



Fish meal industry : issues & challenges

A CATALYST FOR THRIVING FISHERMEN
LIVELIHOODS
&
SUSTAINABLE AQUACULTURE

Presentation by:

Mr. Dawood Sait (President)

IMIA - Working Towards Sustainable Fisheries Better Tomorrow



Who are we?

The Indian Marine Ingredients Association (IMIA) is a non-profit organization that aims to promote and develop sustainable practices in the Indian fishmeal and fish oil industry.

IMIA - Working Towards Sustainable Fisheries Better Tomorrow



Our Objectives

- To bring together all stakeholders of the industry, including fishermen, researchers, feed mills, government bodies, NGO'S and other relevant parties to collaborate and work towards sustainable fisheries management.
- To promote the responsible use of marine resources and protect the long-term health of the marine ecosystem.
- To advocate for the interests of the Indian fishmeal industry and to create a favorable policy environment for its growth and development.

IMIA - Working toward the greater good of the country's fisheries sector



IMIA aims to:

1. Promote environmentally and socially responsible practices in the Indian fishmeal and fish oil industry.
2. Encourage and support research and development to improve the quality and sustainability of the products.
3. Actively participate in policy-making dialogues and ensure that the industry's interests are represented.
4. Facilitate industry-wide cooperation and communication to ensure that all stakeholders work together for the common good.
5. Signing a Memorandum of Understanding (MoU) to establish a more formal cooperation agreement between the government and the industry association, ensuring more effective collaboration in achieving common goals.

Through open and transparent discussion and collaboration, IMIA aims to ensure the interests of the fishers and fishmeal industry are protected and promoted.

Who we stand for?



The success of the PMMSY Scheme, which aims to promote sustainable fisheries and aquaculture, is closely tied to the availability of fishmeal and oil. Over a period of nine years, the cultured fish production in India has more than doubled, showcasing the positive impact of fishmeal in supporting the growth of the aquaculture sector.

The fishmeal industry ensures fair prices are provided to fishers and the industry for their discards and unsold catches. By converting these discards and unsold catches into valuable protein resources, the industry minimizes waste and maximizes the utilization of available resources.

In summary, the fishmeal industry in India is a crucial component of the aquaculture sector, providing essential protein resources, contributing to employment and foreign exchange earnings, and supporting the growth of sustainable fisheries and aquaculture initiatives and the livelihood of 25 million fishers and fish farmers of the country.

Fishmeal facts



Fishmeal is an essential protein source that plays a vital role in the growth of Indian aquaculture. It is produced from bycatch and seafood discards, including unsold and excess pelagic fish landings.

The fishmeal industry in India has made significant investments, amounting to approximately Rs 30,000 crores, and has created employment opportunities for 25,000 individuals directly and around 4 lakhs indirectly

India holds the position of being the third-largest producer and exporter of fishmeal. The fishmeal and oil industries have also contributed significantly to foreign exchange earnings, amounting to \$507.96 million through exports.



Enormous value addition in the fish meal bi-products.

Investment in post-harvest sectors, especially inland fisheries, holds great growth potential. Emulating China and Japan's success in fish oil value addition, such as refining and omega-3 extraction, can enhance its quality for diverse applications like supplements and pharmaceuticals, fostering revenue streams and domestic industry development.

Similarly, there are opportunities for value addition in fishmeal. It can serve as a nutritious food source for school children, and further processing can improve its digestibility for animal feed, supporting growth in livestock and aquaculture industries.

Spray drying fish soluble paste can extend its shelf life, improve handling, and enhance nutritional value, facilitating storage, transport, and application in various food and feed products. Government focus on value addition can drive innovation, create jobs, and responsibly maximize fishery resource utilization with appropriate policies and infrastructure.

Global Scenario: Peru 1/3 The Size Of Indian Coastline No.1 In The World



- Peru is largest producers of Fishmeal In the world.
- Peruvian GDP greatly depends on fishmeal production.
- With 2500kms coastline Peru gives quota of 6million ton Anchovy for fishmeal.
- This is most sustainable fisheries with max output.
- The Government plays an active role in promoting and safeguarding the interests of the Fish Meal Industry

- Indian Fishmeal Industry is a victim of misconceptions, which is indirectly harming the reputation of the Indian Fish Meal Industry
- With 8700kms Coastline Indian , we draw 1/10 of Peruvian quota
- India Fisheries is also similar to Peruvian Pelagic fish Anchovy. We do have more than 5 small pelagic fish namely
- Sardine, Lesser Sardines, Mackerel, scad, also Anchovy.
- Quality of Fishmeal is much better than Peruvian in terms of quality, freshness, amino Profile.
- India can triple the production of fishmeal, if these fisheries are managed sustainably and responsibly.



"Nourishing Progress: Unveiling the Services of the Fish Meal Industry"



Environmental Sustainability | Fish Meal producers help the sector with a more sustainable alternative to the disposal of discards, ensuring the value additions of byproducts. We must be incentivized not penalized.

Food Security | Industry utilizes the Waste generated by the Fisherman Boats, their unsold stock and also the Seafood Industry discards, and converts into valuable protein source which has propelled the Indian Aquaculture Industry into the forefront of the Global Arena.

Nutritional Supplement for Aquaculture and Animal Feed | Fish Meal serves as a catalyst, fostering the growth, health, and productivity of farmed animals, thereby bolstering the efficiency and sustainability of both livestock and aquaculture. Positioned as a pivotal ingredient in the feed industry, Fish Meal's unparalleled benefits remain unmatched, with no viable alternatives discovered thus far.

Contributions to the Economy | Employment Generation and Revenue to the Exchequer



Misconception on the fish meal industry environmental pollution

- The fish meal and feed industry is essential for reducing waste in the seafood sector by repurposing discarded and unsold fish, especially pelagic species. Rather than causing pollution, it helps clear pollution-causing waste.
- Beyond waste reduction, the fishmeal industry gives value to fishers' discards, offering them livelihoods and creating a valuable protein source. This supports aquaculture growth and enhances food security. Moreover, the industry can generate substantial revenue.
- However, environmental concerns may stem from specific practices, and it's crucial for the industry to address these.
- Engaging in a constructive dialogue with the environmental department can help identify and implement sustainable solutions.
- Collaborative efforts that balance environmental conservation with economic and social contributions can lead to a more harmonious approach.
- Also setting up permissible limits as rest of the world.

Forging Ahead: Confronting Challenges & Struggles



- FISHEAL industry is struggling to get certified, due to non-cooperation from concerned government institutions and agencies. This lack of certification poses challenges to the industry in terms of sustainability and market acceptance.
- The BEST AQUACULTURE PRACTICE (BAP) certification agency has set a 2025 deadline for aqua feed producers, requiring that 75% of the fishmeal used in feed comes from a certified source. Failure to meet this requirement may have a negative impact on the growing aquaculture industry, particularly if locally sourced fishmeal is not certified.
- Obtaining the Marine Trust certification is crucial for marketing our aquaculture and fishmeal products at a premium value. This certification demonstrates our commitment to responsible fishing practices and environmental stewardship.

Overall, achieving fishmeal industry certifications is important for ensuring the sustainability, quality, and market acceptance of fishmeal products

Proposals in Focus



- We promote the concept of "One India One FIP" instead of small Fishery Improvement Projects (FIPs) managed by individual factories.
- FIPs should be jointly owned and managed by a government agency and industry association to ensure effective certification and implementation.
- We advocate for sustainable management and traceability of our pelagic fishes used for fishmeal production.
- The association also urges the freezing industry to collaborate with other stakeholders in pursuing certification and implementing sustainable practices.
- Collaboration between the industry, government agencies, and certification bodies is essential to overcome challenges and drive positive change in the industry.

Guiding Vision: Navigating Suggestions & Expectations



Effective Governance and Monitoring: Advocate for comprehensive regulation by the state fisheries department and enhanced monitoring of exports by MPEDA in the fish meal industry.

Regulatory Refinement for Service Industry: Transform restrictions on the service industry into a regulated framework to encourage responsible practices and sustainable growth in fish meal production.

Government Incentives for Industry Support: Call for government incentives to bolster the fish meal industry, recognizing its contributions to sustainability, food security, the economy, and the environment.

Streamlining Industry Collaboration: Address the challenge of multiple organizations by promoting streamlined collaboration to foster industry growth.

Promoting Protein Self-Sufficiency: Emphasize the need to reduce reliance on other countries for protein, urging strategic measures for enhanced national self-sufficiency.

There might be a lot of different challenges faced as per the multiple reasons and by addressing these challenges, the fish meal industry can really foster and add values in the economy.

Fish Meal Producers: The Reality.....



In fact, we are helping the industry/country by efficient utilization of the trash/by-catch



We are not interfering in the policy of fisheries or not catching fish



Government must support us for converting waste into resource



We must be incentivized, instead of penalizing.



Too many organizations hindering the growth of this industry

A new ray of hope: PMMSY



Giving thrust for production and promoting Biofloc technology, Circulatory Aquaculture System (RAS) etc.



All are intensive farming system and they feed based



Even in capture fisheries, the by-catch percentage has increased. So, we are utilizing it for Fish Meal



Fishmeal industry have lot of potential to triple by 2025 in a sustainable, if get support from the Govt Agencies.



A new ray of hope: PMMSY



Objectives of PMMSY:

Sustainable Sector Growth:

- Harness fisheries potential sustainably and inclusively.

Boost Production and Incomes:

- Double incomes, intensify production, and create employment.

Value Chain Modernization:

- Strengthen the entire value chain, from harvest to quality improvement.

Contribute to Agriculture:

- Increase fisheries sector contributions to Agricultural GVA and exports.

Security for Fishers:

- Ensure social, physical, and economic security for fishers and fish farmers.

Robust Regulatory Framework:

- Build a strong fisheries management and regulatory framework.



Fishery Improvement Project For All India



PHASE 1 :- KARNATAKA KERALA COAST

PHASE 2 :- TAMIL NADU COAST

PHASE 3 :- MAHARASTRA & GOA COAST

PHASE 4 :- GUJRAT COAST

PHASE 5 :- ANDRA & ORISSA COAST

Fishery Improvement Project For All India



The ultimate goal of the FIP project is to promote sustainability in the fisheries industry in India.

IMIA played a key role in bringing together most of the fish meal and fish oil producers of India under one umbrella organization.

The primary goal of IMIA is to promote the advancement and welfare of the fisheries industry, as well as contribute to the nation's foreign exchange earnings.





"Anticipating Accountability: Our Expectations from Government Departments"

Fishmeal & Oil, Surimi, Seafood, all above Industries relies on the same resources that doesn't know State Boundaries.

1. Shared Stock agreements between the States.

2. Defined harvest strategies

3. Mechanism to control the Harvest if depletion when Noticed (Harvest control rules)

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4. Scientist can recommend strategies & govt can strictly implement



Tackling the Immediate Problem at Hand

- Global perception of the fishmeal industry faced challenges due to moratorium decisions that unintentionally constrained the services sector rather than effectively regulating fisheries.
- It's apparent that the moratorium fell short of its intended goals, resulting in the exploitation of small producers by larger entities, making them key supply chain sources.
- Consequently, the lack of subsidies or benefits hampers the services industry's ability to formulate new sustainability strategies.
- A strategic overhaul of the framework or regulations is crucial to propel the growth of the fish services industry.

Could the proposed refinement of this moratorium pave the way for the well-being of fishers and ensure sustainable growth? A sincere appeal to the department to kickstart the necessary strategies is made.



Tackling the Immediate Problem at Hand

Fishmeal Industry Certifications:

1. FISHEAL industry is struggling to get certified, due to non-cooperation from concerned government institutions and agencies. This lack of certification poses challenges to the industry in terms of sustainability and market acceptance.
 2. The BEST AQUACULTURE PRACTICE (BAP) certification agency has set a 2025 deadline for aqua feed producers, requiring that 75% of the fishmeal used in feed comes from a certified source. Failure to meet this requirement may have a negative impact on the growing aquaculture industry, particularly if locally sourced fishmeal is not certified.
 3. Obtaining the Marine Trust certification is crucial for marketing our aquaculture and fishmeal products at a premium value. This certification demonstrates our commitment to responsible fishing practices and environmental stewardship.
- ***A sincere appeal to the department to kickstart the necessary strategies is made.***



Tackling the Immediate Problem at Hand

4. Indian Marine Ingredients Association (IMIA) promotes the concept of "One India One FIP" instead of small Fishery Improvement Projects (FIPs) managed by individual factories. IMIA believes that vested interests by trader lobbies are damaging the reputation of our highly sustainable pelagic fisheries. IMIA suggests that FIPs should be jointly owned and managed by a government agency and industry association to ensure effective certification and implementation.

5. IMIA strongly advocates for sustainable management and traceability of our pelagic fishes used for fishmeal production. The association also urges the freezing industry to collaborate with other stakeholders in pursuing certification and implementing sustainable practices. Overall, achieving fishmeal industry certifications is important for ensuring the sustainability, quality, and market acceptance of fishmeal products. Collaboration between the industry, government agencies, and certification bodies is essential to overcome challenges and drive positive change in the industry

- ***A sincere appeal to the department to kickstart the necessary strategies is made.***



Tackling the Immediate Problem at Hand

- GST Burden:
- Despite the fishmeal industry primarily processing discards and unsold stocks, it is burdened with GST. It is worth noting that other stakeholders in the chain, including fishers, feed producers, aqua farmers, and exporters, are exempted from this tax. This discrepancy places an additional financial burden on the industry, affecting its competitiveness. Currently, only six states generate this tax, and Tamil Nadu and Kerala have obtained a stay order against it.

Could the proposed refinement Pave the way for the well-being of Industry and ensure sustainable growth? A sincere appeal to the department to kickstart the necessary strategies is made.



ANY QUESTIONS???

FIP in Karnataka and Kerala

1st Stakeholder Meeting in Mangalore, 26 September 2022



FIP in Karnataka and Kerala

1st Stakeholder Meeting in Mangalore, 26 September 2022



First Stakeholder meet was great success as most of the stakeholder wear present



FIP in Karnataka and Kerala

1st Steering Committee Meeting in Mangalore, 27 September 2022



FIP in Karnataka and Kerala Reaching Out to Stakeholders



Advisor team discussed with fishmeal plant owners from Tamilnadu
who joined the 1st Stakeholder Meeting in Mangalore

FIP in Karnataka and Kerala Reaching Out to Stakeholders



College of Fisheries, Mangalore



FIP in Karnataka and Kerala Reaching Out to Stakeholders



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FIP in Karnataka and Kerala Reaching Out to Stakeholders



FIP in Karnataka and Kerala Reaching Out to Stakeholders



Fish Landing Port, Mangalore



FIP in Karnataka and Kerala Reaching Out to Stakeholders



Exclusive Workshop & Project Updates for Members



**INDIAN MARINE INGREDIENTS ASSOCIATION
CORDIALLY INVITES YOU TO JOIN OUR
EXCLUSIVE EVENT**

FIP (Karnataka & Kerala) Updates & Exclusive Workshop

December 12, 2022 3:00–6:30 p.m.
The Taj Getaway Hotel (Behind SBI BANK) Old Port Road Mangalore



Special (virtual) Workshop
"MarinTrust IP: How to Get your
Plant Certified"
By Ms.Sasiwimol Armanee
Expert on Sustainable fisheries and
seafood auditor (MSC/ASC/MarinTrust)



FIP (Karnataka & Kerala)
: Now & What's next?
By Mr. Duncan Leadbitter
FIP Expert/ Technical Advisor



Fishery Improvement Project For All India



TAMIL NADU COAST

FIP IN TAMIL NADU



1st STAKE HOLDER MEETING IN TAMIL NADU 14 DECEMBER, 2022



FIP IN TAMIL NADU



2nd Stakeholder Meeting in Tamilnadu held on 18th April 2023



FIP IN TAMIL NADU REACHING OUT TO STAKEHOLDERS



FIP IN TAMIL NADU

Reaching Out to Stakeholders



FIP in TAMIL NADU

Reaching Out to Stakeholders



FIP IN TAMIL NADU WORKING CLOSELY WITH ADVISORY TEAM



SIGNED MOA WITH MRAG





MAHARASHTRA & GOA

First Stake Holder Meeting Maharashtra 11th April 2023





Indian Marine Ingredients Association

Activities: Exhibition/Conference/
Workshop/Speaking engagement

India International Seafood show 2023



“
Featured the
sustainable
measures adopted
by the Indian fish
meal industry
”

MR. MOHAMED DAWOOD SAIT

President
Indian Marine
Ingredients Association (IMIA)



www.indianseafoodexpo.com



Platinum Sponsor @Seafood Show



Workshop Conducted With GSA



Meeting With Union Fisheries Minister Rupala Ji





THANK YOU

