MPEDA

Newsletter

VOL. X NO. 12 MARCH 2023

23rd India International Seafood Show 2023

Import Alert Removal: A Costly and Complex Process

India's Marine Exports: Technologies & the Way Ahead

Exposure Visit for Fishers from Lakshadweep to Kolkata

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On the Platter

Mr. Dodda Venkata Swamy
Chairman

Dear Friends,

February 2023 has brought cheers to the seafood export sector. The first to mention is that China has lifted the indefinite suspension imposed on 99 units due to the alleged detection of Covid 19 nucleic acid material. China acknowledged the source control assurances given by India besides reckoning the compliance reports furnished by the suspended establishments. Relentless efforts by MPEDA, EIC, the Embassy of India, Beijing and the Department of Commerce have yielded fruition and will further the trade with China. GACC will open the CIFER system for those units to apply for renewal of their registration shortly.

The second heartening news came from Qatar, which had imposed a ban on Indian seafood due to the detection of *Vibrio spp.* bacteria in consignments sent by a few Indian exporters.

Qatar has decided to permit the export of frozen seafood from India, subject to third-party certification after the Indian side had justified the measures taken to prevent contamination.

Please recall the UK Mission that inspected our production and processing systems in January 2023. Now, the UK side has relisted 13 establishments, delisted by the European Union, as approved for seafood exports, including aquaculture material. This action by the UK marks a significant variation from the stand taken by the EU and opens up the UK market for those units.

The 23rd India International Seafood Show that concluded in Kolkata last month had an overwhelming response.

One hundred fifty-one exhibitors, including 14 overseas, put up 332 stalls admeasuring a total area of 7000 sq. m. Over 2000 delegates attended the show. All five technical sessions, including a session on seafood trade among G20 countries and another one involving start-ups, were well received by the delegates. The International Buyer Seller Meet organized on the show's sidelines had 28 buyers representing 21 companies from 11 countries. Over 370 business meetings took place, benefitting 82 Indian exporters.

MPEDA participated in the Gulfood during 20th-24th February 2023 along with seven exporters. We have also geared up for participating in Seafood Expo North America in Boston, scheduled from 12th-14th March 2023. Sixteen exporters join the Indian pavilion set up by MPEDA in the show.

Thank you.

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EDITORIAL SUPPORT
Bworld Corporate Solutions Pvt Ltd
166, Jawahar Nagar, Kadavanthra
Kochi, Kerala, India 682 020
Phone: 0484 2206666
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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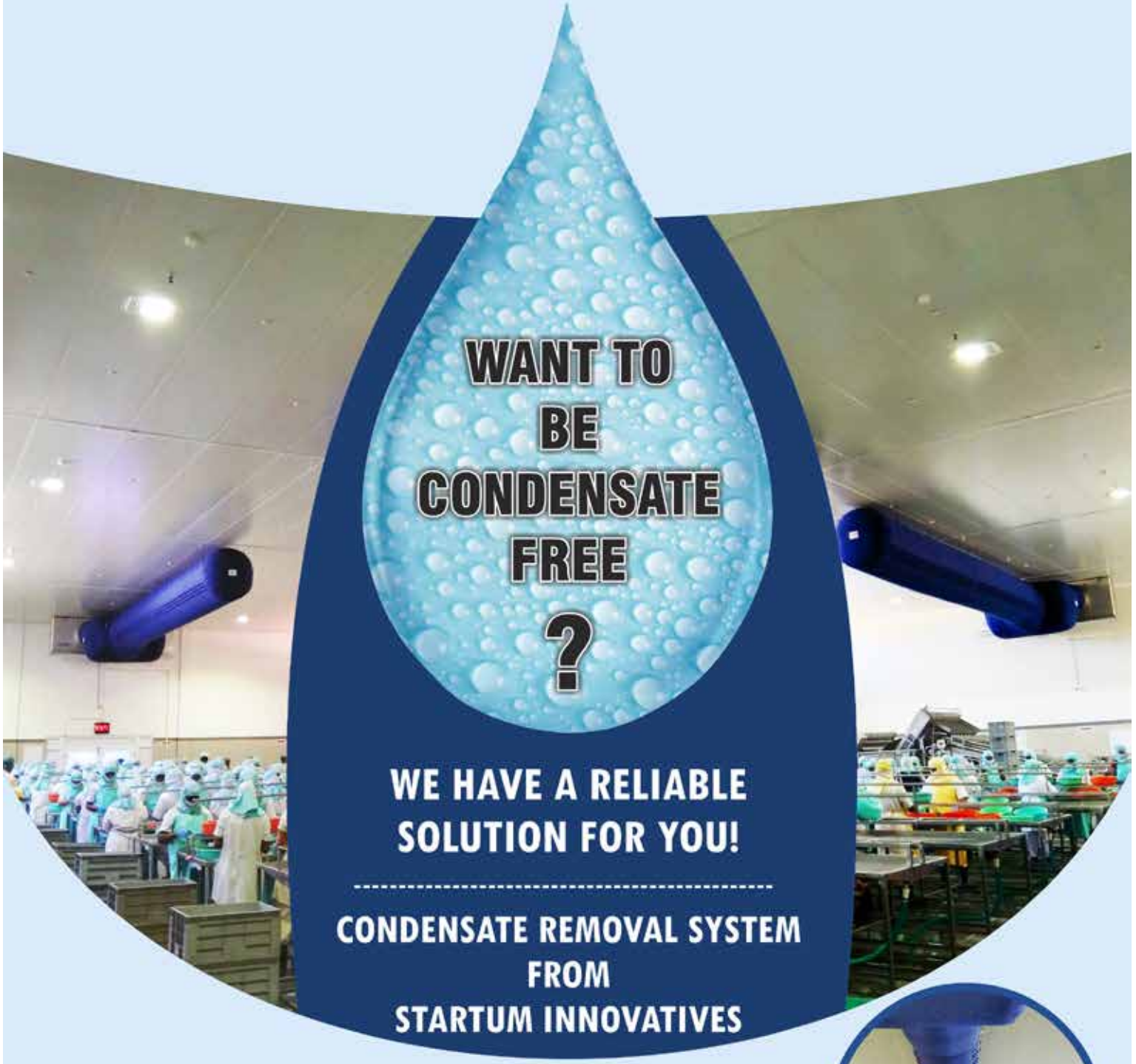

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23rd India International Seafood Show (IISS) 2023

Inaugural ceremony of the 23rd India International Seafood Show 2023

The 23rd edition of India International Seafood Show (IISS) was held in the port city of Kolkata, the capital of West Bengal, from February 15th-17th, 2023 with 'IISS, The World's Seafood Basket' as the focal theme of the event.

Organised by the Marine Products Export Development Authority (MPEDA), the nodal agency of Union Ministry of Commerce & Industry, and the Seafood Export Association of India (SEAI), the biennial showpiece event in the marine sector was the first in the post-pandemic phase.

The conclave, which was held in the West Bengal capital after a gap of 16 years, offered a vibrant and interactive platform to various industry stakeholders for inking business deals, forging new contacts, leveraging market linkages, and introducing new technologies and products to the global market. Significantly, it deliberated on a host of issues that would lead to the crystallization of an actionable roadmap for the growth trajectory of the country's seafood industry in the post-pandemic phase.

Also unique to this edition of the IISS was an international buyer-seller meet that was held for the first time, with emphasis on G20 countries.

Some major announcements and initiatives were also made at the event, which would go a long way in the country's efforts to meeting its ambitious target of seafood exports in the coming years.

Inaugurating the event at the sprawling Biswa Bangala Mela Prangan on February 15, Union Minister of State for Commerce and Industry Mrs. Anupriya Patel said India is aiming to double its income from seafood exports to US$ 14 billion by 2025 amid a sustained annual growth of three per cent in the sector. The country exported 1.36 million MT of seafood during

2021-22, earning an all-time record of 7.76 billion dollars. Noting that India is already among the world's top five seafood-exporting countries, she said 17 per cent of the country's agricultural exports comprise fish and allied products. "We are the world's third-largest fish producer, second-largest aquaculture producer and fourth-largest seafood exporter," she pointed out.

Referring to duty concessions on the import of vital shrimp/fish feed ingredients announced in the Union Budget 2023-24, the minister highlighted the government's measures for protecting the interest of the country's aqua farmers and the sector as a whole.

"We slashed the import duty from 15 per cent to 5 per cent for fish meal/krill meal and vitamin premixes, whereas the duty has been halved to 15 per cent for fish lipid oil and algal prime," she said, reiterating a "remarkable impact" on the earnings of aqua famers in terms of savings on the total cost.

Mrs. Patel also pointed out that the government has enhanced the RoDTEP (Remission of Duties and Taxes on Exported Products) rate and cap for frozen shrimp, which is the country's principal foreign exchange earner, to 3.1 per cent from 2.5 and Rs 42 from Rs 16, respectively.

Reiterating how the Pradhan Mantri Matsya Sampada Yojana (PMMSY) plays a vital role in bringing about the "Blue Revolution" through sustainable and responsible development of the fisheries sector in India, she said the 2020-introduced scheme, with an investment of Rs 20,050 crore, will increase the country's marine production capacity, productivity, intensification, diversification, productive utilization of area under cultivation and exports.

West Bengal Minister of Panchayat and Rural Development Mr. Pradip Mazumdar said the state produces 1.96 lakh metric tons of seafood when its annual requirement is 19.2 lakh MT. "We need to plug this gap," he said, urging the stakeholders in the sector to choose West Bengal as a favourite destination.

West Bengal Minister of State for Fisheries Mr. Biplab Roy Chowdhury hoped that a flurry of buyer-seller meets at the event would boost the marine seafood sector, much to the benefit of the country's eastern coast.

Mr. Rajesh Agrawal, Additional Secretary, Union Department of Commerce, said India should strive to double its contribution to 10 per cent of the world's marine seafood basket in a decade's time. "Such a vision can generate millions of jobs, raising the livelihood standards of the country's aqua farmers," he added.

SEAI National President Mr. Jagadish Fofandi urged the government to speed up India's moves for free trade agreements (FTAs) with countries of the European Union and the UK, besides strengthening commercial ties with "friendly" countries such as Russia and Saudi Arabia. Also, "minimal" control and regulations in procedures can add to Ease of Doing Business.

In his welcome address, MPEDA Chairman Mr. D.V. Swamy highlighted thecrucial roleof the states in the growth of India's seafood sector.

SEAI President (West Bengal region) Mr. Rajarshi Banerji proposed the Vote of thanks.

Welcome address by Mr. D. V. Swamy IAS, Chairman, MPEDA

Mrs. Anupriya Patel, Hon'ble Union Minister of State for Commerce and Industry delivers the inaugural address

Mr. Jagdish Fofandi, National President, Seafood Exporters Association of India felicitates the IISS 2023

Mr. Rajarshi Banerji, Regional President, Seafood Exporters Association of India, West Bengal proposes the vote of thanks

Mr. Rajesh Agrawal IAS, Additional Secretary, DoC, Government of India felicitates the IISS 2023

Audience in inaugural session of IISS 2023

Mr. Biplab Roy Chowdhury, Hon'ble Minister of State for Fisheries, Govt. of West Bengal felicitates the IISS 2023

Mr. Pradip Mazumdar, Hon'ble Minister of Panchayat and Rural Development, Govt. of West Bengal felicitates the IISS 2023

Exhibitors and their stalls:

The event had more than 330 stalls spread over 7,000 sqm, by more than 150 exhibitors, including 14 overseas, showcasing a wide range of innovative and eco-friendly products and equipment based on automated and IT-aided pre-processing, processing and storage technologies and energy-efficient systems for value addition. In addition, they provided an opening for service providers such as the logistics and certifying/ testing segments.

There were also exhibitors from countries such as Sweden, Vietnam, Spain, Belgium, Thailand, Germany etc. showcasing various products and services. The expo also featured aquaculture practices, value-added seafood products, high-end machines for food processing, food additives, enhancers and preservatives. More than 2,100 delegates, nearly 100 of them from 12 foreign countries, attended the event where deliberations were made on a host of current issues and challenges confronting the global marine products industry. The exhibition had over 25,000 footfalls.

GLIMPSE OF 23rd IISS

Inauguration of the exhibition hall

MARKETING NEWS

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Technical Sessions

Major topics during technical sessions, which were addressed by experts, included 'Leveraging FTAs for better market access'; 'Global Shrimp Trade - Status and market prospects'; 'Market Access issues – Status and way forward'; 'Innovating to Improve Competitiveness of Shrimp Farming'; Modernisation of fishing harbours in India – Status and future plans'; 'Next Generation Refrigeration in seafood cold chain'; 'Black Tiger Shrimp - Signs of revival with special reference to India'; Value addition through indigenous seafood'; and IoT-based technology for aquaculture farm management.

Deliberating on the topic 'Seafood Trade & Market Access', experts said India must tap more of its domestic market for shrimps through improved cold-chain infrastructure so as to absorb fluctuations in the International trade of the commodity owing to stiff competition from Latin America and South-East Asia.

India's industry, when it comes to country branding, must come together and follow the example of Ecuador which has achieved a meteoric post-pandemic rise in shrimp production due to a stronger market-share in USA. While domestic prices are better than international for many species of capture and culture fish, India's internal markets can absorb 30 per cent of the shrimps in the country, the experts said.

They also stressed the need for India to tap its "immense" scope for value-added marine products even as the country is showing positive signs of diversification that are guarding it against "too much" direct competition. India must tap more of its domestic market for shrimps through improved cold-chain infrastructure so as to absorb fluctuations in the international trade of the commodity owing to stiff competition from Latin America and South-East Asia.

Noting that India is able to comfortably market its non-shrimp items to all countries, SEAI Secretary-General Mr. Elias Sait said the total US market for shrimps is around 850,000 tons annually. "We supplied 375,000 (44 per cent) of these in 2021-22, which dropped by 20 per cent during the current financial year. This was mainly due to Ecuador increasing its shrimp production and supplies to the US at cheaper prices. India substituted this drop in the US market-share by increasing exports to China, EEC (European Economic Community) and other countries," he explained.

In his talk on the topic 'Leveraging FTAs for Better Market Access' Mr. Tapan Mazumder, Additional Director-General of Foreign Trade, said the government is renegotiating for an enhanced free trade agreement (FTA) with South Korea, where India exported 3,864 tons of seafood. "One round of the discussions got over, and the second is slated for next month," he revealed. Mr. Mazumder also highlighted the need for "simple and clear" Rules of Origin that determine a product's economic nationality.

Mr. Willem van der Pijl, Founder and Owner of Netherlands-based Shrimp Insights, said India and Bangladesh have seen a decline in their global seafood supplies, while Vietnam has a "slightly more" positive trend. One tactic to move forward was diversification of product and market, with stronger focus on EU market and domestic market development, he noted in the presentation, titled 'Global Shrimp Trade — Status and market prospects'.

Mr. George Chamberlain, Founder and Former President, Global Seafood Alliance, stressed the need for embracing innovation to improve the whole chain of breeding, hatching, nutrition, grow-out and processing.

Mr. Kuntal Sensarma, Economic Adviser, Ministry of Food Processing Industries, spoke on the initiatives and schemes of Ministry of Food Processing Industries, GoI, which are beneficial to the Seafood Sector in India.

The second day had sessions on Seafood sectoral & infrastructure development. Next generation refrigeration technology in seafood cold chain by Prof. Dr. M. S. Dasgupta of BITS Pilani. Mr. Ravikumar Yellanki narrated the ways by which global production and market for Black Tiger shrimp is being revived and the efforts for the same in India. The ways and means to increase value addition of indigenous and imported seafood and the demand for value added products was detailed by Mr. Kenny Thomas, Managing Director of M/s. Jinny Marine Traders, Veraval.

The session on regulatory measures in selected G – 20 nations had presentations by US FDA represented by Dr. K. Madhusudhan, Mr. Jake Lane and Mr. Osama Hamoud, Consumer Safety Officers, Mr. Tetsuya Kawashima, Director, Fishery Agency, Japan, Mrs. Ranjeet Klair, Director, Food

Safety, The Acheson Group, Canada, Dr. M. Balaji IAS, Joint Secretary & Directori/c, Export Inspection Council of India, and Mr. Mohammed Ibrahim Othaibi, Director General, Ministry of Environment, Water and Agriculture, Saudi Arabia.

Another interesting session was on the technologies showcased by stat up firms, who were chosen as finalists among the various proposals received.

Chitosan, a polysaccharide that comes from the outer skeleton of shellfish like crab, lobster, and shrimp, where experts noted that the global market was poised to reach $47.06 billion by 2030 from the current $10.88 billion, registering an annual growth rate of 12 per cent.

Sensing a "huge opportunity" awaiting the country in this field, LongShore Technologies founder Amey Naik pointed out that India is a major player in the market of chitosan, and the top competitors are the USA, Canada, Japan, France, China, Germany and Vietnam.

India's production of chitosan is localised, with its main application in agriculture, pharma, waste water treatment, cosmetics, animal and aquafeed sectors, he revealed, speaking on 'Startup Initiatives in Product Diversification/Path breaking Technology for Seafood Industry'

"Chitosan can also be used for making end-use products such as plant growth booster, which is a solution with chitosan and some organic acids, for increasing overall yield of vegetative crops," he noted.

The session by Dr. Subhashini, Director of M/s. Aristogene Biosciences Pvt. Ltd., Bangalore has showcased use of bacteriophages as a natural alternative to control pathogenic Vibrios in aquaculture.

Mr. Pavan Krishna Kosaraju of M/s. Aqua Exchange Agritech Pvt. Ltd., Visakhapatnam presented IoT based technology for aquaculture farm management to follow GAPs. Sustainable measures to the growth of Indian fish meal industry was presented by Mr. Mohammed Dawood Sait, President of Indian Marine Ingredients Association.

A GLIMPSE OF TECHNICAL SESSION

Mr. Elias Sait, Secretary General, SEAI

Mr. Kenny Thomas, Managing Director, Jinny Marine Traders

Mr. Willem van der Pijil, Founder and Owner, Shrimp Insights

Dr. George Chamberlain, Seafood Alliance President and Executive Director, The Centre for Responsible Seafood

Mr. Kuntal Sensarma, Economic Adviser, Ministry of Food Processing Industries

Mr. Ravikumar Yellanki, President, All India Shrimp Hatcheries Association

Mr. Abraham J. Tharakan, Managing Director, Accelerated Freeze Drying Company Ltd.

Dr. C. R. Subhashini, Director, Aqua Exchange Agritech Pvt. Ltd., Vishakhapatnam

Mr. Pavan Krishna Kosaraju, CEO, Aqua Exchange Agritech Pvt. Ltd., Vishakhapatnam

Mr. Mohammed Dawood Sait, President, Indian Marine Ingredients Association (IMIA)

Mr. Amey Naik, Founder, Longshore Technologies, Gandhinagar

Mr. Aditya Dash, Managing Director, Suryo Group of Companies

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Dr. M. S. Dasgupta, Professor, Birla Institute of Technology And Science (BITS) Pilani

Dr. Kunapuli Madhusudhan, Mr. Jake Lane & Mr. Osama Hamoud , Consumer Safety Officers, FDA India Office, New Delhi

Mr. Tetsuya Kawashima, Director, Fisheries Agency, Govt. of Japan

Ms. Ranjeet Klair, Director, Food Safety, The Acheson Group, Canada

Mr. Mohammed Ibrahim Othaibi, Director General, Ministry of Environment, Water and Agriculture, Kingdom of Saudi Arabia

Dr. M. Balaji, Joint Secretary, Department of Commerce, MoC&I, GoI

International Buyer-Seller Meet

The International Buyer Seller Meet (IBSM), organized on the side lines of the conclave, witnessed the participation of 28 buyers, represented by 21 companies from 11 countries. More than 370 productive business meetings took place at the IBSM, benefitting 82 Indian exporters.

MPEDA Chairman Mr. D. V. Swamy said the IBSM was a hugely successful programme done along with the 23rd edition of IISS. “All the buyers and exporters, who participated in the buyer-seller meet, appreciated MPEDA’s efforts for a smooth and fruitful conduct of the programme,” he added.

Overall, the IISS 2023 hosted more than 370 productive business meets. As many as 82 Indian exporters benefited from the meets while the event recorded presence of more than 7,500 business visitors from within the country.

“Both buyers and exporters keenly participated in IISS 2023. There was widespread appreciation over our efforts to revive the country’s marine exports in the post-pandemic era,” Mr. Swamy said.

MARKETING NEWS

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Exhibitor Awards

Awards were presented to three categories of stalls.

Vietnamese firm Anh Phat won the prize for the best overseas stall, while Spain's Palinox was declared the second-best in the category.

Among the domestic, Wan Hai Lines won the best stall, followed by Grasim Industries.
In the category of exporters, the top honour went to KNC Agro, while SA Exports came second.

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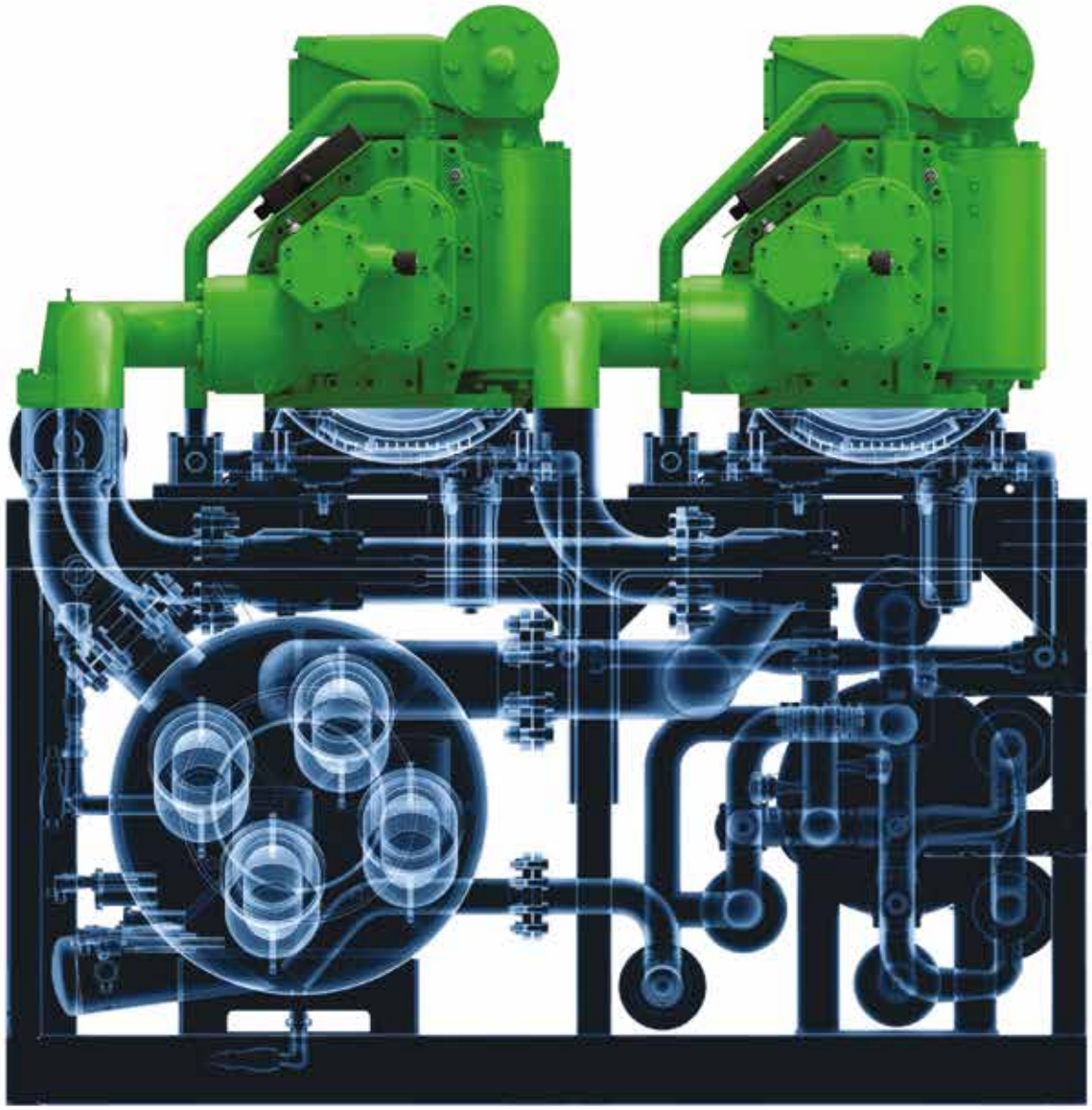

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Office No – 604 & 605, 6th Floor, B – Wing, Powai Plaza Building,
Hiranandani Garden, Powai, Mumbai – 400076. India
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Exposure visit of Lakshadweep fishers to Kolkata

Team members at IISS - 2023 venue

MPEDA - NETFISH has sponsored and facilitated for an exposure visit of fishers from Lakshadweep to Kolkata, West Bengal to participate in the India International Seafood Show (IISS) 2023 at Biswa Bengala Mela Prangan, Kolkata during 15th to 17th February 2023, to visit a seafood factory and also to interact with Japanese buyers on the need of hygiene and sanitation while tuna fishing. The team of 19 participants including two officials in which one from Department of Fisheries, Lakshadweep and other from MPEDA office at Kavaratti had participated in the visit. The fishers consisted of boat owners, fishermen & fish collection entrepreneurs from Kavaratti and Agatti Islands were selected for the visit.

On 15th February 2023, after completing the registration formalities, the team attended the inaugural function of IISS 2023. After the inaugural function the team visited the stalls of various exporters and importers of Indian marine products and had interacted with the processors, machinery manufacturers, technical experts etc. The team could understand the need of setting up of processing plants, machinery etc. in the seafood cold chain.

Naser (Agatti Fisherman Society President) and Jabbar. B (Fisheries Official) at inaugural venue

On 16th February 2023 the team visited M/s. Shankha Deep Exports Pvt. Ltd., a shrimp processing unit in Kolkata. The Managing Director of the company explained the functions of the plant in detail to the team.

The team could understand how extend the quality of the fish is being taken care of in the processing factory while preparing for export. The factory officials explained the need of hygienic handling of fish right from sea to factory so that best quality products can be exported.





Interaction with exporters from Mumbai, Kerala, Karnataka & West Bengal at IISS 2023

On 17th February 2023, the team met Mr. D. V. Swamy IAS, Chairman, and Dr. M. Karthikeyan, Director of MPEDA.

Chairman offered all necessary assistance for the fisheries development of Lakshadweep islands.

The team had an interaction with Nishino San, a Japanese trader. Mr. Anil Kumar P, Joint Director (Marketing), MPEDA led the interactive session with the Japanese agent. Dr. P. Jayagopal, Deputy Director, Mr. A. Saktivel, Assistant Director also participated during the meeting.

In the processing unit

Lakshadweep team with the Chairman of MPEDA and the Director of MPEDA

Lakshadweep team meets Japanese trader, Nishiano San

The team retuned on 18th February 2023.The team could understand the way the fish is being handled in the processing factories, the need of hygiene handling and overall hygiene and sanitation to be inculcated to produce better quality fish products.

The exposure visit also helped to interact with buyers and other processors fromJapan, which would pave the way for starting tuna export from islands in near future. The team thanked to the efforts being taken by MPEDA-NETFISH to make this exposure visit a grand success.

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Monthly outlook forecast report

Ritesh Victor: Co-Founder & Country Head, Myforexeye Fintech Pvt. Ltd
Email-id: sales@myforexeye.com

USDINR

USDINR was seen following a downward trajectory in the very first month of 2023. It entered the month opening at 82.66 and on the second day itself it went to hit the monthly high of 82.94 after which we saw USDINR on the downward trend. In the second week, we saw the biggest correction in the rupee of the January month as it opened at 82.30 and ended the week at 81.325 i.e. the rupee appreciated almost by 1 rupee. The RBI intervened in the market twice this month, first intervention was seen on 16th Jan when the USDINR opened at 81.24 and the second intervention was observed on 23rd Jan when USDINR opened at 80.94.

Public sector banks were asked to buy dollars on behalf of RBI in order to maintain its FX reserves which largely depreciated in the previous year in order to protect the currency from breaching the 83 level. Similarly, the dollar index also experienced its weakening phase during the January month entering the month at 103.50 levels and ending low at 101.91. In the next month some of the upcoming events are Interest Rate decision, WPI Inflation (YoY) (Jan), Nikkei Services PMI (Jan).

The Indian Rupee recovered in the first month of the year 2023, in line with a declining dollar index and recovering Asian currencies. Even though the extent of recovery is quite different compared to other Asian currencies, relentless pressure on the rupee has certainly subsided.

A first glance at the daily candlestick chart indicates USDINR trading between two simple moving averages (SMA): 89-day (grey line) and 144-day (green line). This establishes a broad short-term trading range between 81 and 82.25. Neckline of the double top formation made in Oct-Dec22, highlighted by the red dashed line comes at 80.51. There is an unfilled price gap at 79.99 – 80.28 formed on 21-22 Sep22, underscored by blue horizontal lines. Do recall that last year, when USDINR was continuously rising, it had resisted around the 80 mark for quite some time – observe the period of Jul to Sep. This indicates that 80-81 region will be a good

medium-term support. The three standard momentum indicators, MACD, RSI and Slow Stochastics have turned neutral.

Looks like the range of 81 – 82.25 is going to hold for a while. Play this range for hedging for short term exposures. Exporters and importers should certainly consider an optimum blend of simple forwards and vanilla options. Markets are getting increasingly volatile and uncertain, and it makes sense to buy insurance (vanilla options) in addition to obligatory forward contracts.

EURUSD

The EURUSD pair experienced a sharp decline in the first week of 2023, trading at around 1.0644. After surging for three consecutive months, EURUSD started a correction phase. The moderate improvement in economic sentiment in the Eurozone and the slowing of interest rate increases by the US central bank, which has diminished the appeal of the greenback as a safe haven. The consumer price index for the Eurozone decreased by 0.4% month over month, mirroring the decline from December. Economic experts had predicted a 0.3% drop.

The annual rate of inflation decreased to 8.5% from 9.2% the previous month and fell short of economists' expectations of 9.0%. Relating to the euro area, recession worries now seem to have subsided, but they continue to be a key factor supporting the single currency's recovery and the ECB's hawkish stance. In this month as the rally for the Euro appreciation continuous investors will keep a close watch on few of the important economic events, ECB interest rate decision followed by the ECB Marginal facility rate and Deposit facility rate. In the end of the month ZEW Economic sentiments will show the stability of the Business environment in the Eurozone.

The major currency pair bounced off the 21-day Exponential Moving Average the previous day but stays inside a three-month-old rising wedge bearish chart pattern as traders awaits the Federal Open Market Committee monetary policy meeting results. It's worth noting that the RSI (14) pullback from overbought territory joins the bearish MACD signals to challenge the EUR/USD bulls.

Also acting as an upside hurdle is the pair's multiple failures to cross the 1.0930. Even if the quote rises past 1.0930, the stated wedge's top line surrounding 1.0965 could challenge the EUR/USD bulls before directing them to cross the 1.1000 psychological magnet. On the flip side, the 21-day EMA level of 1.0800 restricts immediate EUR/USD moves ahead of highlighting the stated wedge's lower line, close to 1.0775 at the latest. The EUR/USD bears manage to conquer the 1.0775 key support, the odds of witnessing a slump toward the late 2022 lows can't be ruled out. However, the 200-day EMA level near 1.0500 may act as an intermediate halt during the likely slump.

GBPUSD

Sterling remained on the front foot since the start of Jan month and registered a gain of 1.8% amid Inflation

data released 10.5% in the mid of month indicated BoE might have to raise interest rate more aggressively and persistent weakness in the dollar index also aided the pair. Though Fed Chair Jerome Powell statement was hawkish in FOMC but market is assuming Fed will cut the interest rate as soon as this year which led dollar index to hit 9 months low of 100.81. Looking at the continuous downfall in dollar this uptrend for the pair might continue.

This is an important month for the pair on the event side as major central banks going to hike interest rates in the start of the month itself along with Services and Composite PMI from UK side going ahead most critical US and UK inflation numbers are due in the mid of month along with US core retail sales while end of the month doesn't have any important event to be released.

Bulls were on charge since the start of month and pair gained more than 200 pips during the month. Sterling clinched the fresh seven month high of 1.2447 in the previous month versus US dollar but couldn't sustain at higher levels and again corrected from the critical resistance of 1.2450.

It seems pair gathering strength to break above the resistance and to take a move towards June 2022 high of 1.2599 failed to break critical resistance of 1.2450 might led pair towards 1.2178 as 50 days moving average is there. On the daily time frame momentum indicator MACD giving mixed signals while RSI hovering around 55 which is considered to be an overbought zone.

USDJPY

Beginning at 131.101, the month of January rose to a high of 134.778 before tumbling to 130.098. The US dollar's movement against the Japanese yen was volatile, but it mainly settled in the middle of the range. The market appeared to be trying to carve out a range between 130 on the bottom and 135 on the top, and there appeared to be a lot of frenzied trade, but the US dollar fell against the Japanese Yen after initially attempting to move higher.

It was crucial to take note of the 127.00 region because it seemed to be a significant cluster. It is significant to note that the Bank of Japan has decided to continue controlling the yield curve.

Since the Bank of Japan has been printing unlimited amounts of yen to keep the yield on its 10-year note at a 50-basis point level, the market has been reacting to this fact. The market is therefore oversupplied with Japanese Yen, although the yield curve regulation was just raised from 25 to 50 basis points. The US dollar dropped below the 130 level.

The 130 level is a big, round, psychologically significant figure that people will want to pay particular attention to, therefore the traders must interpret this as a scenario in which the market is striving to build some sort of base. Participants in the market must be very nimble and recognize that this is a turbulent, range-bound type of short-term market.

The USDJPY opened at 131.101; started the month with a surge and reached the higher at 134.778 level during the month. The pair closed at 130.098 (-0.77%) level compared to the previous January's close. If the pair rises, it might reach the 50-day Moving Average of 132.90. If the pair falls, the support level of 127.22 must remain unchanged. If the pair recovers, the resistance level should be 132.875. The MACD line has moved parallel but now appears to be convergent with the signal line. It could cross the signal line to move below it, causing a new divergence.

The pair finished the month at a lower level than it did at the end of January, but price behavior continued to trade sideways. The Relative Strength Index continued to rise during the month, but it crossed and fell below its 14-day RSI's simple moving average at the conclusion of the month, indicating that the pair is still weak.

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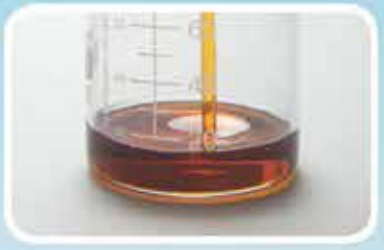
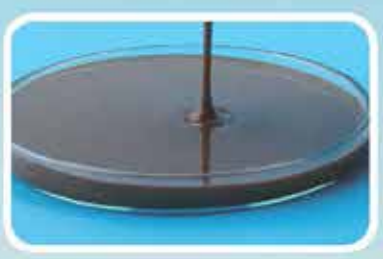

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Propelling Indian marine products exports: Technologies and the way ahead

George Ninan & Suresh A.
ICAR -Central Institute of Fisheries Technology, Cochin -29
director.cift@icar.gov.in

Fish products export from India: Status and growth trends

The fish trade is a significant source of foreign exchange for India. During 2021–2022, India exported 1.4 Mt of seafood worth a record-breaking 7.8 billion US$. Between 1995 and 2020, there was a remarkable increase in the export of fish and fish products from India, at a rate of over 9% annually. Some analyses have shown that India holds a comparative advantage in exporting fish and fish products.

India primarily exports frozen shrimp, frozen fish, frozen squid, dried products, frozen cuttlefish, chilled products, and live products. Frozen shrimp, which surpassed the total fish export in the mid-90s, accounted for more than half of all marine products exported from India in 2019–20, both in terms of value (4.9 million US$) and volume (0. 65 MT). Between 1995 and 2019, the value and volume of shrimp exports and total fish exports rose dramatically. Of late, it has contributed approximately 10% of total exports and more than 5.2% of the country's agricultural GVA, earning it the title of "sunrise" sector.

Frozen shrimp was the main export item, accounting for 53% of the total marine products exported in terms of quantity and about 75% of the total export value (in US dollars). The United States, China, the European Union, South East Asia, Japan, and the Middle East are the top importers of Indian marine products. Among them are the two biggest importers, the USA and China. The USA is the leading importer of Indian seafood in both value and volume in 2021–22, with an import of US$ 3,371.66 million and a share of 37.56% in terms of dollar value. Exports to the USA have increased in terms of volume by 27.63%, rupee revenue by 36.76% and dollar revenue by 37.56%. Frozen shrimp was the main exported commodity to the USA. China moved up to the second-largest seafood export market from India in terms of volume with an import of 2,66,989 MT worth US$ 1,175.05 million, or 19.50% in terms of quantity and 15.14% in terms of dollars. Exports to China climbed in volume by 22.28%, dollar value by 25.12% and rupee value by 31.09%. However, the market share of India is changing due to various factors, including changes in resources, costs, income, consumption patterns, and policies. In the growth process, India lost significant market share in some of the traditional importing countries.

Demand and competition

Competition determined by comparative advantage is the most important factor that influences the market shares of Indian fish exports. The social and economic landscape consumers are changing quickly, characterized by changes in per capital income, urbanization and preferences of the consumers. The positioning of fish as a healthy food has changed the perception, and has affected an increase in the demand for fish globally. Various bilateral and multilateral trade agreements, sanitary and phytosanitary regulations, and trade promotion have resulted in the expansion of the global fish trade.

The development of the food-processing industry has aided the expansion of trade in processed fish. This is true for India as well. Two of the most significant developments in recent decades are the technological advancements in fish production, processing, and quality assurance and the emphasis on fish trade promotion supported by policies. The research

institutions under the ICAR system and the universities and colleges under its ambit and outside have served as the major sources of the technological advancements. It was supported with favorable policies as well. The Foreign Trade Policy's "Merchandise Exports from India Scheme" (MEIS), which came into effect on April 1st, 2015, has expanded incentives for exporting seafood.

Processing, value addition and export

Marine exports have a potential market in value-added products such as cooked, ready to eat, and ready to cook marine products, such as freeze-dried shrimp, surimi, pickled fish, canned fish, etc. Value addition has the scope for increasing revenue and holds the potential to realise higher unit values, boosting India's competitive advantage. This depends largely on the development infrastructure along the entire value chain.

However, in practice, the pre-processing stage has much poorer infrastructure development compared to the processing and post-processing stages. This is an issue that should be addressed at the decentralised level. Increasing market and product diversification is critical to enhancing unit value and reducing the risk of market fluctuations. Value-added items such as frozen, peeled, and deveined shrimp, as well as prepared goods, are being produced in greater quantities by a significant number of exporting countries. Therefore, cost reductions turn out to be significant. Therefore, popularising inexpensive technology for value addition, connecting buyers and sellers to encourage market diversification and receiving technical assistance from various research institutes in the fisheries sector play crucial roles in the development of the industry. Due to the restricted supply of shrimp, the upgraded plants, which have more capacity, are often working at less capacity, as most of the shrimp produced in the country is exported as frozen raw shrimp with primary processing for reprocessing in the importing country. If value addition and processing are carried out in the country itself, it could increase the country's export income, job availability, and economic activities.

Despite the fact that India has a plethora of opportunities in processing facilities, the country lags behind in shrimp processing and value addition for a variety of reasons, including a lack of skilled labour, inadequate cold storage facilities, inefficient transportation facilities, an inadequate supply of fish for processing, the requirement of having more stringent food safety and quality standard norms throughout the supply chain, and so on.

Cross learning

China has the largest seafood reprocessing industry in the world, processing both domestically produced fish and reprocessing imported fish into an array of value-added products. Large quantities of domestically produced cephalopods, shrimp, tilapia, and bivalve molluscs, as well as processed whitefish, including Alaska pollock and cod, are included in its exports. The imported fish and shrimp meet the supply-demand gap in the processing industries. Cost reduction is affected by technologically advanced processing facilities meeting global food safety and quality standards and exporters' HACCP requirements. Aquatic processed products made from imported raw materials make up a portion of Chinese exports, as previously mentioned. Several other Asian nations have also progressed well in reprocessing and exports. The capacity utilization of processing industries is quite low in India.

India could adopt the strategies in fish reprocessing, which would boost the country's economic activities. India needs to comprehensively review its policies on imports, reprocessing, and exports. Another area for cross-learning is the institutional mechanisms for promoting high-intensity production of exportable-quality fish by using advanced technologies while keeping the ecosystem healthy.

Food safety regulation, traceability and opportunities

Adoption of stringent quality regulations has potential for boosting India's exports, even though it incurs a high cost of compliance in the initial stages. The

strengthening of food quality and safety in India was one key element that propelled Indian sea food exports in the past, along with changing global preferences. Further, new challenges in terms of safety risks of microbial and chemical origins are emerging. The COVID-19 has opened up a plethora of issues in food safety management.

The USA, EU, and Japan have stringent SPS regulations. The Indian food business demands an adequate system due to the precariousness of the current supply chain and to lessen the numerous instances of fraud and food safety accidents, which makes effective traceability essential. An effective food traceability system is not only important for managing food quality and safety risks; it also promotes the development of an effective value chain management system for the aquaculture and fishery sectors. Though India has made significant progress in ensuring food safety and quality for export markets, the system is less stringent for domestic markets, calling for regulations for food safety in domestic markets as well.

The traceability of fish and fishery products along the value chain lags behind in India. Seafood traceability is the ability to track a product from the point of sale to its source. It can be achieved through rigorous documentation, record-keeping, and suitable handling procedures during processing, shipping, and receiving.

To follow the production process, a variety of traceability methods are used in the Indian food processing industry, such as RFID, holograms, barcodes, nuclear methods, and other tracking media. Apart from this, APEDA had implemented a traceability system for some products (Meat.net, Anar.net, Peanut.net, and Grape.net) to monitor the production process throughout the supply chain of meat, pomegranate, peanut, and grapes, respectively. Learning lessons from such experiments can be inculcated in the fisheries sector too.

Green initiatives

The value chain in fisheries has to adopt efforts to reduce carbon foot prints and reduce waste so as to attain sustainable production and consumption, in tune with Sustainable Development Goal 14 and Goal 12. Efforts are needed to strengthen the scientific and technological capacity to move towards more sustainable patterns of consumption and production.In the fisheries value chain, the initiatives include efforts to design fuel efficient fishing vessels, vessels mainly based on alternative fuel sources than fossil fuel, solar boats, newer designs of otters boards (double slotted otter board that could reduce the drag), low drag trawls made up of ultra-high molecular weight poly ethylene, bycatch reducing devices, stainless steel sinkers instead of led based sinkers etc are some initiatives by ICAR- CIFT in this direction in the realms of crafts and gear. Further, there are efforts to reduce energy usage in refrigeration by utilising carbon dioxide based cooling systems that could reduce carbon footprints. Energy efficient fish dryers are getting popularised among processors.

Concluding remarks

The export of marine products holds greater prospects for earning foreign exchange in times to come, mainly due to the high demand for aquatic foods across the globe due to several factors, including growth in per capita income, urbanization, and changes in the taste and preference of consumers. As a first step, India needs to augment exportable surpluses.

For this, fish production is to be increased to better utilise the available water resources. India has 8118 km of coastline, a 2.02 million square metre Exclusive Economic Zone (EEZ), and a 0.53 square metre continental shelf. The inland resources consist of 0.27 million km of rivers and canals, 2.5 million hectares of ponds, 3.2 million hectares of tanks, and 1.2 million hectares of floodplain lakes. During 2020–21, 66% of marine and 51% of inland potential were utilized. For the past ten years, India's entire marine production has been steadily increasing, from 8.6 Mt (2011) to 14.7 Mt (2021).

During 2020–21, the overall fish production of India reached 14.7 Mt (million tons), 11.3 mt by inland sector and 3.5 mt by marine sector. Approximately 1.2 percent of the nation's Gross Value Added (GVA) and more than 7.3 percent of the agricultural GVA are contributed by the sector. In India, the sector supports around 28 million people's livelihoods in terms of employment, particularly the vulnerable and underprivileged populations (GOI, 2022). Andhra Pradesh is the top total fish producer (42 lakh tons) followed by West Bengal, Gujarat, Odisha, Tamil Nadu, Uttar Pradesh, and Kerala.

In order to ensure the participation of small-scale fishermen, the potential of collectives like producer companies' needs to be promoted. The ICAR institutions have developed technologies for augmenting fish production. Extension systems are to be promoted and strengthened to popularise the technologies and undertake sustainable production practices. To increase the unit value realisation, the export industry has to undertake value addition, catering to the preferences of the importers. ICAR-Central Institute of Fisheries Technology, Cochin, has been developing and popularising advanced technologies of fish processing value addition. The exports need to comply with sanitary and phytosanitary regulations. The Indian Sea Food Industry has largely been in line with quality guidelines like HACCP, a consequence of which is that the rejections have come down over a period of time in proportion to exports.

CIFT has been an integral part of efforts to strengthen the quality assurance system as part of the expert panel of the EIC, approving sea food export firms, implementing the quality assurance system in industries by providing technical consultancies, developing human resources in these areas through training, providing laboratory services, and assisting FSSAI in developing domestic standards. These efforts will continue with increased spirit in the future, too.

Our efforts need to be targeted towards embracing green fishing and associated value chain. India has progressed significantly in that direction by developing technologies and popularisation of them.

CIFT has been undertaking continued research towards development of green technologies for the entire fishery value chain including exports. The technological efforts are further supported by enabling policies in the spheres of sustainable fishery management in tune with CCRF. Most of the states have already passed respective MFRAs. Several states have taken steps to streamline the already paltry fishery subsidy to green fishing initiatives.

The efforts have to be gender sensitive and recognise the role of women in the fisheries value chain. These steps could help India's efforts to boost exports while helping to attain the sustainable development goals (SDGs).

The new spirit of entrepreneurship development being promoted by the government is to be fully leveraged for augmenting exports. The research efforts, developmental efforts, enabling policy framework coupled with the enthusiasm of exporters could drive Indian marine products exports to newer heights in the years to come.

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Perspectives and future vision for augmenting seafood export from India

A. Gopalakrishnan and Ratheesh Kumar R.
ICAR-Central Marine Fisheries Research Institute (CMFRI), Ernakulam North P.O., Kochi – 682018, Kerala, India

India is bestowed with a long coastline of 8129 km, 0.5 million sq.km of continental shelf, 2.02 million sq.km of EEZ, and a catchable annual marine fishery potential of 4.41 million tons. India is the second largest fish-producing country in the world accounting for 7.56 percent of global production and 4th largest fish exporter. In 2021-22, India's total marine fish production stood at 3.05 million tons.

With the implementation of the New Economic Policy in July 1991 and the subsequent focus on terms of trade and gains from trade, seafood was identified as a major source of foreign exchange earner for the country. There has been a commendable increase in Indian fisheries export in terms of quantity, value, and unit value over the years. The country's fish export value has increased from INR 7,245 crore to INR 43,717 crore in the last 15 years, with a CAGR (Compound annual growth rate) of 12.73%.From 2020-21 to 2021-22 capture fisheries contribution to marine product export reduced from 56.03% to 53.56% in terms of quantity and reduced from 36.42% to 32.02% in terms of US$ value[1].

India is among the top 5 fish exporting countries in the world. About 17% of India's agricultural exports are fish and fish products[2]. During the financial year 2020-21, India exported 11, 49,510 MT of Seafood worth US$ 5.96 Billion[1]. The USA retained the title as the major importer of Indian seafood, followed by China and the European Union. Frozen shrimp continued to be the major item of export in terms of quantity and value, followed by frozen fish.

The Government of India (GoI) aims to increase fisheries exports to 1 trillion Indian rupees by the financial year 2025 by supporting the infrastructure development of fishing harbours and fish landing centres under its schemes. In association with the private sector the future focus should be on developing export-oriented supply chain models with an emphasis on organized procurement, processing, certification, packaging, and branding[3].

Research priorities for augmenting seafood

Given the sustained increase in demand for seafood in the domestic and export markets, while the fishing pressure in coastal waters is beyond optimal levels, there is a need to utilize the unexplored potential of offshore and deep-sea waters. Past studies conducted by ICAR-CMFRI have indicated the availability of several offshore and deep-sea resources which have high potential in the export market, if harvested in a viable and sustainable manner. ICAR-CMFRI is continuing research in this area with the objective of regular assessments of the stock status of these resources and to develop strategies and options for optimally harnessing the potential.

- Over the past two decades, there has been significant developments in the realm of mariculture, which involves the culture of marine species in enclosed structures in both in-shore and offshore waters. ICAR-CMFRI has been a frontrunner in the country's mariculture research, with significant milestones achieved during this period. ICAR-CMFRI has established hatchery and grow-out infrastructure for seed production and has achieved broodstock development, maturation, sex reversal, spawning, fertilization and hatching of potential marine fin fish species such as cobia, pompano, groupers, snappers and sea breams, at several locations in the east and west coasts. Research trials in this direction are progressing in the marine fish hatcheries at Mandapam, Vishakhapatnam, Vizhinjam, Karwar and

Tuticorin research centres of CMFRI. The institute has also made a breakthrough in the seed production and larval rearing of the sea cucumber *Holothuria scabra* and *H. spinifera,* items of high export demand[4].

Apart from this, CMFRI has prioritized 76 fin fish and shell fish species that could be targeted for future expansion of mariculture production in the country, with potential prospects for enhancement of seafood export. A variety of grow-out farming technologies such as coastal and marine cage culture of finfish and shellfish, raft and longline culture of bivalves and seaweeds, integrated multi - trophic aquaculture (IMTA), re-circulatory aquaculture system (RAS) etc., have been standardized for Indian waters.

Seaweed farming is another prospective area wherein new research developments in culture technologies, and post-harvest product development can bring about a significant leap in domestic production and export of seaweed products. Breeding, seed production, and grow-out technologies for 23 high-value marine ornamental fishes with high export value is another emerging area. The institute is also promoting advanced co-research areas (biotechnology, genetic engineering, physiology, pathology, nutrition, and endocrinology) of critical importance that can contribute to sustain future marine fish production.

- Lately, the export processing units in India are facing the problem of under-utilizing installed capacity due to shortages of raw materials. This has been linked to resource depletion due to overfishing and climate change-induced impacts. ICAR-CMFRI has been undertaking focused research to address resource depletion by managing fishing efforts. Recent stock assessment studies of 68 commercially important marine fish species indicated that 86% of these are sustainably exploited. The State Fishery Management Plans developed by ICAR-CMFRI incorporate several strategies and management options specific to each maritime state towards ensuring optimal exploitation of marine resources. This includes management plans to regulate growth and recruitment overfishing using non-selective fishing gears besides out-based controls.

The institute has been instrumental in the notification of minimum legal size (MLS) for 58 commercially important fish species in Kerala (2015) and 19 species

in Karnataka (2019) to check juvenile fishing. The CMFRI will focus greater attention on this important aspect in its research and extension activities, and strongly take up this issue with the state governments, the fishing industry and the community to implement the prescribed management measures more effective.[4] ICAR-CMFRI's Life Cycle Assessment (LCA) of Indian marine fisheries revealed that carbon and carbon dioxide emission/kg fish values were 17.5% lower than the global average, indicating that our marine fisheries are more environment friendly.

- Fishery interaction with marine mega fauna is a great cause of concern as export demand induces the application of fishing pressure over the marine ecosystem. In accordance with the import provisions stipulated by exporting nations especially by USA, CMFRI completed a project titled "Assessment of Marine Mammals stock and bycatch of Marine Mammals and Sea turtle" funded by MPEDA.

As part of the project CMFRI conducted Marine mammals stock assessment in the Indian EEZ by undertaking extensive surveys in the sea and applying standard methodologies, bycatch estimation of marine mammals and sea turtles in the fishery by collecting data on incidental capture in fishing gear and beach-cast samples; and identifying conservatory measures to protect the marine mammals and sea turtles; and to reduce incidental mortality and serious injury of each stock below the bycatch limit[5].

Way forward

Given the increasing demand for seafood exports from India, the existing production basket needs to be diversified, including harnessing unexplored potential in offshore and deep-sea areas in the Indian EEZ and high seas. Further, to supplement the marine fish supply for exports, promising species that have high export potential can be farmed in open sea enclosures, after due assessments for their economic viability and profitability. Already remarkable progress has been made by ICAR-CMFRI in breeding of marine finfish, shellfish and ornamentals.

Further work will have to address the breeding, seed production and grow out of high value fishes such as pomfrets, seer fishes, tunas etc. that have high demand in the international seafood market. For large-scale open sea cage farming to be successful, further research is needed for identifying and mapping potential mariculture sites, stocking, feeding and nutrition, management and husbandry, precision farming techniques and other advanced technological options. Another important pre-requisite is developing the export policy framework with the value chain interventions/ strategies for efficient and sustainable seafood marketing in alignment with Sustainable Development Goals (SDGs).The possibility of bringing Free Trade Agreements (FTA) with more countries can be considered. Certification of fishery and fish products may be more challenging for smaller enterprises in developing countries like India, especially given the relatively high costs associated with certification. Indigenous certification arrangements may be explored to address this gap.

Efforts for intensifying export-oriented fishery may be consistent with global and domestic ecosystem sustainability mandates, particularly in the context of stringent conditions set by major importers of Indian seafood. Priority areas in this regard include catch reporting and traceability of fish consignments, strict monitoring of fishery interaction with marine mega fauna and fishery induced by-catch reduction, particularly that of ETP species. Therefore, future marine fisheries and mariculture needs to usher in renewed emphasis on Ecosystem based responsible fisheries management and conservation.

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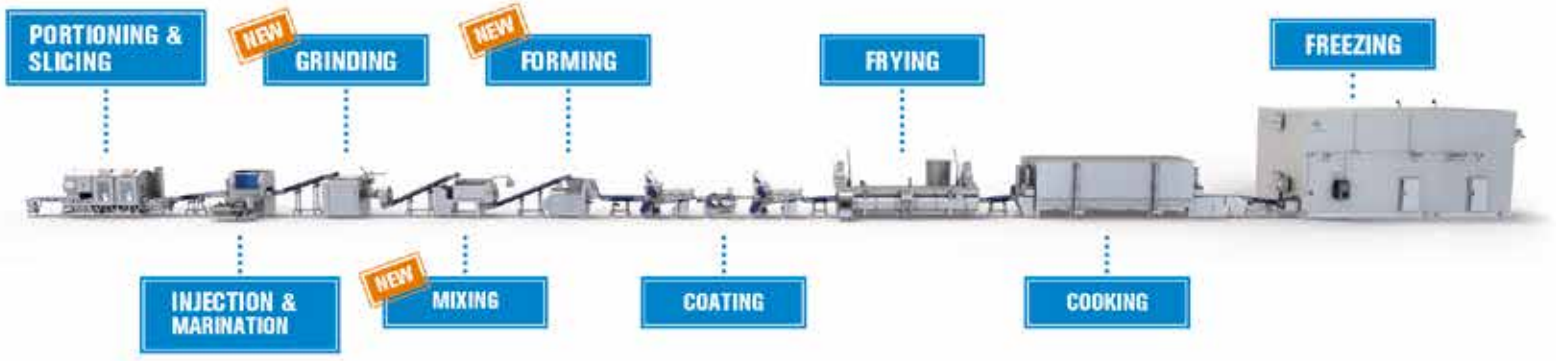

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Marine landing report January 2023

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

Real-time data on marine landings is collected by NETFISH on a daily basis from around 100 fishing harbours/landing centres of India, facilitating traceability and catch certification.

Details of fishing vessels arriving at the landing sites and the species-wise catch quantity landed by these vessels, are recorded and uploaded into the MPEDA website on a day to day basis by the Harbour Data Collectors. This report gives a summary on the species-wise, harbour-wise and state-wise trends in marine landings during January 2023.

I.Observation on fish catch landings

Marine catch landing data was obtained from 91 landing sites and the total catch recorded was 79,017.60 tons.

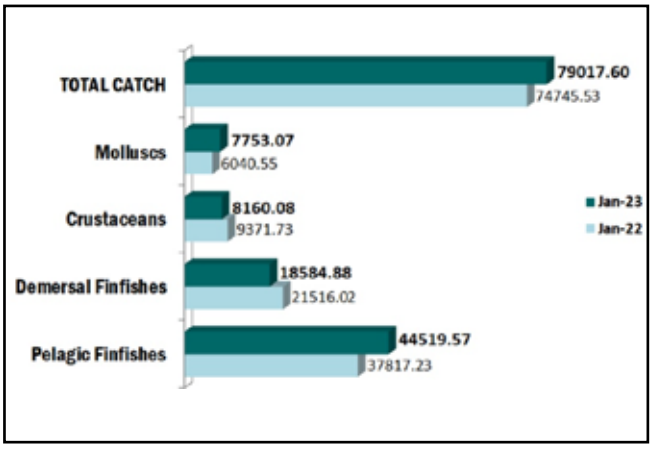


Fig. 1: Catch composition of marine landings (in tons) (Jan. 2022 & Jan. 2023)

It was comprised of 44,519.57 tons of Pelagic finfishes (56%), 18,584.88 tons of Demersal finfishes (24%), 8,160.08 tons of Crustaceans (10%) and 7,753.07 tons of Molluscs (10%) (Fig.1).

Out of the 257 species of marine finfishes and shellfishes reported during the month, the major five contributors were *Sardinella longiceps, Rastrelliger kanagurta, Lepturacanthus savala, Nemipterus japonicus* and *Sepia pharaonis* (Table 1).

Table 1: Major five fish species landed during January 2023

Sl. No.	Common name	Scientific name	Qty. in tons
1	Indian oil sardine	*Sardinella longiceps*	13092.81
2	Indian mackerel	*Rastrelliger kanagurta*	8632.90
3	Ribbon fish	*Lepturacanthus savala*	6497.19
4	Japanese thread fin bream	*Nemipterus japonicus*	4632.89
5	Pharaoh cuttlefish	*Sepia pharaonis*	2094.96

Analysing the group-wise landing, Sardines, Mackerels, Ribbon fishes, Threadfin breams and Coastal shrimps were observed as the major items recorded during the month (Fig 2). More than 53 % of the total catch was composed of these five fishery items.

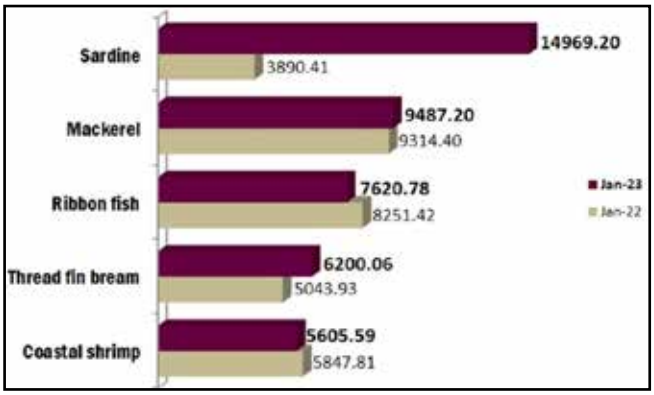


Fig. 2: Major five fishery items landed (Jan. 2022 & Jan. 2023)

Among Pelagic finfishes, the landing of Sardines was very high during the month. Other major pelagic items reported were Mackerel and Ribbon fish. Among Demersal finfishes the Threadfin breams and Croakers were the most landed items.

In the case of Crustaceans, more than 68 % catch was comprised of different species of Coastal shrimps, in which the dominant species were *Karikkadi* shrimp (1,636.02 t) and *Poovalan shrimp* (1,556.74 t). Squid and Cuttlefish were the major Molluscs resources landed.

State-wise landings: The highest landing was reported from the Karnataka state, which was to the tune of 18,368.20 tons (23 % of total catch). The states of Kerala and Gujarat followed in the line with a share of 21 % and 19 % respectively (Fig. 3). The landings from West coast states had together formed 71 % of the total catch. The least marine landing for the month was reported from Andhra Pradesh.

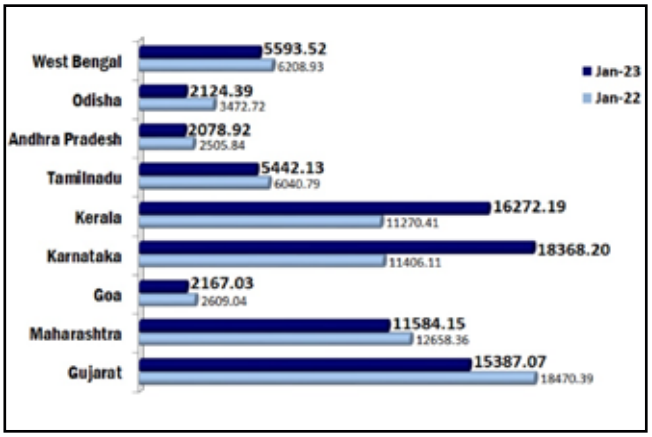


Fig. 3: State-wise marine landings (in tons) (Jan. 2022 & Jan. 2023)

Harbour-wise landings: The Malpe and Mangalore harbours in Karnataka had recorded the maximum fish landings during January.

The major ten harbours in terms of total catch quantity landed is given in table 2.

Table 2: Top ten harbours with highest landings

Sl. No.	Harbour	Quantity (tons)
1	Malpe	5934.10
2	Mangalore	5770.19
3	New Ferry Wharf	3913.96
4	Veraval	3199.72
5	Mangrol	3074.42
6	Porbandar	3011.55
7	Munambam	2980.35
8	Okha	2919.73
9	Vanakbara	2752.93
10	Ratnagiri	2671.75

II.Observation on boat arrivals

The number of fishing vessel arrivals reported from the 91 fish landing sites during the month totalled to 37,735 nos. The highest number of boat arrivals had occurred in Kerala and then in Gujarat (Fig. 4).

The state which reported least number of boat arrivals was Odisha. Among the harbours, Mangrol (1,774 nos.) and Veraval (1,606 nos.) in Gujarat had topped the list in terms of highest number of boat arrivals.

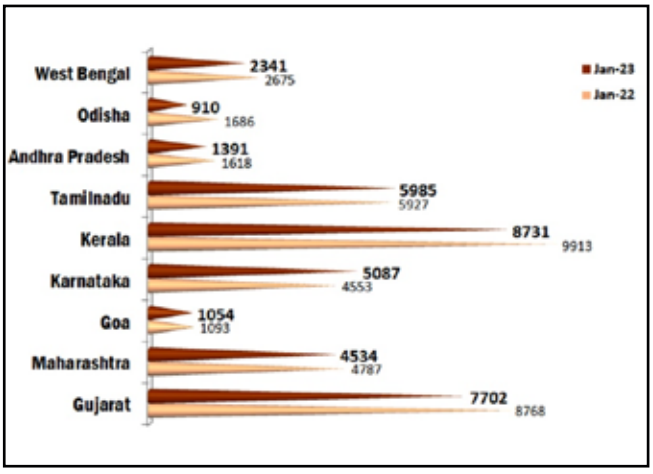


Fig. 4: State-wise boat arrivals (nos.) (Jan. 2022 & Jan. 2023)

Summary: A total of 79,017.60 tons of marine landings and 37,735 nos. of boat arrivals were reported during January 2023 from 91 major fishing harbour/landing centres in India. From November 2022, the total catch is declining and the trend continued in January as well, registering a decrease by 17,921.69 tons than that of December. The number of boat arrivals also showed drop, which was to the tune of 2,082 nos. compared to that of previous month.

The Pelagic finfish resources continued as the major contributor to the total catch and the Indian Oil Sardine continued in the first position in terms of the most landed species of the month. Karnataka remained in the first place among the states in terms of total catch landed whereas Kerala attained the first place in terms of the highest number of boat arrivals.

Among the various landing sites, the Malpe harbour attained the first position in terms of total catch landed and the Mangrol harbour continued in the first place in terms of highest number of boat arrivals.

Import alert removal: A costly and complex process

Ms. Ranjeet Klair, Director, Food Safety, The Acheson Group
Klair@AchesonGroup.com

U.S. Food and Drug Administration (FDA)

Regulated products that are imported into the U.S. must comply with the same laws and regulations that apply to domestic products. When products are found to not be in compliance, they will be refused entry to the US and the entity exporting the product to the US may be placed on an import alert. At the end of February 2023, there were more than 2,000 active Import Alerts from 170 countries, with the greatest number of shipments being from China, Mexico, Canada, and India. Just what does it mean to be on Import Alert – and what does it take to be removed from the "Red List"?

What is an Import Alert?

When FDA has evidence that an imported product appears to be in violation of regulations, the agency recommends that the product and/or company be placed on an Import Alert. If the recommendation is deemed valid, the product/company is placed on an Import Alert "Red List" resulting in the automatic Detention Without Physical Examination (DWPE) of all future shipments until the import alert is resolved. Each import alert relates to a specific type of violation. For example, pesticides in a product or Salmonella in a product.

What does a DWPE mean?

When a company is on an import alert they are still allowed to submit the product for entry into the U.S. But each shipment will be held at the port of entry and will not be allowed to enter unless the product has been tested by an approved laboratory for the agent of concern (e.g.,Salmonella) using a testing protocol and laboratory that FDA will review. Once the testing is done the results are sent to FDA, and if FDA accepts the results and the product is compliant it will be allowed to enter the U.S. The entire cost of this process (testing, holding of product etc.) is borne by the company trying to import the product into the U.S. For each shipment, the process can take many weeks, so it is a complex and costly process.

How does a company get off the Import Alert?

In very simple terms, getting off an Import Alert requires that the conditions that caused the violation be resolved, and the company submits a petition for removal with sufficient evidence to give FDA confidence that future entries will be in regulatory compliance. Unfortunately, the process to do so is not quite as simple as this sounds.

While FDA provides general requirements for removal, the evidence required by FDA will differ depending upon the nature of the violation, the reason for the DWPE, and the specific requirements included in the "Guidance" section of the Import Alert. This evidence required in the petition will likely include a root cause analysis to determine the source of the violation, a description of the corrective actions and/or preventive measures put in place to prevent the violation from occurring in the future, verification that they are effective, and FDA acceptance of five consecutive compliant shipments into the U.S. Each one of those five shipments will have to go through the hold-and-testing process described earlier.

When can the petition be submitted?

A company should never submit the petition to FDA until it has conducted a complete, well-developed root cause analysis (which can take weeks or even months), implemented corrective action, and verified that that the corrective actions address the root cause and will prevent future occurrence.

As this process is occurring the company can begin to write up the root cause analysis, corrections and verification that will be submitted as evidence of future compliance in the petition. The recommendation is that once the corrective actions have been made with

appropriate verification the company also can begin the process of shipping compliant product to fulfill the five consecutive shipment requirement. When these shipments arrive at the U.S. port, the importer of record will receive an FDA notice that they had been DWPE. The company can then hire a third-party lab in the U.S. to conduct sampling to demonstrate the goods are in compliance. If accepted as such by FDA, the shipment will be released and the company can use the compliant shipment as evidence in the petition for removal.

Clearance of each shipment typically takes three to four weeks, and to be used as evidence in the petition, five consecutive shipments must be deemed compliant. Once all four factors are completed (root cause analysis, corrective action, verification, consecutive shipment release), the petition can be submitted. In some cases, the petition can be submitted before showing five consecutive shipments, for example to enable an importer to attain customers for the five shipments. In such cases, if FDA accepts the root cause analysis and corrective action plan, they may accept the petition, with the condition that five consecutive shipments be sent with the new controls in- place.

What needs to be included in the petition?

The specific items to be included in a petition for removal include:

- Cover letter. This is the statement requesting that the firm/product be removed from DWPE. It must prominently note the Import Alert number, name and address of the firm petitioning for removal, the products requesting to be removed, and the entry numbers of released shipments.

- Supporting evidence. This section provides FDA with root cause analysis, description of corrective actions/preventive measures and their verification. As applicable, it also may include proof of registration or listing, third-party laboratory analyses, third-party audits, copies of product labeling, training records, certificates of analysis, etc.

- Other information. As required by the Guidance section of the Import Alert.

How will I know if the petition is accepted?

Once FDA's review is complete, the agency will issue a letter indicating whether the petition met the criteria for removal from DWPE. If met, the letter will indicate the removal. If not met, the letter will indicate the reasons that the request did not meet the criteria. Some causes of denial include:

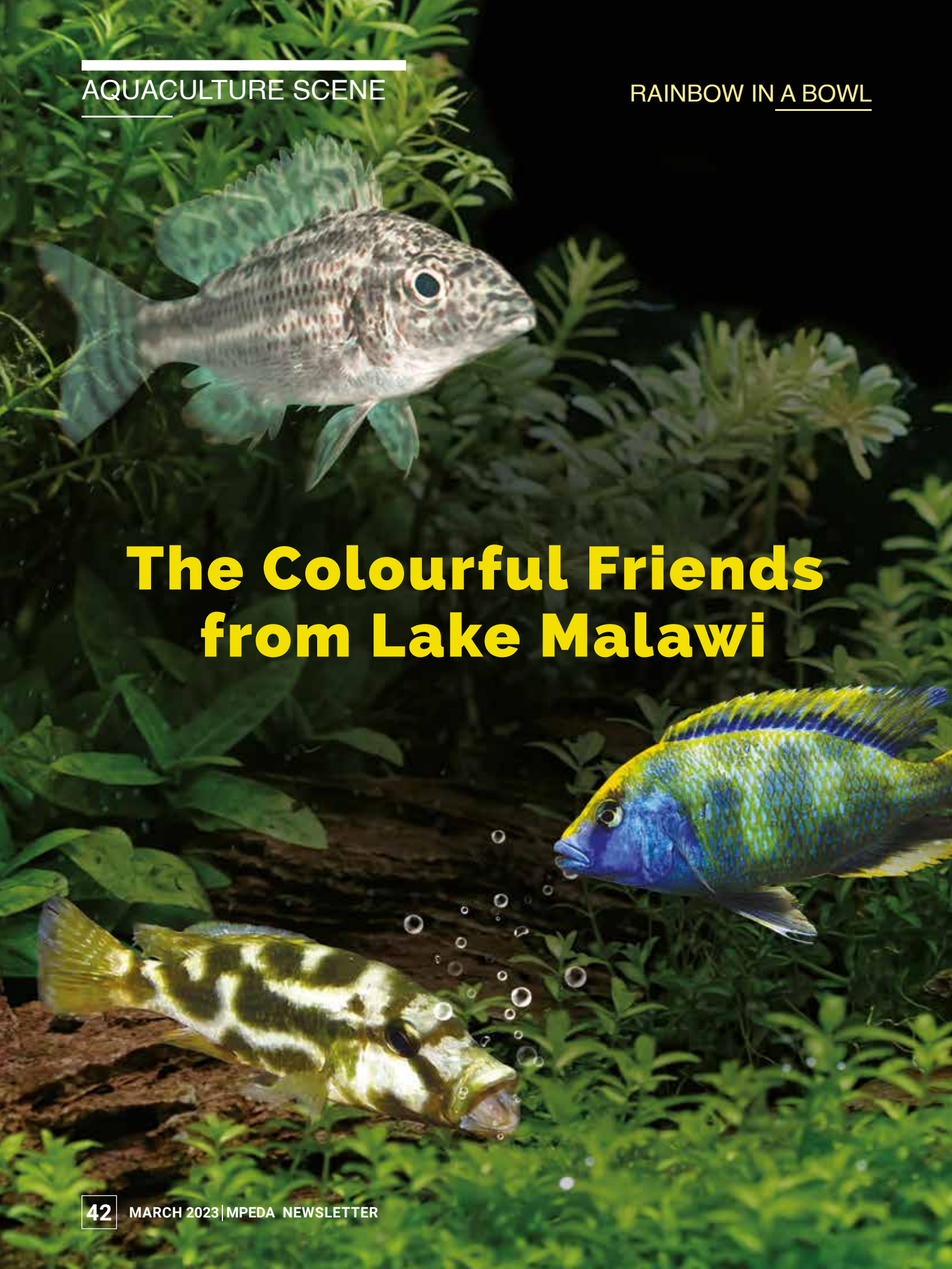
- Failure to submit the steps the company took to correct the violations.
- Failure to present evidence giving FDA confidence that future shipments will be in compliance.
- Failure to submit entry documentation for five (5) consecutive, compliant shipments.
- Failure to submit other information required by the Import Alert.
- Reoccurrence of the violation.

Once the letter is issued, the case is considered closed. For subsequent requests, a new petition would need to be submitted.

How can TAG help?

Import alerts are costly for the impacted business, and the process for getting off an import alert is complex and challenging. If a company has a petition rejected it may be looking at many more months of business disruption. So it is very important to get the petition for removal from the import alert right the first time. This is where TAG can help. TAG's regulatory expertise and experience in company and product removal from Import Alert can assist you in both the root cause assessment and corrective verification to help you successfully petition for and achieve removal from Import Alert. TAG manages this process by reviewing communications and documentation to provide a gap analysis and recommendations on next steps and further documentation required to address the concerns. In the resolution phase as TAG assists in addressing and resolving the open case, writing the petition, and liaising with the FDA as needed, to help the company be moved to a Green Light Status with the FDA.

The Colourful Friends from Lake Malawi



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.

Originating from Lake Malawi, the cichlid *Nimbochromis* sp has been popular in the aquarium hobby since its introduction in the late 1960s. Malawian cichlids have been conveniently divided into three main groups: rock dwelling cichlids or *mbunas;* peacocks mainly of the genus *Aulonocara;* and "haps", short for the generic name *Haplochromis. Nimbochromis* was one of the smaller groups reclassified under the "haps". The genus *Aulonocara* and *Haplochromis* have been grouped under the non-*mbuna*. There are many species in each group but they have some common characteristics which will be of interest to the hobbyists. *Mbuna* are smaller in size, colourful, herbivorous, more active and aggressive while non-*mbuna* are less aggressive, considerably larger in size and omnivorous.

The species *Nimbochromis,* belonging to the non-*mbuna* group are popularly known as blotched or large-spotted cichlids. The Latin name 'nimbo' meaning "rainy" or "stormy" refers to the dark, clouded spots and blotches on the body. Besides the bright colours of the males, the patterns of the females are most interesting.

While seven species of *Nimbochromis* have been recorded from Lake Malawi, species such as *N. livingstonii, N. linni, N. polystigma, N. venustus* and *N. fuscotaeniatus* are of much importance to the hobby. Compared to the *mbunas,* this group will reach a length of 22 – 25 cm, hence they require larger aquaria and regular feeding with meaty food for breeding in captivity.

They are maternal mouth brooders. In *N. fuscotaeniatus* the eggs are fertilized by the male before the female picks them up in her mouth. The female will guard the fry for a few days after releasing them and will take them back up in her mouth for protection. They prefer hard alkaline water of pH 7.5 – 8, hardness 10 – 12 dH with temperature ranging from 21 – 22.5°C. They will take flake and pellet foods and also meaty food.

N. livingstonii is the most interesting among this group, known popularly as "Kaligono" or sleeper among the Malawians as this species pretends to be dead to capture its prey. They grow up to 25 cm size with large spots on the body. Their habitat is in the intermediate areas. The species is widely bred in the aquarium trade.

N. linni, with its mouth at the end of its long snout somewhat resembling an elephant's trunk, is known as the elephant-nose hap. The body is covered with many small spots that are hidden in the males when they are in their blue breeding colour. The morphologically adapted long snout allows them to prey on small fishes in the rocky habitat. This species is very sensitive to poor water quality and is not as easily bred as other species of *Nimbochromis.*

N. polystigma grows to a maximum size of 22 cm. The male has a dark blue body colour that hides the spotted pattern. It is similar in colouration to *N. livingstonii* except for smaller and numerous spots on the body. It also adopts a sleeping behaviour while hunting its prey. It is not as common in the hobby as *N. livingstonii.*

With slightly yellowish body colouration and large brown spots hidden by deep blue colour in males, *N. venustus* is an interesting specimen in the aquarium. Males also develop a bright sulphur-yellow blaze that extends from the tip of the snout down back to the top of the caudal fin which gives them a visually stunning colouration. They are found over sandy habitats and occasionally adopt the 'sleeping' behaviour at the sandy bottom while waiting for smaller fishes to approach. They are widely bred and traded in the market.

N. fuscotaeniatus have a brown pattern of stripes rather than spots hidden by bright turquoise-blue colouration in the males. Its blotches are arranged in a somewhat horizontally striped pattern. It will hunt its prey and lives in the vegetated shallow areas of the lake.

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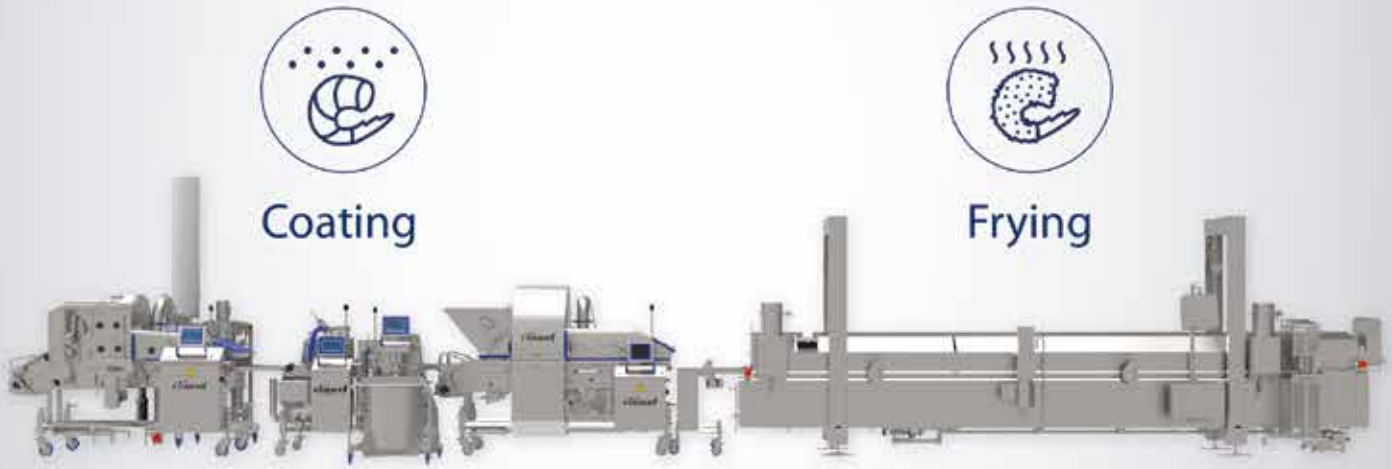

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Details of the SPF *L. vannamei* brooders imported & quarantined at AQF during January 2023

Sl. No	Name of the stakeholders	State	Country of origin/ supplier	Date of receipt of the lot at AQF arrival	Broodstock imported (nos)		
					Male	Female	Total
1	Sun Shine Marine	Tamil Nadu	SIS; Florida	08.01.23	150	150	300
2	Ravi Hatcheries	Andhra Pradesh	SIS; Florida	11.01.23	300	300	600
3	Rajvarma Hatcheries	Andhra Pradesh	SIS; Florida	13.01.23	300	300	600
4	Sree Kamadhenu Aquatech Pvt. Ltd - Prakasam	Andhra Pradesh	SIS; Florida	13.01.23	300	300	600
5	Golden Marine Harvest - Unit IV	Tamil Nadu	Blue Genetics; Mexico	16.01.23	400	400	800
6	Fedora Sea Foods Pvt. Ltd	Andhra Pradesh	Syaqua Americas Inc; Florida	16.01.23	200	200	400
7	Vaisakhi Bio Marine Pvt. Ltd - Unit III	Andhra Pradesh	Syaqua Americas Inc; Florida	16.01.23	500	500	1000
8	Sapthagiri Hatcheries - Unit II	Andhra Pradesh	SIS; Florida	18.01.23	400	400	800
9	Sapthagiri Hatcherie	Andhra Pradesh	SIS; Florida	18.01.23	400	400	800
10	Golden Prawns Pvt. Ltd	Andhra Pradesh	Blue Genetics; Mexico	19.01.23	300	300	600
11	Anjaneya Marine Hatcheries	Andhra Pradesh	SIS; Florida	19.01.23	190	190	380
12	Sandhya Aqua Exports Pvt. Ltd	Andhra Pradesh	SIS; Florida	19.01.23	225	225	450
13	Varun Hatcheries	Andhra Pradesh	SIS; Florida	19.01.23	200	200	400
14	Prince Aqua Pvt. Ltd	Andhra Pradesh	SIS; Florida	20.01.23	600	600	1200
15	Pavani Hatcheries	Tamil Nadu	SIS; Florida	20.01.23	300	300	600
16	Golden Marine Harvest - Unit IV	Tamil Nadu	Blue Genetics; Mexico	21.01.23	200	200	400
17	Gaayathri Bio Marine	Andhra Pradesh	SIS; Florida	21.01.23	280	280	560
18	Gayathri Hatcheries	Andhra Pradesh	SIS; Florida	21.01.23	300	300	600
19	Vandayar Hatchery	Tamil Nadu	SIS; Florida	21.01.23	200	200	400
20	Regal Bio Marine Hatchery	Tamil Nadu	SIS; Florida	22.01.23	250	250	500
21	Star Aqua Hatchery	Tamil Nadu	SIS; Florida	25.01.23	150	150	300
22	Srinivasa Hatcheries	Andhra Pradesh	Syaqua Americas Inc; Florida	27.01.23	200	200	400
23	Sri Srinivasa Hatcheries	Andhra Pradesh	Syaqua Americas Inc; Florida	27.01.23	300	300	600
24	Vaisakhi Bio Marine Pvt. Ltd - Unit III	Andhra Pradesh	American Penaeid; Florida	28.01.23	260	260	520
25	Sapthagiri Hatcheries - Unit II	Andhra Pradesh	Syaqua Americas Inc; Florida	30.01.23	200	200	400
26	Sri Manjunadha Hatcheries	Andhra Pradesh	Syaqua Americas Inc; Florida	30.01.23	300	300	600
TOTAL					**7405**	**7405**	**14810**

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Farmers exposure trip

44 farmers of NaCSA Societies under SC/ST category from states of Odisha, West Bengal and Andhra Pradesh attended the 23rd India International Seafood Show (IISS 2023) held from 15th to 17th February 2023 at Biswa Bangla Mela Prangan, Kolkata, West Bengal.

The society farmers of Andhra Pradesh (13 Nos), West Bengal (14 Nos) and Odisha (13 Nos) attended show on 15th February 2023 and visited the stalls along with NaCSA officials. On 16th February 2023, all these farmers visited the State Fisheries Development Corporation (SFDC) at Henry's Island along with NaCSA officials. The farms of SFDC Ltd., at Henry's Island, West Bengal which was established during 1966 for promotion of pisciculture in the State of West Bengal. Sewage fed fisheries, Sweet water fisheries and brackish water fisheries were the main activities of this Corporation. Mr. Debabrata Das, Project In-charge, SFDC of Henry's Island project informed that the prime objective of the project and explained on the culture practices of different diversified species of fishes/shrimp etc.

Farmers at IISS 2023

Farmers visited the NaCSA stall in IISS 2023

NaCSA Society Farmer exposure tour to Henry's Island Fisheries Project

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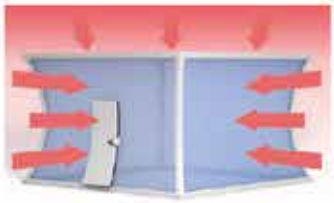

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Farmers meet

Mangalore

MPEDA Mangalore organized a one day farmers meet on 23rd December 2022 with an aim to promote diversified aquaculture in Karnataka with commercially important species, by associating the fish farmers and other aqua entrepreneurs in Yadgiri district.

The meet had the theme 'Prospects of diversified aquaculture', and a participation of 65 farmers. The technical sessions were handled by Mr. Venkateswara, ADF, Yadgiri, Dr. Kotresh Prasad, Scientist, KVK, Yadgiri and Dr. Sharan Bhobal Reddy, Lecturer.

Farmer's day was also celebrated along with the farmers meet and five farmers from Yadgiri district who made considerable achievement in freshwater aquaculture and other agriculture activities were felicitated during the programme.

Inaugural session of the farmers meet

Mr. K. Nararyana Naik, Lead District Manager, SBI, Yadgiri during his inaugural address

View of the participant during the farmer's meets

Farmers felicitated along with the dignitaries

Kerala

MPEDA Regional Division, Kochi organized a farmers meet on "Eco-friendly and sustainable *L. vannamei* farming" for the benefit of *L. vannamei* farmers in Kannur, Kasargod and Kozhikkode districts on 2nd February 2023 at Kannur. A total of 70 farmers participated in the meet.

Presidential address by Mr. C. Sureshan, Member, Executive Committee, Kerala Aqua Farmers Federation

Mr. Geo Christi Eapen and Mr. Bijimon P. JTOs, MPEDA handle the technical sessions

Mr. Johnson D' Cruz, Deputy Director, MPEDA giving lecture to the trainees

Training programmes by MPEDA

Mangalore

MPEDA Regional Division, Mangalore organized a five day training programme on "Better Management Practices for Sustainable Aquaculture" for ST beneficiaries in Pothnal, Manvi Taluk, Raichur district during 5th to 9th January 2023. A total of 24 participants attended the training programme.

The area is resided by many families belonging to SC/ ST communities who can surely opt aquaculture as an alternative livelihood source. This can generate employment opportunities to both skilled as well as unskilled youths.

A field trip was arranged for trainees on the fourth day to the proposed GIFT Tilapia demonstration farm of MPEDA, which belonged to Mr. Devendrappa. Training Certificates and stipend were distributed to the trainees.

View of the trainees

Inaugural function of the training programme

Cage fabrication for fish Nursery rearing

Dr. Ganesh K., Assisant Director distribute the certificates

Vizag

MPEDA SRD, Vizag initiated to conduct a 5 - days training program in the field of Aquaculture on "Better Management Practices and Diversification in Aquaculture" for SC/ST beneficiaries. The training program was conducted from 30th January 2023 to 3rd February 2023 at Gara Mandal, Srikakulam district, Andhra Pradesh for 20 SC/ST beneficiaries/farmers.

Inauguration of the training program by Mr. R. Prasad Naik, Assistant Director, MPEDA, Vizag & Mr. Anandkumar, Jr. Technical Officer, NaCSA, Kakinada, Mr. T. Santosh Kumar, Assistant Director, Department of Fisheries, Srikakulam

Mr. R. Prasad Naik, Assistant Director, MPEDA delivers lecture

Distributing of certificates & stipend to the trainees by Mr. Dhirit Ekka, Dy. CEO, NaCSA (left) and Mr. Prasad Naik, Assistant Director, MPEDA (right)

Trainees with MPEDA officials

MPEDA, SRD Visakhapatnam organized a 3-days General training programme on the topic training report on "Better Management Practices and Diversification in Aquaculture" for general beneficiaries.

The training programme was conducted from 29th December 2022 to 31st December 2022 in Kollipadu Village, Santhabommali Mandal, Srikakulam district for 20 general beneficiaries.

Inauguration of the training programme by Mr. Prasad Naik, Assistant Director, MPEDA, Vizag

Field visit of the trainees to Kollipadu village

Trainees with MPEDA officials

Kerala

MPEDA Regional Division Kochi organized 5 - days training programme for ST beneficiaries on "Eco-friendly and sustainable aquaculture through species diversification" at training centre under Mukkali Forest Station, Silent Valley Forest Division, Palakkad district from 16th – 20th January 2023. The training programme was organized in association with Bionatural club, Kerala and Eco Development Society (EDC) under Mukkali Forest station.

Welcome speech by Mr. Geo Christi Eapen, Jr. Technical Officer, MPEDA

Mr. Bijimon P., Jr. Technical Officer, MPEDA handling technical session

Field visit of trainees to polyculture fish farm in Puthur, Palakkad district

Mr. Johnson D' Cruz, Deputy Director, MPEDA Kochi, distribute certificates to the trainees

AQUACULTURE SCENE

Kolkata

MPEDA, Regional Division, Kolkata organized a five-day training programme on "Eco friendly sustainable aquaculture" at Daudpur, Sandeshkhali-II, North 24 Parganas district, from 21st to 25th February 2023 for SC/ST category beneficiaries.

The main objective was to educate the farmers on sustainable farming by adoption of BMPs. The programme was attended by 20 of trainees.

Mr. Darshan Lal Dhondiyal, Assistant Director, MPEDA, RD, Kolkata distributes the certificate to a trainee

Trainees on field visit to Manipur, North 24 Parganas district

View of the participants

MPEDA conducts Seafood HACCP training programme at Tuticorin, Tamilnadu

MPEDA organized four days training programme on HACCP for the QC technologists working in seafood processing and pre-processing units at Tuticorin from 31st January 2023 to 3rd February 2023. The purpose of the training programme was to empower the technologists of the seafood processing establishments of Tuticorin region with seafood HACCP and related regulations. 27 technologists working in different seafood processing establishments attended the training programme.

Training programme formally inaugurated by Dr. B. Ahilan, Dean, Fisheries College and Research Institute, Tuticorin by lighting the traditional lamp. Addressing the gathering, he emphasized on the importance of safety of seafood products exported from our country. Mr. M. M. A. Siddeek, Vice President, SEAI- Tamil Naduduring his felicitation pointed out the significance of training programme in HACCP implementation for the benefit of seafood processing technologists in India towards capacity building in HACCP implementation and compliance towards international markets. He also requested the participants to get clarity on seafood HACCP implementation. He also urged the technologists to train their processing plant workers after successful completion of this training.

Dr. Ram Mohan M. K, Joint Director (QC) highlighted the present scenario of the Indian seafood export and hazards related to seafood industry, emphasizing the importance of implementation of HACCP in seafood industry and significance of training programme. The programme started with welcome address by Mr. S. Asok Kumar, Deputy Director, MPEDA SRD Tuticorin, who narrated the role and effective implementation of HACCP in seafood processing establishments. He also advised the trainees to take maximum advantage of the experienced USFDA trained faculty from MPEDA for the effective implementation of HACCP in their respective seafood processing establishments. Ms. Ebcifa, Technical Officer, SRD Tuticorin, proposed the Vote of thanks.

Dr. Ram Mohan M. K, Joint Director (QC), Dr. Biji K. B., Junior Technical Officer (QC), Mrs. Preetha Pradeep, Technical Officer, Mr. S. Asok Kumar Dr. Ansar Ali A., Deputy Directors handled the technical sessions.The training programme covered Current Good Manufacturing Practices, Sanitation Standard Operating Procedures, principles of HACCP, Hazard analysis, development of HACCP plan form.

Dr. B. Ahilan, Dean, Fisheries College and Research Institute, Tuticorin offering inaugural address

Demonstration on importance of hand washing and sanitizing during the training programme

Participants with the faculty members

Apart from above, faculty also covered classes on US Seafood regulations, EU Directives and National Regulations/Standards, traceability followed by practical sessions in different groups for preparation of SSOP documents, development of HACCP Plan for various seafood products.

Later participants were divided into groups and prepared HACCP plan form for various products and presented by the representative of each group and discussed pros and cons in each and every HACCP plan form. The training programmes were concluded with formal valedictory function,which was presided over by Mr. S. Asok Kumar and Dr. Ansar Ali A., Deputy Directors of MPEDA. Certificates were distributed to the participants.Participants attended the training thanked MPEDA for organizing the training programme in their region.

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New shrimp feed with partial fishmeal and fish oil replacement are shown to reduce the formulation's carbon footprint

Skretting Ecuador, part of Dutch animal nutrition company Nutreco, will produce a new shrimp feed that will partly replace two ingredients – fishmeal and fish oil – with insects and algae. This will help increase the diversity and flexibility while reducing the marine carbon footprint in feed formulation. The feed will be used by Klaas Puul's suppliers in Latin America to produce shrimp for Albert Heijn (the largest supermarket chain in the Netherlands), and possibly other retailers in dedicated ponds in Latin America."This will help us meet the targets of our Sustainability Road Map 2025, particularly ensuring 5-10 percent inclusion of novel ingredients in feed formulations," said Carlos Miranda, general manager of Skretting Ecuador. "We are proud of being part of this value chain collaboration that will move the needle forward to bringing a sustainable solution to end consumers."

The fishmeal will be partially replaced by Protix's insect meal, made from black soldier fly larvae, which recently achieved excellent sustainability scores in an independent Life Cycle Assessment. The fish oil will be partially substituted by Veramaris's MSC/ASC-certified algae oil. Skretting Ecuador said that this is a restorative source of the essential omega-3 fatty acids EPA and DHA, necessary for the health and performance of farmed shrimp. "One hundred percent of the remaining marine ingredients will be sourced from seafood processing byproducts, and all will be traceable back to MarinTrust-accredited fisheries in Ecuador," stated Skretting Ecuador in a press release. "What's more, the soy in the feed will be sourced from deforestation-free and land-conversion-free origins, making the feed proposition a significant improvement in terms of environmental responsibility compared with most conventional shrimp feeds on the market today."

Over the next three years, the consortium partners will continue to improve the feed formulation according to their own sustainability goals, drawing on developments within the field of shrimp nutrition, while also "adjusting to the rapidly changing ingredient market." Over time, the consortium will increase the inclusion rates of insect meal and algae oil and look at other options to further reduce dependency on marine ingredients. The consortium will also guarantee that all shrimp are produced from non-ablated broodstock and is ASC certified.

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G-2, Concord Apartments 6-3-658, Somajiguda, Hyderabad - 500 082, India.
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H.No.: 3, Plot No.: 3, Baymount, Rushikonda, Visakhapatnam - 530 045, Andhra Pradesh.