	31.95	30.16

Major item - wise exports

Frozen shrimp continued to be the major item of export in terms of quantity and value, accounting for a share of 53.18% in quantity and 75.11% of the total US\$ earnings. The unit value increase of frozen shrimp was observed at 6.75% from US\$ 7.5 to 8.00 per kg. Shrimp exports during the period increased 31.68% by US\$ value, 31.32% by rupee value and 23.35% by quantity.

The overall export of shrimp during 2021-22 was 7,28,123 MT worth US\$ 5,828.59 million which is all time high in both quantity and value. USA is the largest importer (3,42,572 MT) of frozen shrimp followed by China (1,25,667 MT), European Union (90,549 MT), South East Asia (44,683 MT), Japan (38,492 MT), and Middle East (37,158 MT) in that order. Rest of the countries took 49,002 MT.

The export of Vannamei shrimp has increased 25% from 5,15,907 MT to 6,43,037 MT in 2021-22. Out of the total Vannamei shrimp exports, in US\$ value terms, about 59.05% was exported to USA followed by 14.59% to China, 8.16% to European Union, 4.78 % to South East Asia, 3.61 % to Japan, 3.17 % to Middle East and 6.64% to other Countries.

For Black Tiger shrimp also, USA is the major market with a share of 25.90% in terms of US\$ value followed by EU (23.78%), Japan (22.71%) and Middle East (9.17%) , South East Asia (8.53%), China (3.86%) and Others (6.05%). Black tiger shrimp exports also

drastically increased by 76% from 9,819 MT to 17,231 MT due to the increased production during 2021-22 period.

Other Items constituted mostly by Surimi and Surimi analogue (imitation) products, was the second largest category by US\$ value that shown a growth of 43.80%, 42.94% and 24.09% by rupee, US\$ value and quantity. Surimi and surimi analogue products contributed 69.85% in quantity and 56.55% by value in other items category.

Frozen fish is at the third largest position, accounting for a share of 16.55% in quantity and 6.08% in US\$ earnings. The export of frozen fish has increased by 20.44%, 18.03% and 17.19% in quantity, rupee and US\$ value terms respectively.

Frozen squid also showed a positive trend in exports with 40.38%, 40.24% and 23.82% increase in terms of rupee value, value US\$ earnings, and quantity respectively. Unit value of realization has been increased by 13.26% from US\$ 4.47 to 5.06 per kg. Frozen Cuttlefish has shown a growth of 26.83% in value rupee terms and 26.18% in value US\$ terms. Unit value realization has also been increased by 26.82% from US\$ 3.74 to 4.75 per kg. Export of dried items increased 28.27% by rupee value but declined by 8.59% in US\$ value terms. Unit value of dried items increased by 6.28% from US\$ 1.83 to 1.95 per kg. Chilled items also showed an increase of 23.08% and 53.45% in terms of quantity and rupee value, but decreased by -1.87% in US\$ terms. Live Items have shown a positive export trend of 60.57%, 47.43% and 46.67% in terms of quantity, rupee and US\$ value respectively mainly due to the increased exports of ornamental fish. The details of major items of exports are given in the table 3.

It is pertinent to note that Tilapia and Ornamental fish have performed well in exports during 2021-22. Exports of Tilapia increased by 56.31% in quantity and 60.06% in US\$ value, while that of ornamental fishes swelled respectively by 312.42% in quantity and 153.54% increase in US\$ earnings. Scampi exports grew by 57.33%, 45.18% and 44.40% in terms of quantity, rupee and US\$ respectively. Crab exports (excluding imitation products) also showed a growth of 25.94%, 120.95% and 120.01% in terms of quantity, rupee and US\$ respectively. However, tuna exports showed a slight decline in quantity and value.

MAIN STORY

Table 3: Item- wise export details during 2021-22

Q: Quantity in Tons, V: Value in Rs. Crores, \$: US\$ Million, UV\$:US\$/Kg

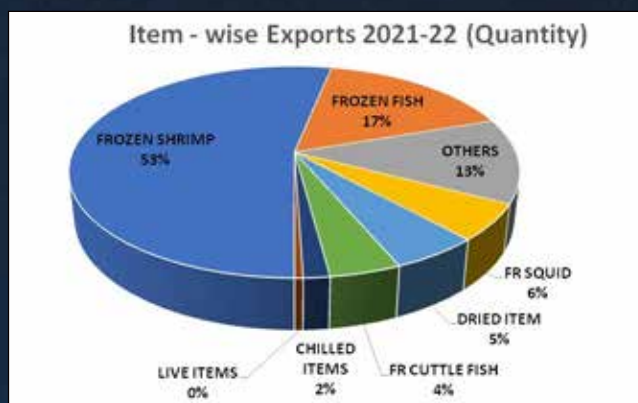
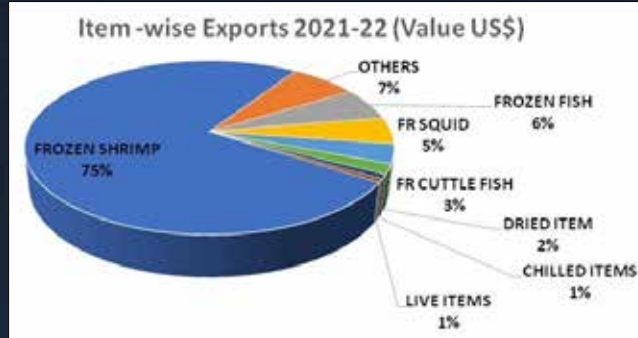
ITEM		Share %	2021 - 22	2020 - 21	Growth (%)
FROZEN SHRIMP	Q:	53.18	728123	590275	23.35
	V:	74.16	42706.04	32520.29	31.32
	\$:	75.11	5828.59	4426.19	31.68
	UV\$:		8.00	7.50	6.75
FROZEN FISH	Q:	16.55	226586	188130	20.44
	V:	6.03	3471.91	2941.65	18.03
	\$:	6.08	471.45	402.31	17.19
	UV\$:		2.08	2.14	-2.70
FR CUT-TLE FISH	Q:	4.31	58992	59292	-0.51
	V:	3.58	2062.63	1626.34	26.83
	\$:	3.61	280.08	221.97	26.18
	UV\$:		4.75	3.74	26.82
FR SQUID	Q:	5.53	75750	61176	23.82
	V:	4.87	2806.09	1998.90	40.38
	\$:	4.94	383.37	273.37	40.24
	UV\$:		5.06	4.47	13.26

DRIED ITEM	Q:	5.38	73679	85661	-13.99
	V:	2.56	1472.98	1148.38	28.27
	\$:	1.85	143.46	156.94	-8.59
	UV\$:		1.95	1.83	6.28
LIVE ITEMS	Q:	0.51	7032	4379	60.57
	V:	0.61	353.36	239.69	47.43
	\$:	0.62	47.98	32.72	46.67
	UV\$:		6.82	7.47	-8.66
CHILLED ITEMS	Q:	1.58	21689	17622	23.08
	V:	1.27	733.47	477.99	53.45
	\$:	0.82	63.92	65.14	-1.87
	UV\$:		2.95	3.70	-20.28
OTHERS	Q:	12.96	177414	142975	24.09
	V:	6.91	3979.99	2767.74	43.80
	\$:	6.97	540.73	378.30	42.94
	UV\$:		3.05	2.65	15.19
TOTAL	Q:	100.00	1369264	1149510	19.12
	V:	100.00	57586.48	43720.98	31.71
	\$:	100.00	7759.58	5956.93	30.26
	UV\$:		5.67	5.18	9.36

MAIN STORY

Table 4: Export performance of some species

Year		2020-21	2021-22	Growth %
Tilapia	Qty MT	2489	3890	56.31
	Rs Cr	18.89	30.49	61.40
	US\$ Mln.	2.59	4.14	60.06
Ornamental fish	Qty MT	54	222	312.42
	Rs Cr	13.08	33.33	154.83
	US\$ Mln.	1.79	4.54	153.54
Tuna	Qty MT	41586	37526	-9.76
	Rs Cr	384.10	375.35	-2.28
	US\$ Mln.	52.40	50.83	-3.00
Scampi	Qty MT	1972	3102	57.33
	Rs Cr	269.75	391.62	45.18
	US\$ Mln.	36.85	53.21	44.40
Crab	Qty MT	5509	6938	25.94
	Rs Cr	398.34	880.11	120.95
	US\$ Mln.	54.33	119.53	120.01



Market-wise exports

India exported marine products to 123 countries during 2021-22

USA retained the title as the major importer of Indian seafood with a share of 43.45% in terms of US\$. USA imported 3,72,611 MT of seafood in the current financial year. Export to USA has showed a growth of 37.56%, 36.76% and 27.63% in US\$ value, rupee value and quantity terms. Frozen shrimp continued to be the principal item exported to USA with a share of 93.33% in US\$ value. Exports of Vannamei shrimp to USA showed a growth of 34.65% in US\$ terms, 33.94% in rupee value and 26.81% in quantity. Black Tiger Shrimp exports to USA also increased by 68.99%, 151.78% and 152.06% in terms of quantity, rupee value and US\$ terms respectively.

China continued to be the second largest market destination for Indian seafood with a share of 15.14% in US\$ earnings and 19.5% in quantity terms. China imported 2,66,989 MT of seafood worth US\$ 1175.05 million. The export to China has shown a positive trend of 31.09%, 25.12% and 22.28% in rupee value, US\$ and quantity terms respectively. Frozen shrimp is the major item of exports to China accounting a share of 47.07% in quantity and 67.04% in US\$ earnings.

MAIN STORY

Table 5: Market - wise export details during 2021-22

Q: Quantity in Tons, V: Value in Rs. Crore, \$: US\$ Million

Market		Share %	2021-22	2020-21	Growth (%)
JAPAN	Q:	6.60	90308	86814	4.02
	V:	5.63	3242.94	3033.36	6.91
	\$:	5.68	440.77	412.11	6.95
USA	Q:	27.21	372611	291948	27.63
	V:	42.72	24603.34	17990.40	36.76
	\$:	43.45	3371.66	2451.04	37.56
EUROPEAN UNION	Q:	14.50	198484	152770	29.92
	V:	14.88	8570.05	6022.83	42.29
	\$:	14.98	1162.17	821.83	41.41
CHINA	Q:	19.50	266989	218343	22.28
	V:	15.73	9056.70	6908.63	31.09
	\$:	15.14	1175.05	939.17	25.12
SOUTH EAST ASIA	Q:	17.78	243401	217710	11.80
	V:	9.98	5747.98	4876.05	17.88
	\$:	10.04	779.28	665.60	17.08
MIDDLE EAST	Q:	4.27	58426	48606	20.20
	V:	3.88	2235.53	1843.39	21.27
	\$:	3.91	303.12	251.13	20.70
OTHERS	Q:	10.15	139045	133319	4.29
	V:	7.17	4129.95	3046.32	35.57
	\$:	6.80	527.53	416.05	26.79
Total	Q:	100.00	1369264	1149510	19.12
	V:	100.00	57586.48	43720.98	31.71
	\$:	100.00	7759.58	5956.93	30.26

MAIN STORY

European Union remained at the third position with a share of 14.98% in US\$. The export to EU has shown a positive trend of 42.29%, 41.41% and 29.92% in rupee value, US\$ terms and quantity respectively. Frozen shrimp continued to be the major item of exports to EU accounting for a share of 45.62% in quantity and 56.59% in US\$ earnings out of the total exports to EU. Export of frozen shrimp to EU increased by 37.09% and 29.11% in US\$ value and quantity.

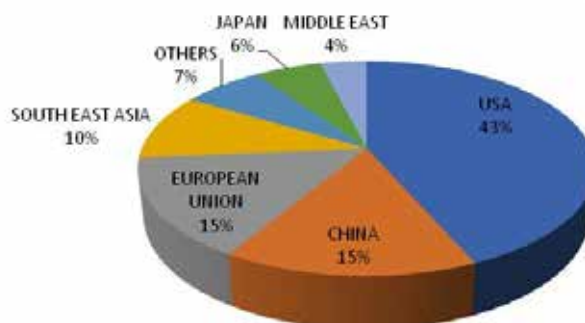
South East Asia is the fourth largest market destination of Indian marine products accounting for a share of 10.04% in US\$ terms. The export to South East Asia has shown a positive trend of 17.88%, 17.08% and 11.80% in rupee value, US\$ terms and quantity respectively. Frozen shrimp is major item in this market with share of 36.81% with growth of 22.29% in US\$ terms.

Japan is the fifth largest destination for Indian Seafood with a share of 5.68% in US\$ earnings and 6.60% in quantity terms. Exports to Japan have shown a positive growth of 6.95% in US\$ value term, 6.91% in rupee value terms and 4.02% in quantity terms. Frozen Shrimp continued to be the major item of exports to Japan accounting a share of 74.55% in US\$ earnings and 42.62% in quantity. Exports of frozen shrimp to Japan increased by 3.73% in US\$ and 3.33% in rupee terms. Middle East is the sixth largest destination for Indian seafood with a share of 3.91% in US\$ value terms. This market has shown an increase of 21.27%, 20.70% and 20.20% by rupee value, US\$ value, and in quantity terms respectively. Frozen shrimp continued to be the major item of exports to Middle East accounting a share of 76% in US\$ earnings with growth of 27%.

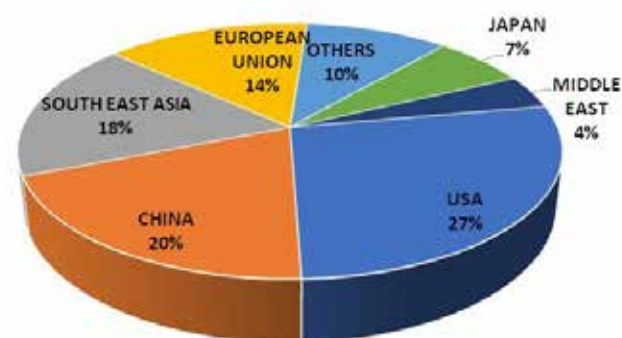
Other Countries showed an increase of 35.57%, 26.79% and 4.29% in rupee value, US\$ value and quantity respectively. The other countries export basket contributed to a share of 6.8% in US\$ terms. Among other countries Canada (36.21%), Russia (19.46%), Bangladesh (5.34%), Dominican Republic (5.16%), Tunisia (4.56%), together contributed 70.72% in US\$ terms.

In the cluster of other countries also Fr. Shrimp was major item with export share of 74.05% and growth of 35.30% by US\$ terms. The details on major markets for Indian marine products are given in the table 5.

Market - wise Exports 2021-22 (US\$ Value)



Market - wise Exports 2021-22 (Quantity)



Major port -wise exports

The top 5 ports which handled marine products cargo in 2021-22 were Vizag, Kolkata, Kochi, Chennai and JNPT contributing 69.65% share in US\$ terms. The details are shown in table 6 below:

Table 6: Port - wise export details during 2021-22

Port	Qty MT	Rs Cr.	US\$ Mln.	% Share US\$
Vizag	247755	15648.62	2125.55	27.39
Kolkata	121339	6168.78	854.37	11.01
Kochi	175332	6167.69	849.57	10.95
CHENNAI	112356	5947.20	807.86	10.41
JNPT	182046	5643.81	767.50	9.89
Others	530437	18010.39	2354.73	30.35
Total	1369264	57586.48	7759.58	100

Outlook for 2022-23

Department of Commerce has fixed an ambitious target of US\$ 8,868 million for marine products export for 2022-23, which require a growth rate of about 15% over the previous year to achieve the target.



The background image shows three snakehead fish in an aquarium. One large snakehead is at the top, swimming towards the right, with a dark body and a prominent white stripe along its side. Below it, on the left, is another snakehead with a yellowish-gold body and dark spots. On the right, there is a smaller, more colorful snakehead with blue, orange, and red patterns. The background is filled with green artificial aquarium plants.

Snakeheads: The exotic friends for your aquarium

**V. K. Dey**

V. K. Dey has over three decades of experience in diverse sectors of seafood industry in Asia-Pacific region. He was the Deputy Director of MPEDA and then associated with INFOFISH, Malaysia. As part of INFOFISH, he was involved in several studies related to seafood industry in the Asia-Pacific region and beyond, including setting up of Aqua-technology Park for ornamental fish. MPEDA has published Living Jewels, a collection of his articles on ornamental fish.

The snakehead are characterized by their torpedo shaped body, large scale plated head and long dorsal and anal fins. The accessory breathing organ which enables them to breathe atmospheric air, is situated in the upper part of the gill chamber. They are the members of the family Channidae, found in Africa and Asia. Snakeheads are known to show parental care on their brood and daring to challenge large animals when their young ones are threatened. Though there are about 28 species of Channa are known today, *C. bleheri*, *C. burmanica*, *C. gachua*, *C. micropeltes*, *C. lucius*, and *C. orientalis*, are well known in the aquarium trade. *C. bleheri* is widely known as the rainbow snakehead because of its body colouration. It originates from the upper region of north eastern India, particularly in the Brahmaputra river basins of Assam. This beautiful fish is shaped like a large cigar with fins. The ventral fins having a pattern with blue dorsal edged in a brilliant orange. In aquarium conditions the fish needs plenty of space to move around with plants and hiding places. They need surface access to get the air. The ideal water conditions could be with a temperature between 22 – 28°C and pH ranges between 6 and 7.5. They accept live, frozen and also meaty food. They could be bred in aquariums. The males are larger than the female. The eggs floats are guarded by both the parents. The fry feeds on mucus secreted by the parents. Though the fry does not require the mucus to survive it is said to promote faster growth.

C. burmanica or popularly known as Burmese snakehead is originates from the Putao plains of northern Myanmar. They very closely resemble *C. bleheri* in appearance.

C. gachua or dwarf snakehead found in rainforest streams of Sri Lanka. They also found Southeastern Iran, Eastern and Western Pakistan and Southern China. It is said to be the most suitable Channa species for aquarium and one of the smallest and prettiest among the snakeheads. It has characteristically reddish dorsal and anal fins and a distinctly marked pectoral fin. The ideal water temperature would be between 24 – 28°C with pH between 6 – 7.5. They require relatively well planted larger aquarium with open areas and

hiding places. They accept meaty food. They are mouth brooders and one of the easiest snakehead species to breed in aquarium.

C. lucius, or forest snakehead, considered to be an endangered among snakeheads, found in forest streams and peat swamps. They have a distinct series of porthole markings on the side and has a more tapering head compared to other species. The juvenile fish appear very different from the adult in coloration.

C. micropeltes or giant snakehead or red snakehead is the largest of all snakeheads and is cultured commercially as a food fish. They originate from Asia including India, Thailand, Myanmar and Malaysia. They are desirable for aquarium hobby particularly when young ones displaying vivid colouration with red being the most dominant. They like slightly warmer water at around 26-27°C while general hardness and pH values are not critical.

C. orientalis, better known as smooth-breasted snakehead, is a native of south western Sri Lanka. It is very colourful fish and found in its natural habitat as clean fresh water pools to streams. It is best kept in aquarium with filtered water. The colouration of the dorsal fin is a pale olive brown displaying in the middle, a bluish green band. The outer margin is orange and the tips of the rays, light in colour, body bands cross in the latter part. The round caudal fin is pale yellow in colour with seven dark transverse stripes which would be luminous blue sometimes, The orange coloured pectoral fin have 4 – 7 transverse stripes. The upper body is light brownish with 10 – 13 dark bars across the back. The mid lower section is olive brown ventrally, the belly and throat colouration being bluish green. There are also dark W shaped transverse bands in the flanks. The head has a dark lateral line from the snout, through the eye, to the opercle. Several other lines cross the crown of the head. Occasionally a series of minute black spots are seen on the sides. Water temperature between 24 – 26°C is preferred with pH between 6.3 and 6.5. They could take worms and small fishes in aquarium conditions. They could be bred in captivity. The eggs are floated and orally incubate eggs by the male.



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Details of the SPF *P. vannamei* brooders imported & quarantined at AQF during June 2022

Sl.No	Name of the stake-holders	State	Country of origin/supplier	Date of receipt of the lot at AQF arrival	Broodstock imported (nos)		
					Male	Female	Total
1	NSR Hatcheries - Prakasam	Andhra Pradesh	Kona Bay; Hawaii	03.06.22	200	200	400
2	Sri Mahalakshi Hatcheries - Nellore	Andhra Pradesh	Kona Bay; Hawaii	03.06.22	300	300	600
3	NSR Hatcheries	Andhra Pradesh	Kona Bay; Hawaii	03.06.22	200	200	400
4	SB Marines	Andhra Pradesh	Kona Bay; Hawaii	03.06.22	400	400	800
5	Om Maritech Pvt. Ltd	Andhra Pradesh	Kona Bay; Hawaii	03.06.22	400	400	800
6	Aqua Star Shrimp Hatchery	Tamil Nadu	SIS; Florida	04.06.22	200	200	400
7	Alpha Hatchery	Andhra Pradesh	SIS; Florida	04.06.22	200	200	400
8	Sun Glow Marine	Tamil Nadu	SIS; Florida	04.06.22	200	200	400
9	Bindu Hatcheries	Andhra Pradesh	SIS; Florida	04.06.22	300	300	600
10	Sai Marine Exports Pvt. Ltd	Andhra Pradesh	SIS; Florida	05.06.22	600	600	1200
11	Devi Seafoods Ltd	Andhra Pradesh	Benchmark Genetics; Florida	06.06.22	300	300	600
12	Jay Jay Aqua Farms	Tamil Nadu	SIS; Florida	08.06.22	200	200	400

AQUACULTURE SCENE

13	Raj Hatcheries Madras Pvt. Ltd	Tamil Nadu	SIS; Florida	11.06.22	300	300	600
14	B Tech Hatcheries	Andhra Pradesh	SIS; Florida	11.06.22	400	400	800
15	Empire Marine Harvest	Tamil Nadu	SIS; Florida	11.06.22	180	180	360
16	Krishna Godavari Aquatech Pvt. Ltd	Andhra Pradesh	SIS; Florida	12.06.22	300	300	600
17	Star Aqua Hatchery	Tamil Nadu	SIS; Florida	12.06.22	200	200	400
18	Sri Mahalakshi Hatcheries -Visag	Andhra Pradesh	SIS; Florida	15.06.22	600	600	1200
19	Vaisakhi Bio-Marine Pvt. Ltd - Unit II	Andhra Pradesh	SIS; Florida	17.06.22	500	500	1000
20	Sri Venkataramaraju Hatcheries	Andhra Pradesh	SIS; Florida	18.06.22	300	300	600
21	Priyanka Enterprises	Andhra Pradesh	SIS; Florida	18.06.22	300	300	600
22	Vandayar Hatchery	Tamil Nadu	Kona Bay; Hawaii	20.06.22	200	200	400
23	Aditya Bio Resources	Andhra Pradesh	Kona Bay; Hawaii	20.06.22	300	300	600
24	NSR Aqua Farms Pvt. Ltd	Andhra Pradesh	Kona Bay; Hawaii	20.06.22	600	600	1200
25	KPR Hatchery	Andhra Pradesh	SIS; Florida	22.06.22	300	300	600
26	Sri Venkateswara Shrimp Hatcheries Pvt. Ltd	Andhra Pradesh	SIS; Florida	25.06.22	600	600	1200
27	SS Hatcheries - Unit II	Andhra Pradesh	SIS; Hawaii	27.06.22	212	212	424
28	Blue Star Marines	Andhra Pradesh	Benchmark Genetics; Florida	28.06.22	210	210	420
29	BKMN Aqua	Andhra Pradesh	SIS; Florida	29.06.22	400	400	800
TOTAL					9402	9402	18804



Government of West Bengal constituted a Task Force Committee for prevention of banned antibiotic usage in aquaculture

Antimicrobial resistance is a global public health challenge, which is accelerated by the misuse or overuse of antibiotics worldwide. Several efforts are taken at Government level to restrict the availability and use of antibiotics in all food producing animals, including aquaculture shrimp.

Government of West Bengal has issued an Order on 25-07-2022, notifying the constitution the formation of a Task Force Committee for prevention of banned antibiotic usage in aquaculture in the State. District Magistrate will be the Chairman of this multi-disciplinary

Committee with representatives from Department of Fisheries, Drug Control Authority, Food safety department, Revenue department, Police department, MPEDA as well as stakeholders. The Task force Committee is empowered to conduct raids in shops of aquaculture inputs and aquaculture production units for unauthorized possession of products, to collect samples of various inputs and to take action on the defaulters. Similar Government Order has already been issued by the states of Andhra Pradesh, Odisha, Karnataka, Kerala, Tamil Nadu and Maharashtra.



MPEDA- SRD Nagapattinam conducts antibiotic campaign at Mayiladuthurai



Participants of the training programme at Mahendrapalli

Antibiotics campaigns are organized by MPEDA in order to spread the awareness on abuse of banned antibiotics, veterinary medicines and chemicals in aquaculture.

Farmers are also enlightened on the importance of farm enrollment with MPEDA, traceability, requirements of farm enrollment, e- santa and cooperative society registration during the campaign.



Participants of the training programme at Thirukazhipalai



Participants of the training programme at Kothandapuram



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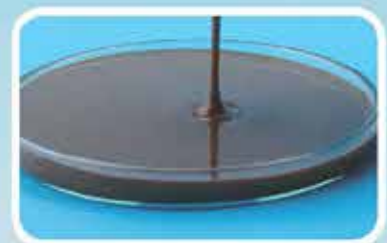
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MPEDA hosts Seafood HACCP Train the Trainer course



Participants of Seafood HACCP TTT course

MPEDA in association with United States Food and Drug Administration (USFDA) and Joint Institute for Food Safety and Applied Nutrition (JIFSAN) organized four - day Seafood HACCP Train the Trainer course from 20-23 June 2022. The training programme was inaugurated by Director, MPEDA Dr. M. Karthikeyan on 20th June 2022. Dr. Pankaja Panda, Food Safety Coordinator, USFDA India office delivered the key note address.

The Seafood HACCP Train the Trainer course is a Seafood HACCP course developed by Association of Food and Drug Officials and the Seafood HACCP Alliance. The participants of Train the Trainer course had already completed a two part course that includes self paced Seafood HACCP: Internet Training Course and live Segment 2 training taught by Seafood HACCP Alliance instructors. Only a selected few participants from those who successfully completed the two part seafood HACCP course were approved to participate in the four days Train the Trainer course. MPEDA organized 2 batches of segment 2 course in Kochi during the year 2022. The first batch was conducted on 21 & 22 April 2022 and the second batch was conducted on 25 & 26 April 2022.

The Train-the-Trainer course focused on actual training practices, materials, and requirements for “approved” participants to be recognized as “qualified” Seafood HACCP Alliance instructors. The qualified trainers



Dr. M. Karthikeyan, Director MPEDA delivering the inaugural address

after the training are allowed to conduct the standard Seafood HACCP Alliance training for Basic and Segment Two HACCP courses and the accompanying Sanitation Control Procedures Course (SCP) in accordance with the established protocols maintained and recorded by Seafood HACCP Alliance/ Association of Food and Drug Officials. As part of the screening procedure for the training, all applicants were reviewed to assure experience and intentions to conduct the standard training courses.

The training sessions were handled by experienced instructors from JIFSAN namely Brett Koonse, Doris T. Hicks , Christina A. M. DeWitt and Alexandra C. M. de Oliveira. 20 participants including officials from MPEDA, EIA, CIFT, KUFOS, CUSAT, M.E.S Asambi College were trained. The participants who successfully completed the train the trainer course are now eligible to conduct the standard Seafood HACCP Alliance training for Basic and Segment Two HACCP courses.



MPEDA QC Lab, Kochi organized hands-on training on antibiotic screening



Dr. Ram Mohan M.K., Joint Director (QC) & CEO, MPEDA Labs interacts with the participants during the concluding session

Excessive use of antibiotic in aquaculture in many countries has created problems and concerns due to the development and dissemination of bacterial resistance, food safety hazards and environmental issues. According to the decision by regulatory authorities in India, mini laboratories functioning in seafood industry are to be equipped with ELISA readers, and have to screen banned antibiotics such as Chloramphenicol and Nitrofurans metabolites in farmed shrimps meant for exports to non-EU countries.

MPEDA took an initiative to organize hands-on training programs for strengthening the skills of technical persons who are dealing antibiotic screening. As part of that, MPEDA QC Laboratory, Kochi has organized a 3-day hands-on training programme for the first time. Five selected technologists from various seafood units were given training from 13th to 15th June 2022. Theory and practical classes detailing the fundamentals of ELISA technique, sample extraction, calculation of reference standards and operation of ELISA machine



View of the participants and trainers

etc. were handled by experts from MPEDA Kochi laboratory. Technologists were also trained for the method validation of screening methods as per the new EU Regulation Commission Implementing Regulation (EU) 2021/808 as regards transitional provisions for certain substances listed in Annex II to Decision 2022/657/EC. Dr. Ram Mohan M.K., Joint Director (QC) and Chief Executive Officer of MPEDA laboratories distributed certificates to the trainees.



MPEDA organizes one day training on Import Operations Requirements in association with USFDA and JIFSAN



MPEDA in association with United States Food and Drug Administration (USFDA) and Joint Institute for Food Safety and Applied Nutrition (JIFSAN) organized one day training on FDA Import Operations Requirements on 24th June 2022.

The training programme was attended by 35 participants including representatives from Indian seafood industry representing the leading exporters to USA and officials from MPEDA.

The training programme covered the basic import process, FDA data elements, food facility registration, additions and removals from import alert, private laboratory analytical packages, general food labeling

requirements, Food Safety Modernization Act overview, Automated Commercial Environment or ACE and PREDICT-Predictive Risk-based Evaluation for Dynamic Import Compliance Targeting.

The basic objective of the training was to provide targeted training to increase knowledge and understanding of FDA's importation process to help inform industry stakeholders in India who are exporting food products to the US and to increase compliance with FDA regulations for imported products. The training sessions were handled by Ms. Cindy Ford, Consumer Safety Officer, USFDA, Mr. Stanley Serfling, Consumer Safety Officer, USFDA and Mr. Brett Koonse, Aquaculture and Seafood Safety Expert, JIFSAN.



MPEDA -RD Mangalore organised training programme on seafood HACCP



Inauguration of the training programme



A training programme on Seafood Basic HACCP was organized by MPEDA from 28th June to 1st July 2022 in Mangalore. A total of 34 participants representing the export units from Karnataka and Goa were attended the programme. The training was inaugurated by Dr. Shivakumar Magada, Dean, College of Fisheries, Mangalore, who appreciated MPEDA in organizing such a training programme for the seafood export sector. Mr. Sudhansu Sekhar Das, Assistant Director, EIA, Mangalore during his felicitation address, requested the participants to make use of the opportunity to streamline the plant operations so as to produce and supply quality from the country.

Mr. Premdev K. V., Deputy Director, RD Mangalore pointed out that the QC team of the plant should be aware of the health hazards and possible rejections and they should follow the SOP to formulate strategies to prevent, eliminate or reduce health hazards during the process flow. The course structure was explained by Mr. Vinod V., Deputy Director (QC), MPEDA. The inaugural session of the training programme was concluded with the vote of thanks by Dr. Ganesh K., Assistant Director, MPEDA.

Mr. Vinod V, Deputy Director (QC), MPEDA, Kochi, Mr. Subray Pavar, Assistant Director, MPEDA, Mumbai & Mrs. Preetha Pradeep, Technical Officer (QC), MPEDA, Kochi were the faculties for the four day training programme. Introduction to HACCP, Good Manufacturing Practices, Sanitation Standard Operating Procedures, Principles of HACCP, US Seafood regulation, Traceability, Development of HACCP Plan, Guidelines for preparation of HACCP manual etc. were



Dr. Shivakumar Magada, Dean, College of Fisheries, Mangalore delivers inaugural address



The participants with faculty

elaborated during the four- day training session. The participants were assigned with practical session on preparation of SSOP documents, HACCP worksheet and development of HACCP plan for different seafood products as per their finished products in the plant. The practical session was followed by an assessment. The training programme concluded by a valedictory function in which Mr. Premdev K. V., Deputy Director distributed the certificates to the trainees.



MPEDA-NETFISH, Chennai conducts Dry Fish training program



NETFISH – MPEDA RD, Chennai conducted Dry Fish training program for hygienic handling and preparation of dry fish at Pazhaverkadu (Pulicat) Landing Centre on 29.06.2022. 20 dry fish workers

participated in the training program in the Office of the Department of Fisheries, Govt of Tamil Nadu, Pazhaverkadu.





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MPEDA Officials awarded MACP

Sl. No.	Name	Designation
1.	Dr. T. R. Gibin Kumar	Deputy Director
2.	Dr. Shine Kumar C.S.	Deputy Director
3	Mr. S. Asok Kumar	Deputy Director
4	Mr. Premdev K.V.	Deputy Director
5	Mrs. Elsamma Ithack	Deputy Director
6	Mrs. Tulsi Nair	Assistant Director (OL)
7	Mr. K. Rajendramany	Assistant Director (Retired)

8	Dr. K. Iyyappan	Junior Technical Officer(Aqua)
9	Mr. S. Arul Raj	Junior Technical Officer(Aqua)
10	Mr. Kanchan Arora	Accounts Assistant
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Southern Shrimp Alliance wants US to maintain tariffs on Chinese imports



The Southern Shrimp Alliance has called on the U.S. government to continue a 25 percent tariff on Chinese seafood imports, saying the additional levy has helped domestic producers “compete on a more-level playing field.”

The trade organization made its stance known in a Thursday, 30 June letter to U.S. Trade Representative Katherine Tai. Four years ago, former U.S. President Donald Trump implemented Section 301 tariffs on an array of Chinese goods in response to that country’s policies regarding intellectual property and technology transfer. The U.S. government is currently conducting a two-phase review of the action, with Tuesday, 5 July the cutoff date for comments.

In the 11-page letter, SSA Executive Director John Williams said the trade action has forced U.S. importers to “wean themselves” off shrimp products that use significant amounts of antibiotics banned in the U.S. “The shift away from Chinese sourcing has not only improved the ability of U.S. seafood producers, like those in our industry, to compete on a level playing

field, but has further reduced risks to consumers and improved the quality of the fish available for sale in our market,” Williams said. What it has not done, though, is reduce the impact imports have on the U.S. seafood industry. While Chinese seafood imports have declined from USD 2.8 billion (EUR 2.7 billion) in 2018 to USD 1.6 billion (EUR 1.5 billion) in 2021, U.S. seafood imports from elsewhere rose from USD 19 billion (EUR 18.5 billion) to USD 25.8 billion (EUR 25.2 billion) over the same timeframe.

In a statement, Williams said ending the additional tariff now “makes absolutely no sense” given the current economic state of U.S. shrimpers, who still must contend with cheaper imports as well as rising fuel costs.

“It wouldn’t just kick us while we were down, it would also undo everything that has been achieved in weaning U.S. importers off of cheap, contaminated, unsafe farmed seafood from China,” he said.

www.seafoodsource.com



Record fisheries and aquaculture production makes critical contribution to global food security

Ignificant growth in aquaculture has driven global fisheries and aquaculture production to a record high as aquatic foods make an increasingly critical contribution to food security and nutrition in the 21st century, according to a report from the UN Food and Agriculture Organization (FAO) released today.

The 2022 edition of The State of World Fisheries and Aquaculture (SOFIA) says the growth of aquaculture, particularly in Asia, lifted total production of fisheries and aquaculture to an all-time high of 214 million tonnes in 2020, comprising 178 million tonnes of aquatic animals and 36 million tonnes of algae.

Production of aquatic animals in 2020 was 30 percent higher than the average in the 2000s and more than 60 percent above the average in the 1990s. Record aquaculture output of 87.5 million tonnes of aquatic animals largely drove these outcomes.

As the sector continues to expand, FAO says more targeted transformative changes are needed to achieve a more sustainable, inclusive and equitable fisheries and aquaculture sector. A 'Blue Transformation' in how we produce, manage, trade and consume aquatic foods, is crucial if we are to achieve the UN Sustainable Development Goals.

"The growth of fisheries and aquaculture is vital in our efforts to end global hunger and malnutrition but further transformation is needed in the sector to address the challenges," says FAO Director General, QU Dongyu. "We must transform agrifood systems to ensure aquatic foods are sustainably harvested, livelihoods are safeguarded and aquatic habitats and biodiversity are protected."

Aquatic foods are contributing more than ever before to food security and nutrition. Global consumption of aquatic foods (excluding algae) has increased at an

average annual rate of 3.0 percent since 1961, almost twice that of annual world population growth – reaching 20.2 kg per capita, more than double the consumption in the 1960s.

Over 157 million tonnes – or 89 percent of aquatic animal production, were used for direct human consumption in 2020, a slightly higher volume than in 2018, despite the impact of the COVID-19 pandemic. Aquatic foods contribute about 17 percent of the animal proteins consumed in 2019, reaching 23 percent in lower-middle-income countries and more than 50 percent in parts of Asia and Africa.

Asian countries were the source of 70 percent of the world's fisheries and aquaculture production of aquatic animals in 2020, followed by countries in the Americas, Europe, Africa and Oceania. China remained the top fisheries producer, followed by Indonesia, Peru, the Russian Federation, the United States, India and Viet Nam.

Aquaculture shapes the future of aquatic foods

Aquaculture has grown faster than capture fisheries in the last two years and is expected to expand further over the next decade. In 2020, animal aquaculture production reached 87.5 million tonnes, 6 percent higher than in 2018. On the other hand, capture fisheries production dropped to 90.3 million tonnes, a fall of 4.0 percent compared with the average over the previous three years.

The reduction in capture fisheries production was mainly driven by the COVID-19 pandemic, which severely disrupted fishing activities, market access and sales, as well as a reduction in China's catches and a fall in the naturally-fluctuating anchoveta catches.

Growing demand for fish and other aquatic foods is

rapidly changing the fisheries and aquaculture sector. Consumption is expected to increase by 15 percent to supply on average 21.4 kg per capita in 2030, driven mostly by rising incomes and urbanization, changes in post-harvest practices and distribution, as well as in dietary trends focusing on better health and nutrition.

Total production of aquatic animals is expected to reach 202 million tonnes in 2030, mainly due to the continuing growth of aquaculture, projected to reach 100 million tonnes for the first time in 2027 and 106 million tonnes in 2030.

The need for a Blue Transformation

FAO says more needs to be done to feed the world's growing population while enhancing the sustainability of stocks and fragile ecosystems and protecting lives and livelihoods in the long-term. According to SOFIA 2022, the sustainability of marine fishery resources remains of significant concern, with the percentage of sustainably fished stocks falling to 64.6 percent in 2019, a 1.2 percent decline from 2017.

However, there are encouraging signs as sustainably fished stocks provided 82.5 percent of the total volume of 2019 landings a 3.8 percent increase since 2017. This seems to indicate that larger stocks are being managed more effectively.

FAO promotes Blue Transformation, a visionary strategy to meet the twin challenges of food security and environmental sustainability while ensuring equitable outcomes and gender equality.

Climate and environment-friendly policy and practices, as well as technological innovation, are also vital for change.

"Blue Transformation is an objective-driven process through which FAO Members and partners can maximize the contribution of aquatic food systems to enhance food security, nutrition and affordable healthy diets, while remaining within ecological boundaries," says Manuel Barange, Director of FAO's Fisheries and Aquaculture Division.

Fisheries and aquaculture contribute to employment, trade and economic development. The total first sale value of fisheries and aquaculture production of aquatic animals in 2020 was estimated at \$406

billion, of which \$265 billion came from aquaculture production. According to the latest data, an estimated 58.5 million people were employed in the sector and of these approximately 21 percent were women. Around 600 million people are estimated to depend on fisheries and aquaculture in some way for their lives and livelihoods. Building resilience is critical for equitable and sustainable development.

Key numbers from The State of World Fisheries and Aquaculture 2022

Production

- Total global production of aquatic animals and algae: 214 million tonnes - First-sale value of aquatic animal production: \$406 billion
- Marine capture fisheries: 78.8 million tonnes
- Freshwater capture fisheries: 11.5 million tonnes
- Animal aquaculture production: 87.5 million tonnes, a new high

Consumption and Trade

- Total amount for human consumption (excluding algae): 157 million tonnes
- Value of international trade of fisheries and aquaculture products: \$151 billion

Employment and Fleets

- Total employed in primary sector of fisheries and aquaculture: 58.5 million, 21 percent women
- Region with the most fishers and fish farmers: Asia (84 percent) - Number of fishing vessels on planet: 4.1 million
- Largest fleet by region: Asia (2.68 million vessels, about two thirds of the global fleet)

Fish Stocks

- Sustainably fished stocks : 64.6 percent (2019), 1.2 percent lower than 2017
- Sustainably fished stocks from total landings: 82.5 percent (2019), up 3.8 since 2017

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