Importance of traceability in today's customer preferences

Prepared for:22nd **India International Seafood Show 2020**

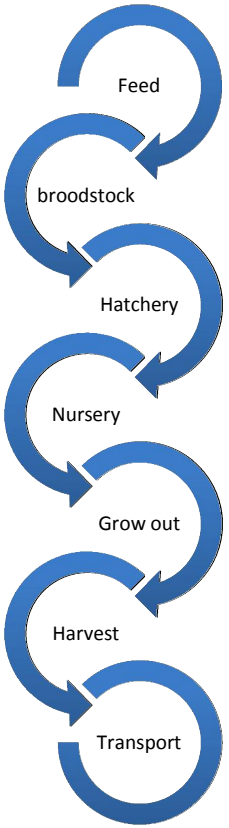
Presented by: **Marcelo Hidalgo; Founder & Advisor of Seafoodmatter**

Email: **contact@seafoodmatter.com**

Vellavilla, India / Tuna fishing @seafoodmatter

This presentation will cover

- Main concerns in the seafood market and retailers
- Traceability systems in the seafood value chain
- Seafood Traceability – complexity
- Market consumer preferences
- Take away

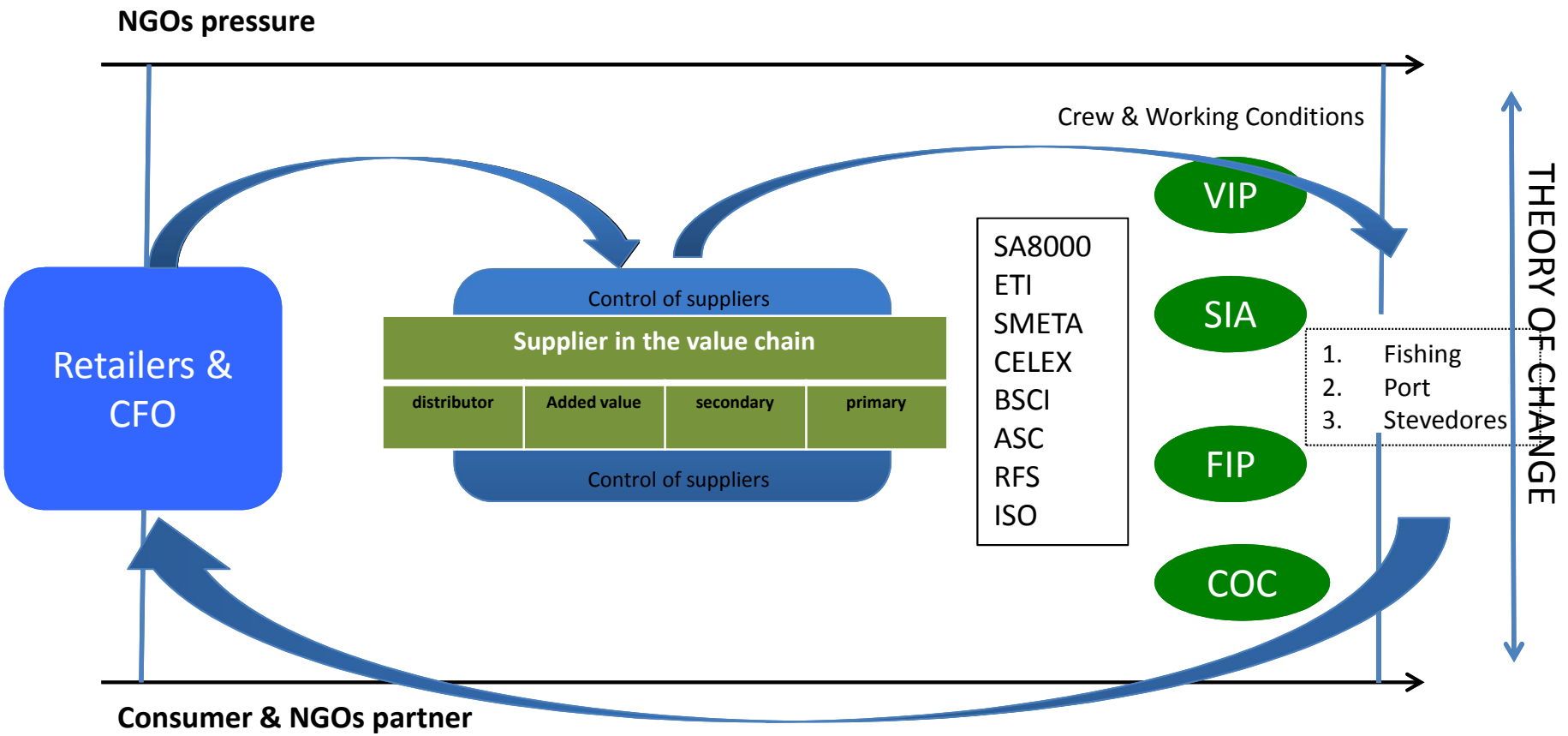


Shrimp farm in Cojimies, Ecuador/ Harvest @seafoodmatter

Current situation

- Marine catch was 79.3 m. MT (FAO 2016)
- Aquaculture production was 80 m. MT (FAO 2016)
- Global tuna catch 4.2 m. MT (FAO 2016)
- Shrimp produced 4.0 m. MT in 2018 (Globefish 2019)
- Increase in media coverage about social, legal, food safety and environmental aspects.
- World Economic Forum: WWF + private and public sector; new global traceability system.
- NGO's and governments pressure (retailer rating / scoring)
- Retailers ask for full traceability and accountability
- Every food should be fully traceable, say FDA
- Research Institute in South Africa; 21% of products in the market are mislabeled.

Market and external pressure
Theory of Chain – Value chain



Schemes markets ≠ Catching operation / schemes

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Market concerns

Boston Seafood Show @seafoodmatter

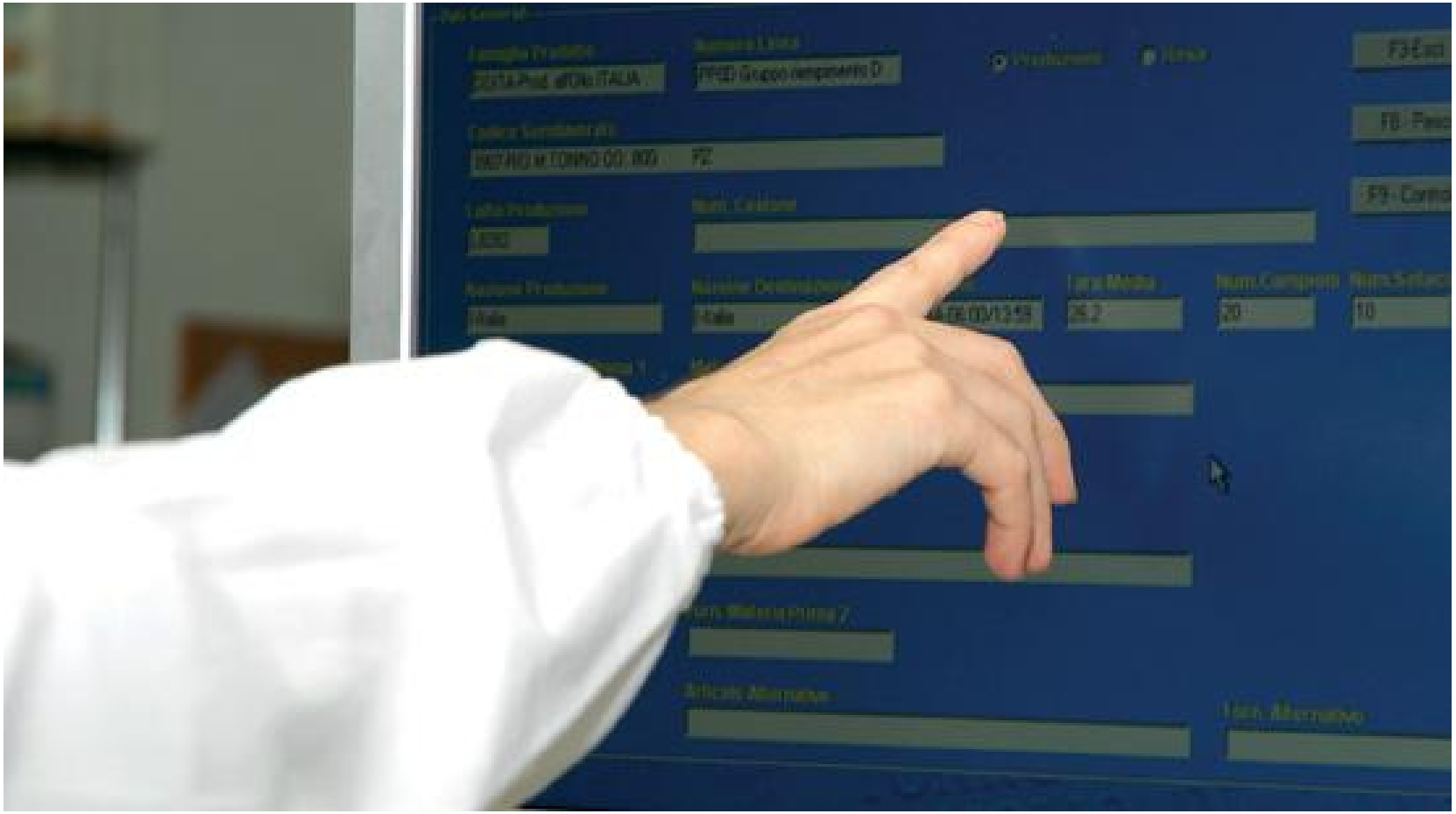
London Seafood Market @seafoodmatter

Main concerns of Retailers – Market (risks)

Integrity of the product:

- Where seafood was caught/harvest? (IUU, FAO, Sustainable sources)
- Is the seafood properly processed and canned/packed?(Thermal process, carbon dioxide, double seamming)
- Labor onboard, worker and working conditions (BSCI, ETI, SA8000)
- Is the information on the label sufficient? (avoid fraud, mislabelling)
- Reliable supplier and information.
- Certifications (Quality, Food Safety, Legal sourcing, Sustainability, Labor, ISO)

Traceability systems in the global markets

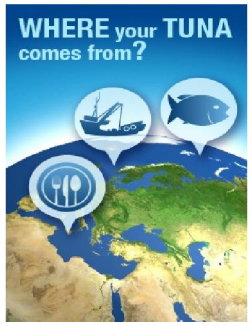


Traceability system in the seafood sector

United Kingdom

- John west; “can tracker”
- Track the tuna can to the Ocean and the boat
- Provide transparency, awareness of the story behind the can.

Italy



- Rio Mare; implement a sophisticated software
- Track the tuna can to boat, fishing date, fishing method, date of canning and quality.
- Weapon against illegal fishing

Canada

- Sobeys – “thisfish” (fresh seafood and frozen products). From the ocean to dinner plates coded and tracked
- Its origin, boat, crew , the Captain logbook.
- Fishermen are proud to be part of this traceability system, sustainability and Quality

Traceability system in the seafood sector

Ecuador

- A traceability platform to document the complete lifecycle of the shrimp from farm to fork.

Thailand

- A backbone seafood sustainable system. To trace from the pond that produced it – monitor the operations, actions and labor conditions of our suppliers to the plate.

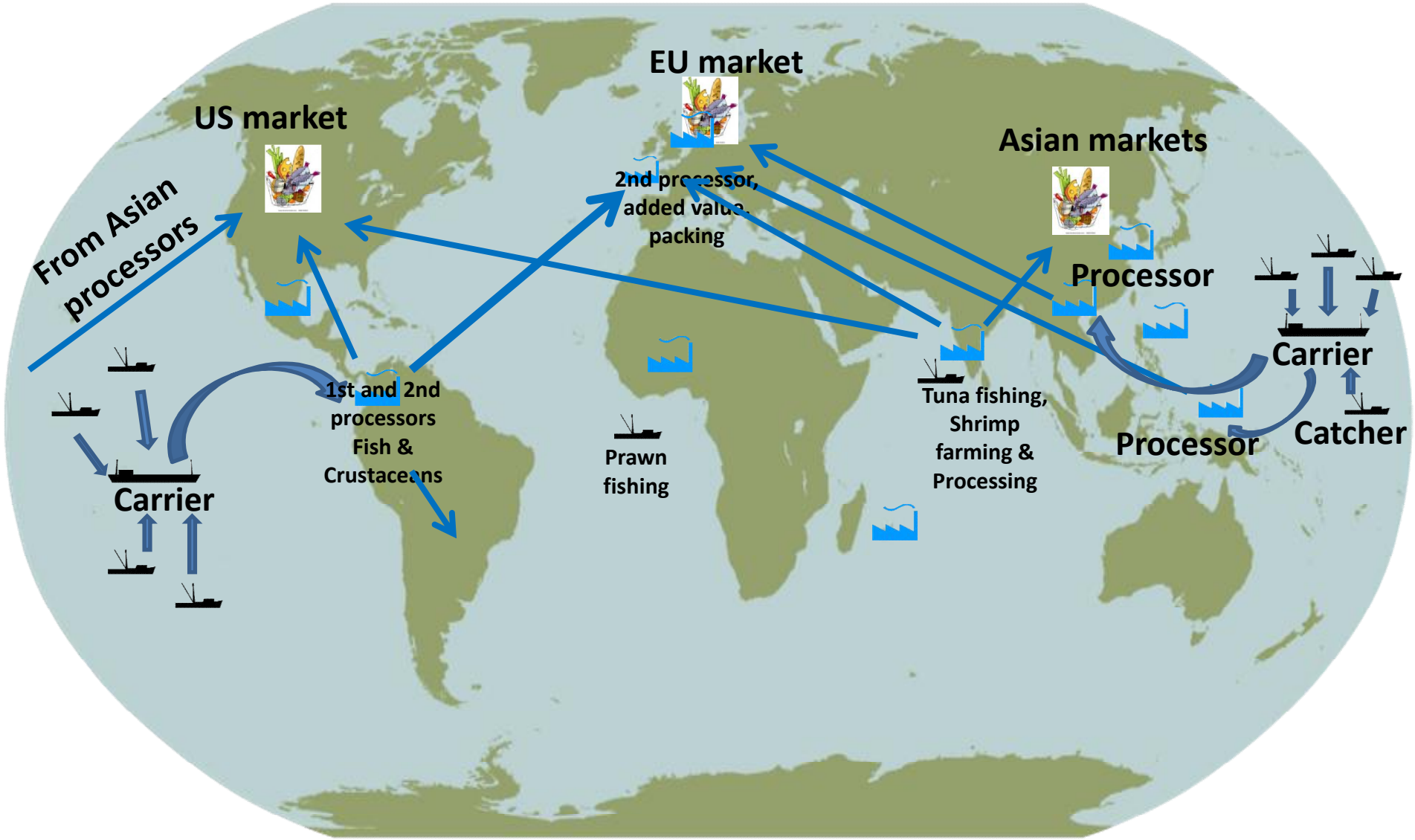
Global

- 63+ members, create a platform open seafood companies. To improve the traceability from end to end which it is a challenge due to for instance shrimp is a globalized commodity

Why do we need a traceability system ?

- Consumers can trust the seafood supply chain
- Producers; can manage quality and sanitary information and find out consumption pattern and consumer’s needs
- Logistics; documentation support.
- Governments; can track the origin of the tuna, food safety compliance / Transparent
- Others; can provide information about
- sustainability,
- quality,
- food safety,
- workers and working conditions.

Seafood supply chain: a specialized business



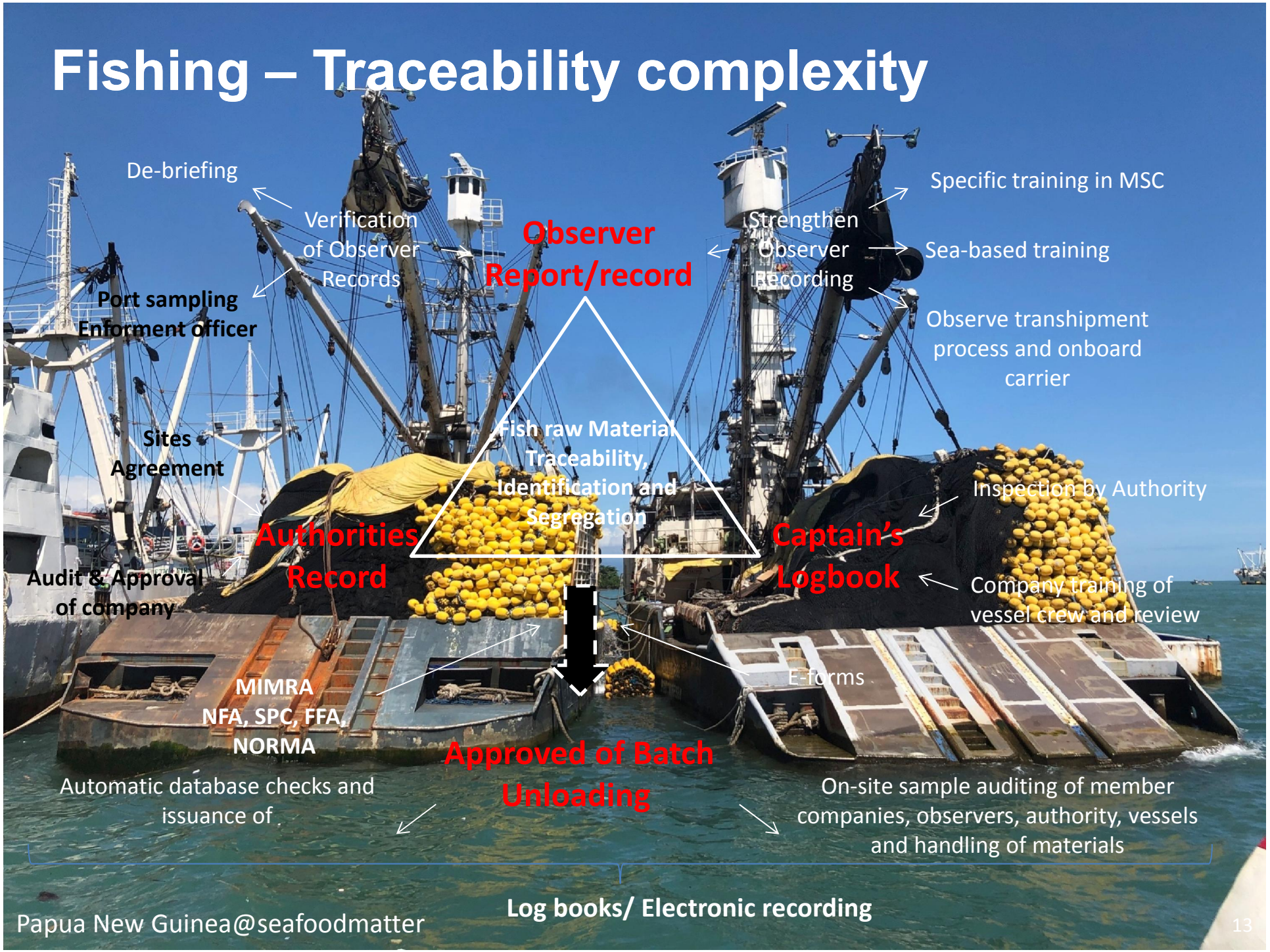
Seafood supply chain
Traceability typical model

***Hatchery – Feed – Farm – Transport – Reception (sorting, classification) – Processing (first) – FCL shipment - market**

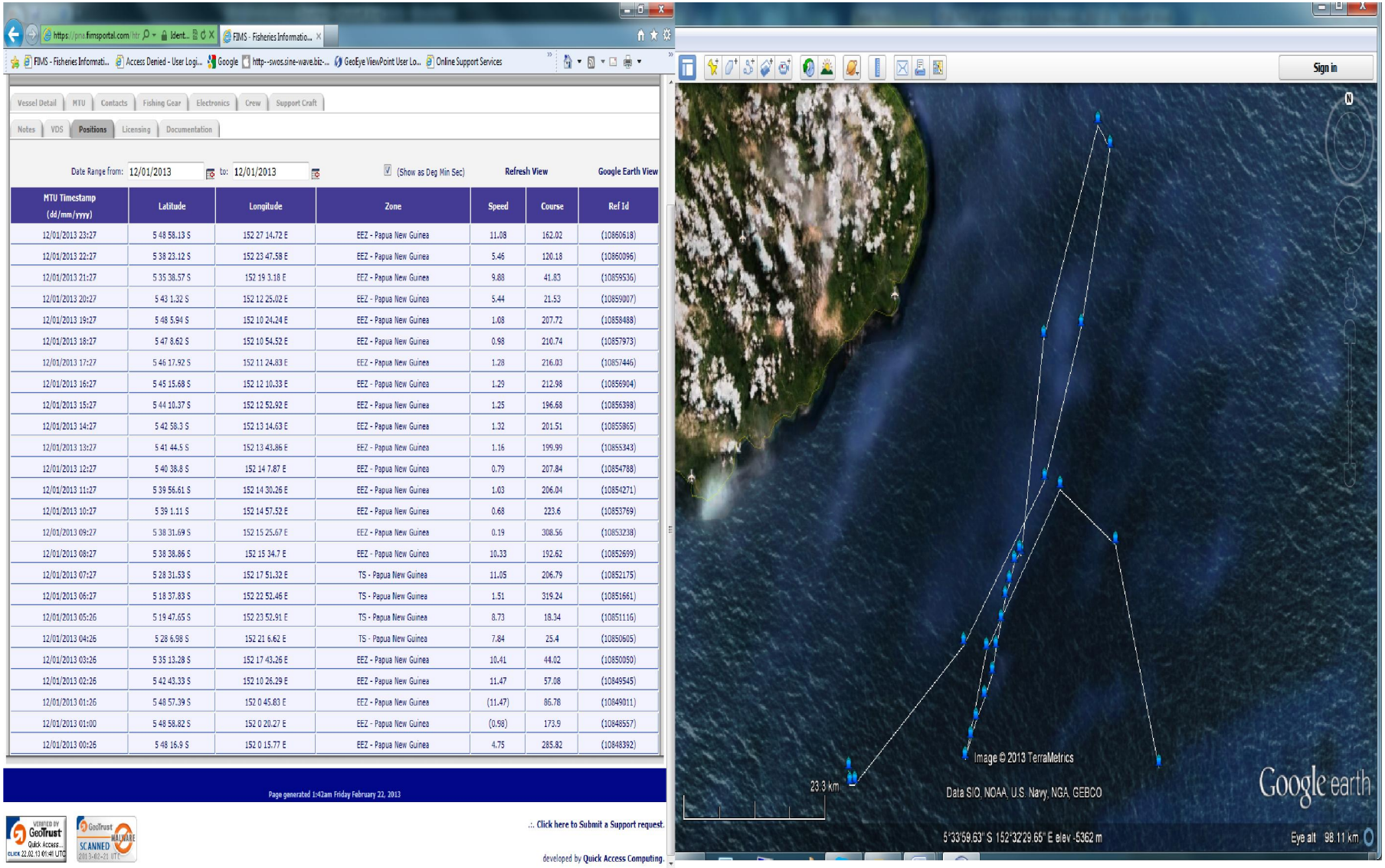
***Fishing ground – fishing boat – unloading – Reception (sorting by species, size, market) – processing (first) – shipment - processing (second) – transport - market**

- By who? (vessel ID, IUU, Hatchery/farm name,)
- Where? (IUU, Fishing area, harvest, complaince)
- When? (Closure period, catch quantity,harvest, transfer, date, and time)
- How? (Fishing method, Farm, Complaince)
- **In what quantity?** (Catch quantity, harvest, sorted at reception, complaince, CoC)

Fishing – Traceability complexity



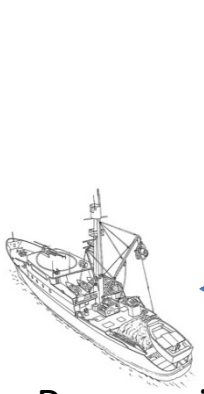
Global Fishing Watch source



Positional data from VMS + Google Earth Geographical location / 2013 MSC manager PNA

Verification and quality of data

FIMS provides technical support to Pacific Islands



Purse seiner

Other Vessels

Satellite

FADs

E-forms

Observers

Data Centre

FFA

SPC

PNA

Management Access

*ATS/VMS Access/Alerts for Vessels & FADs

*eForms and Catch Traceability

*Observer Management and Monitoring

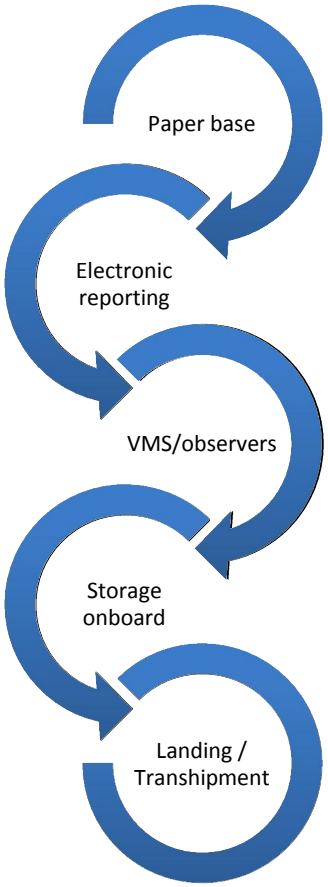
*Backup Replication of Data to local Server

Company Access

*VMS Access to Vessels and FADs owned

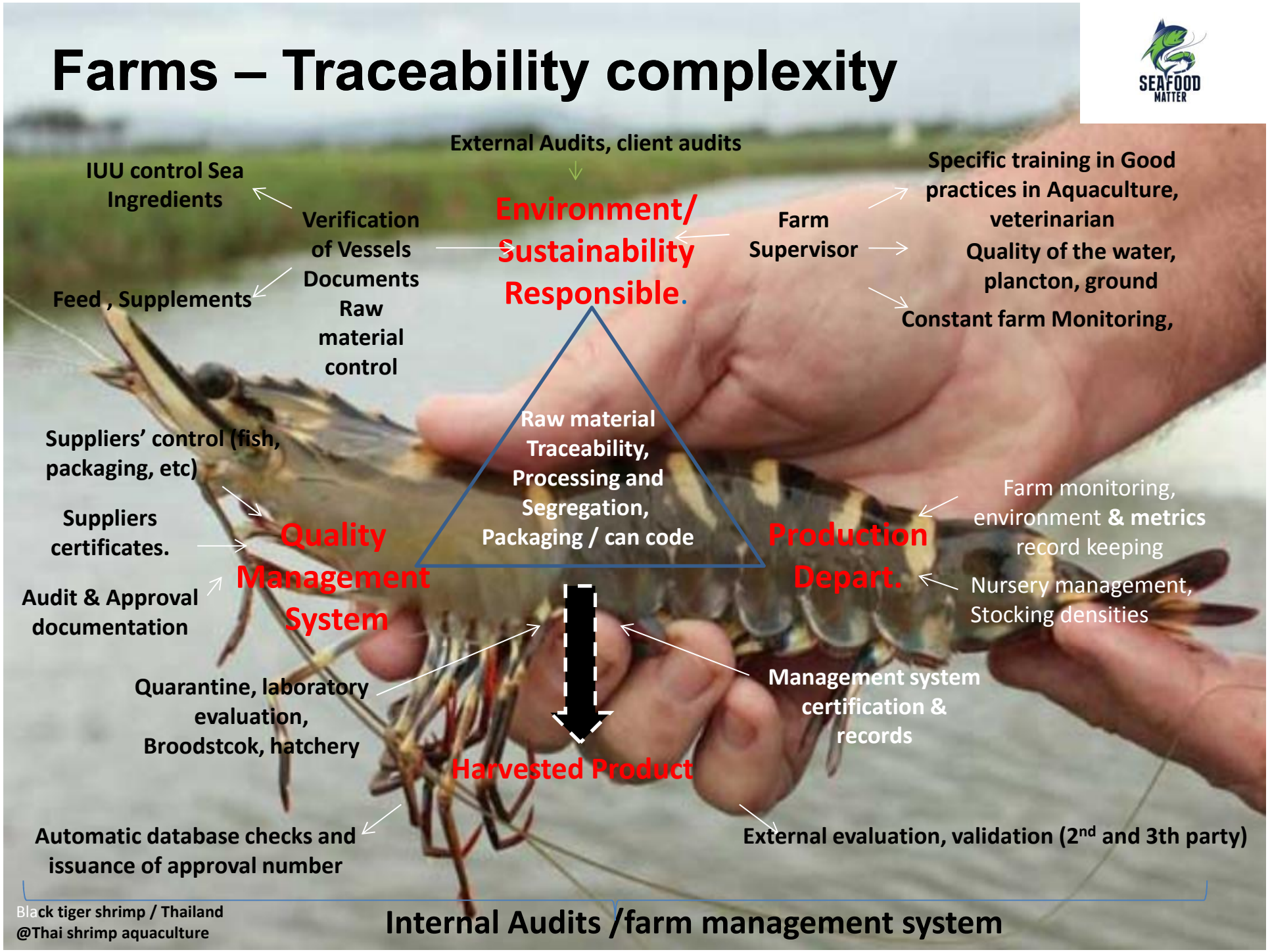
Fishing - Complexity & elements

Fleet: tuna, small pelagic
Gear: Trawler, Purse seiner, Longline, Pole & line
Government regulations
Markets request: client and buyers
Food safety
Environmental issues
Quality
Crew onboard welfare: workers
Segregation and Identification
Electronic date
VMS
Certifications (fishing license, SOLAS, UNCLOS)



Tuna fish local market in Male, Maldives@seafoodmatter

Farms – Traceability complexity

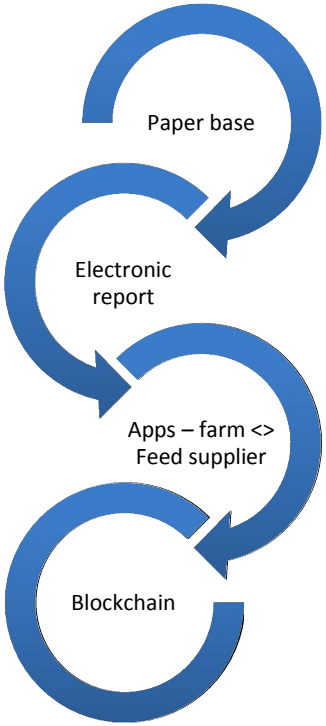


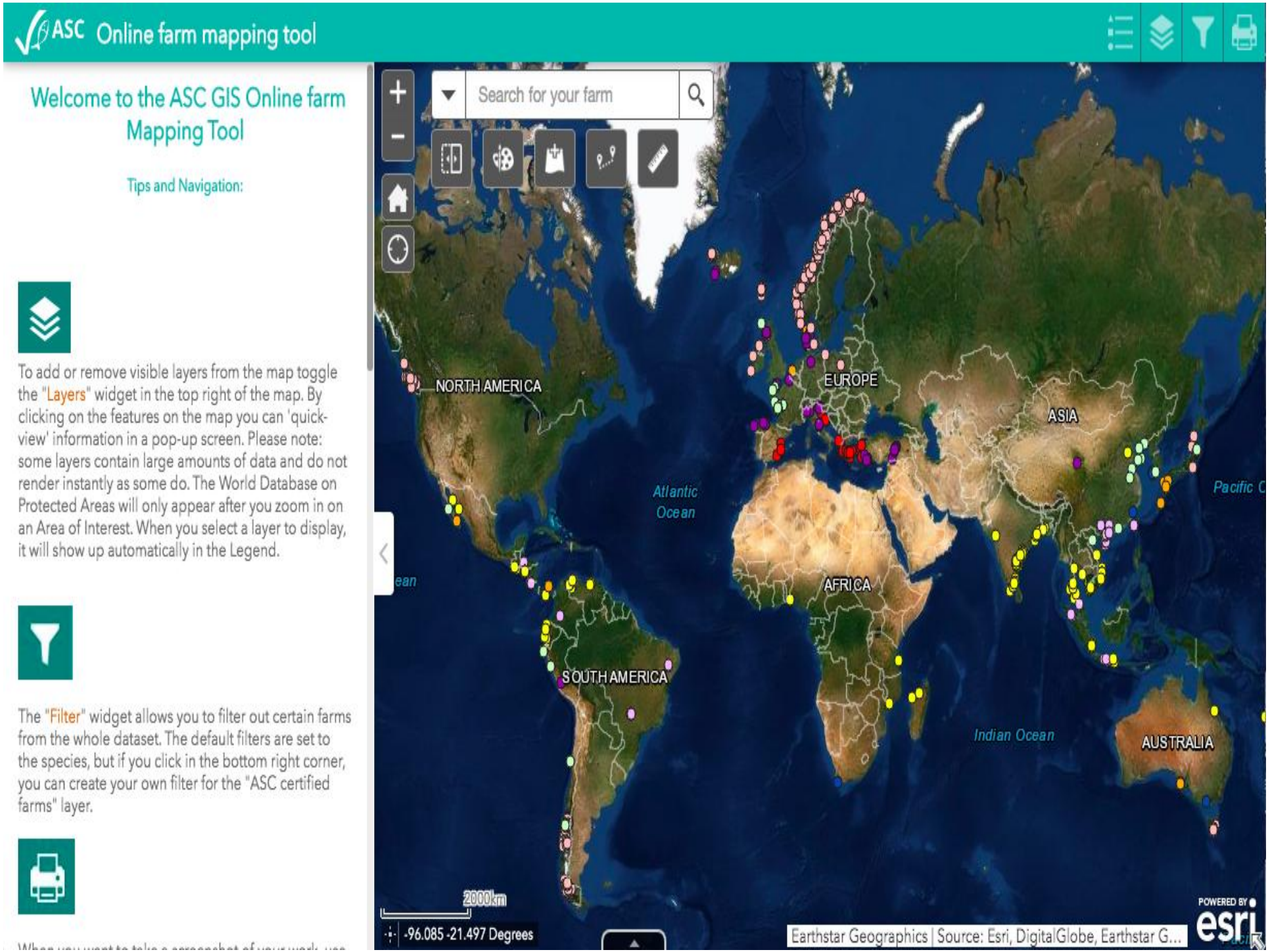
Black tiger shrimp / Thailand
@Thai shrimp aquaculture

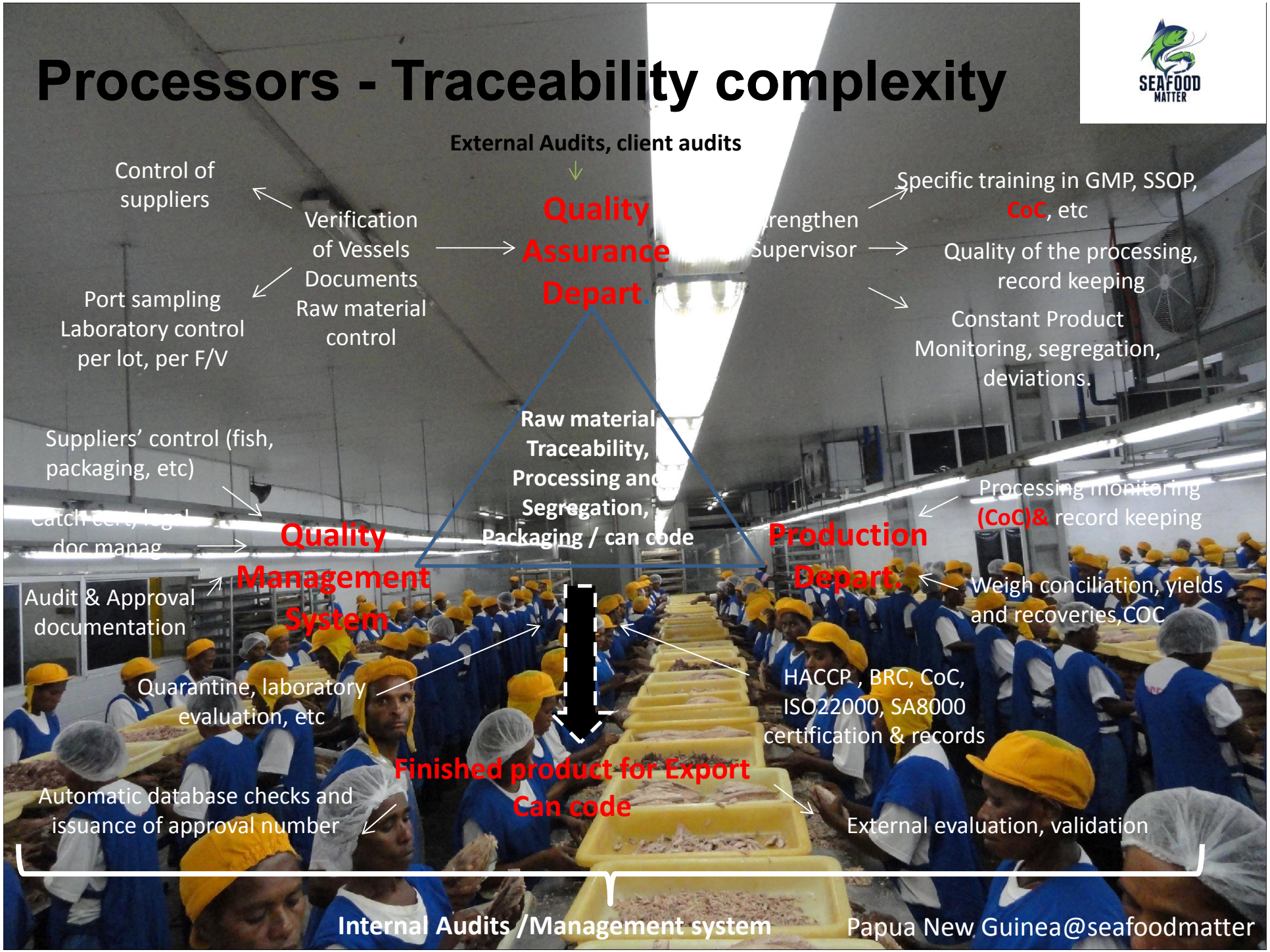
Farm - Complexity & elements

Size of the farm: single, multi or group
Government regulations
Markets request: client and buyers
Food safety
Environmental issues
Quality
Labor aspects: workers
Feed: feed ingredients
Broodstock sourcing
Hatchery information
Key Elements/ farm performance

Trout farm in Italy @seafoodmatter

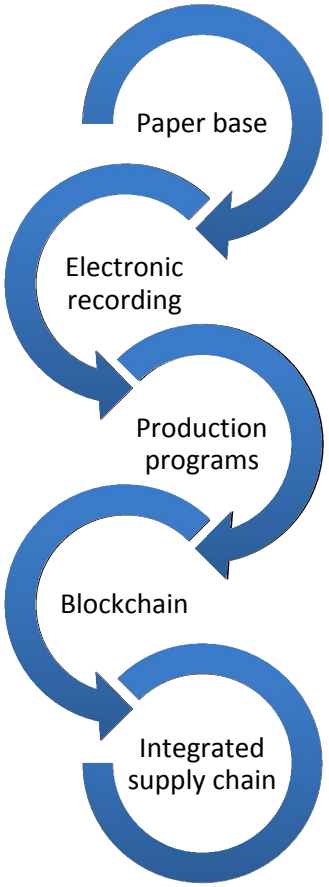



ASC Online farm mapping tool
Welcome to the ASC GIS Online farm Mapping Tool
Tips and Navigation:
To add or remove visible layers from the map toggle the "Layers" widget in the top right of the map. By clicking on the features on the map you can 'quick-view' information in a pop-up screen. Please note: some layers contain large amounts of data and do not render instantly as some do. The World Database on Protected Areas will only appear after you zoom in on an Area of Interest. When you select a layer to display, it will show up automatically in the Legend.
The "Filter" widget allows you to filter out certain farms from the whole dataset. The default filters are set to the species, but if you click in the bottom right corner, you can create your own filter for the "ASC certified farms" layer.
Search for your farm
NORTH AMERICA
EUROPE
ASIA
Atlantic Ocean
Pacific
AFRICA
SOUTH AMERICA
Indian Ocean
AUSTRALIA
2000km
-96.085 -21.497 Degrees
Earthstar Geographics | Source: Esri, DigitalGlobe, Earthstar G...
POWERED BY esri


Processors - Traceability complexity
External Audits, client audits
Control of suppliers
Verification of Vessels Documents Raw material control
Port sampling Laboratory control per lot, per F/V
Quality Assurance Depart.
rengthen Supervisor
Specific training in GMP, SSOP, CoC, etc
Quality of the processing, record keeping
Constant Product Monitoring, segregation, deviations.
Raw material Traceability, Processing and Segregation, Packaging / can code
Suppliers' control (fish, packaging, etc)
doc manag
Quality Management System
Audit & Approval documentation
Quarantine, laboratory evaluation, etc
Processing monitoring (CoC)& record keeping
Production Depart.
Weigh conciliation, yields and recoveries,COC
HACCP , BRC, CoC, ISO22000, SA8000 certification & records
Finished product for Export
Can code
Automatic database checks and issuance of approval number
External evaluation, validation
Internal Audits /Management system
Papua New Guinea@seafoodmatter

Processing - Complexity & elements

Type of processing: first, secondary, added value
Government regulations
Markets request: product's specifications
Food safety (chemical, microbiological, water, etc)
Environmental issues
Quality specifications
Labor aspects: workers
Feed: feed ingredients
Control of suppliers / qualifications
Recovery / Yields

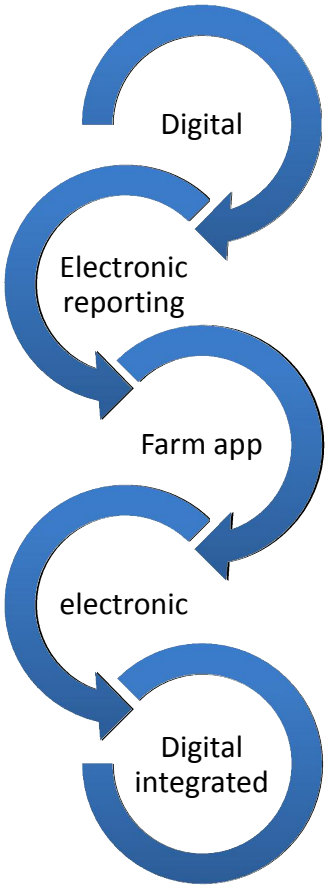


Market preferences on traceability

Shrimp farm in Nicaragua / Sampling @seafoodmatter

Full-chain traceability

- Protection of public health
- Improvement of products traded
- Reduce recall scope (batches, segregation)
- Reduce the risk of illegal, unregulated and unreported (IUU) fishing, human trafficking
- Increase consumer **trust**
- Quality assurance
- Reduction of brand risk – associated with no good labor practices (farms)/ onboard crew welfare
- Demonstrate / Improve sustainability practices



Take away

- *Seafood trading is a globalized business that needs high **transparency and accountability** when it comes to Seafood sourcing*

- *Traceability shall be built on existing industry practices and company records, build on existing international norms and government processes, and build on farm or fishing company systems, documents and records a robust and **reliable** traceability system.*

- ***To drive change - go to the next level**, make your traceability go digital/on-line and you will get a robust, highly reliable system, with a tremendous increase on the transparency level – brand leading - **trustful**!*

INDIA INTERNATIONAL SEAFOOD SHOW

THANK YOU !