



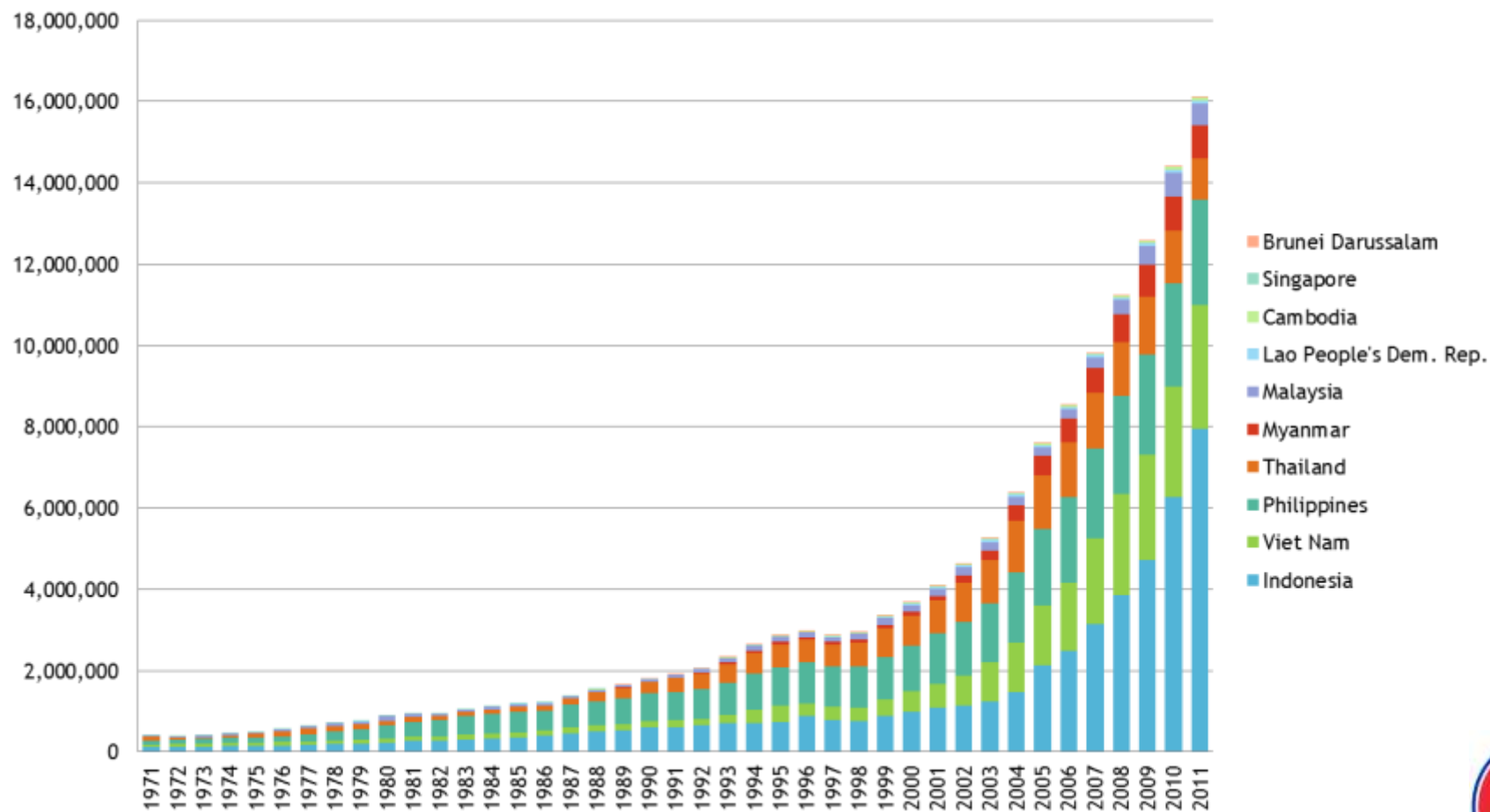
Aquaculture sector
by
Patrick White

**The 2nd Meeting of ASEAN Ad-hoc Taskforce on Developing New
Vision on Food, Agriculture and Forestry (ATF-FAF) towards 2025
18 July 2014, Bangkok**



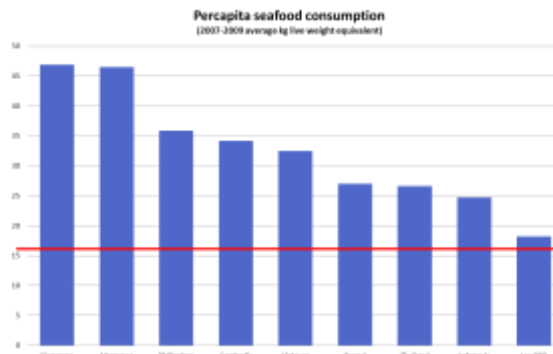
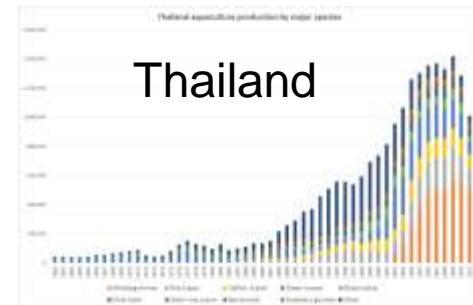
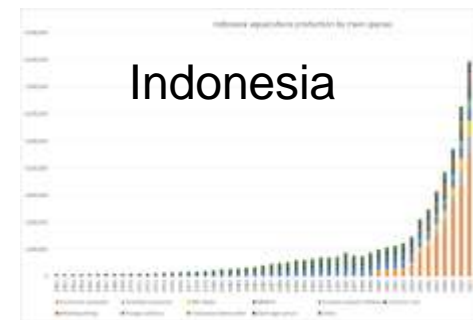
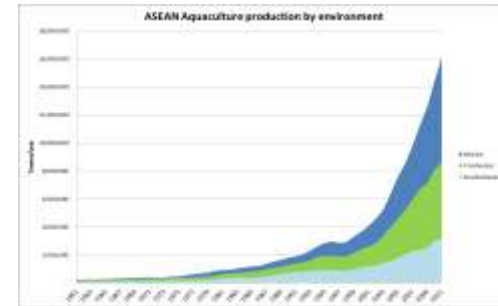
Aquaculture within AMS

ASEAN Aquaculture production by country (tonnes)



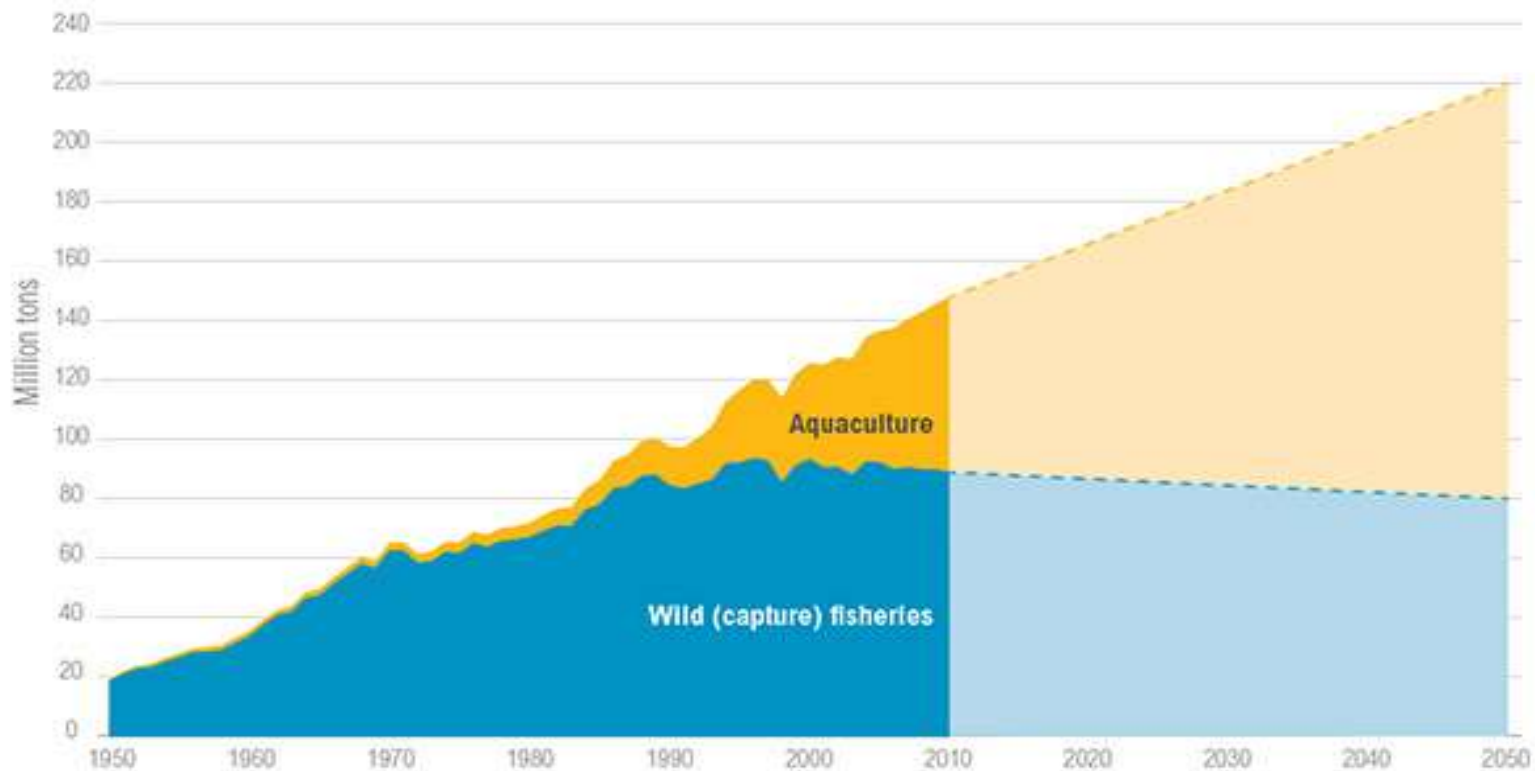
Introduction

- Aquaculture environment
 - Brackish water – slow growth
 - Freshwater – rapid growth
 - Marine – rapid growth
- Aquaculture development growth
 - Rapid growth – C, L, I, Ma, My, V
 - Maturing – B, P, S, T
- Seafood important in the diet



Increasing importance of Aquaculture

Aquaculture Is Expanding to Meet World Fish Demand



Source: Historical data 1950–2010: FAO. 2014. "FishStatJ." Rome: FAO. Projections 2011–2050: Calculated at WRI, assumes 10 percent reduction in wild fish catch between 2010 and 2050, and linear growth of aquaculture production at an additional 2 million tons per year between 2010 and 2050.

See www.wri.org/publication/improving-aquaculture for full paper.

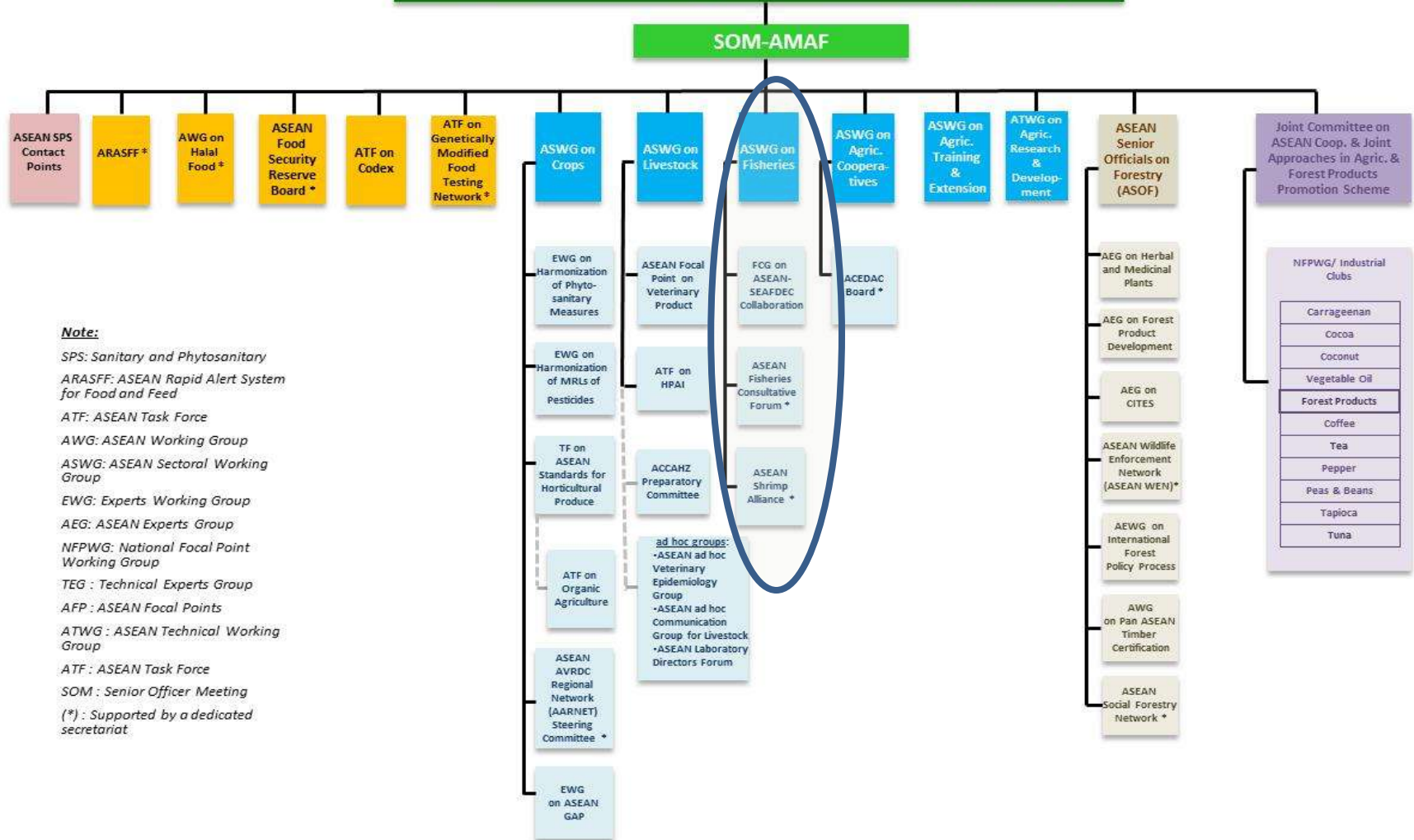
 WORLD RESOURCES INSTITUTE



Structure of ASEAN Cooperation in Food, Agriculture and Forestry

ASEAN Ministers of Agriculture and Forestry (AMAF)

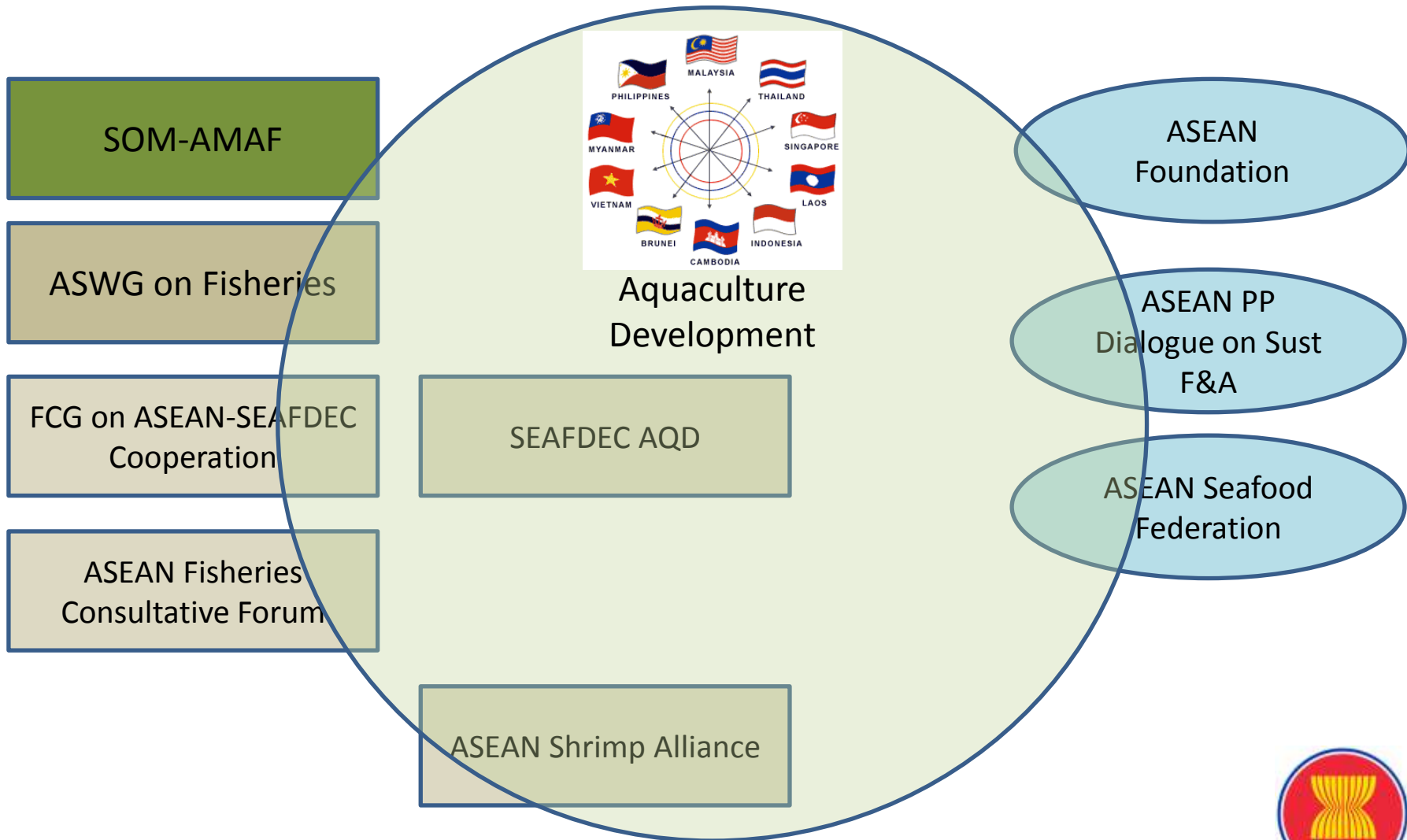
As of 19 February 2014



Note:

- SPS: Sanitary and Phytosanitary
- ARASFF: ASEAN Rapid Alert System for Food and Feed
- ATF: ASEAN Task Force
- AWG: ASEAN Working Group
- ASWG: ASEAN Sectoral Working Group
- EWG: Experts Working Group
- AEG: ASEAN Experts Group
- NFPWG: National Focal Point Working Group
- TEG: Technical Experts Group
- AFP: ASEAN Focal Points
- ATWG: ASEAN Technical Working Group
- ATF: ASEAN Task Force
- SOM: Senior Officer Meeting
- (*): Supported by a dedicated secretariat

Aquaculture within the ASEAN organisation



Main Issues, trends and challenges

- Resource use
 - Capture of seed, juveniles and broodstock
 - Use of fishmeal and fish oil for aquaculture feeds
 - Use of low-value fish as feed
 - Use of common resources (land, water)
- Environmental impacts
 - Aquaculture modification of physical habitat
 - Aquaculture escapees and their impacts on fisheries
 - Release of organic and inorganic nutrients into the environment
 - Diseases and parasites
 - Use of drugs and chemicals



Main Issues, trends and challenges

- Small scale aquaculture producers
 - Access to information
 - Access to credit
 - Markets and postharvest processes
- Climate Change
 - Fish ponds are very sensitive to CC
- Issues related to governance
 - Devolution
 - Environmental management



Recommendations

Completion of existing activities

- The first priority area is to complete the Action Plan activities that support the AEC Blueprints (2015) or carry over to new plan (2016-2020).
- This will require prioritisation and better formulation of the measures yet to be completed and better reporting on progress through the ASWGF.
- As human and financial resources are limited to achieve this, activities should be prioritised and links made to other possible supporting institutions and potential funding agencies to assist with the completion of the activities and tasks.



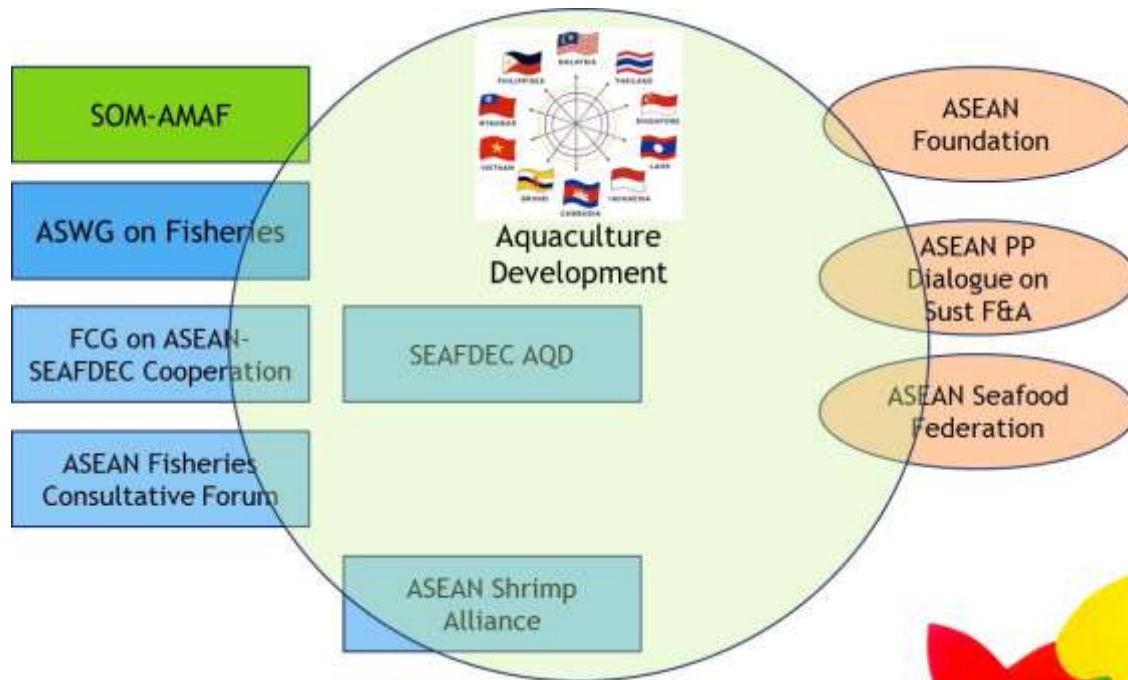
Supporting and cooperating Organisations

Funding

- GIZ
- Norad
- Danida
- Sida
- EU
- AusAID
- USAID

Coordinating

- FAO
- NACA
- APFIC
- MRC



* Scientific

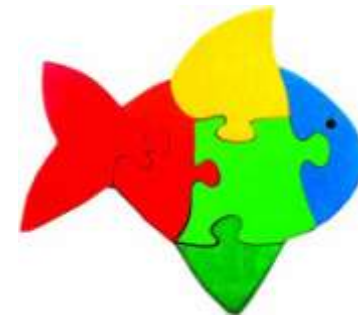
* Worldfish

* Other

* AIT

* Pemsea

* InfoFish



Aquaculture Plans and Activities

- Strategic Plan of Action on ASEAN Cooperation in Food, Agriculture and Forestry (FAF SPA)
 - ASEAN Fisheries integration policy ASIP (including aquaculture)
 - ASWGFi SPA
 - Plan of Action on sustainable Fisheries for food security for the ASEAN region towards 2020
 - ASEAN-SEAFDEC Alliance: Regional Plan of Action and Collaborative Projects
 - ASEAN Fisheries Consultative Forum (AFCF) workplan
 - ASEAN Public-Private Initiative for Sustainable Fisheries and Aquaculture

Streamline (prioritise) and consolidate plans and activities



Recommendations

Streamline the current aquaculture cooperative arrangements by

- Having one ASWGFi SPA (2016-2020) that relates to aquaculture under a FAF strategic plan (2016-2020) with clear roles and responsibilities for action, measurable outputs and regular reporting to ASWGFi on progress.
- Integrate SEAFDEC AQD more closely into the ASWGFi and utilise their capacity for undertaking projects and delivering outputs for the ASWGFi SPA (2016-2020).
- Within ASWGFi create a committee to coordinate and monitor cross cutting issues related to aquaculture and fisheries in the three ASEAN blueprints including Climate Change, Food Security and Bioenergy issues.



Recommendations

Necessary steps to make ASEAN Cooperation in fisheries more efficient

- Review the ASWGFi SPA (2016-2020) to prioritise key actions and activities and align the ASWGFi plan more closely to the FAF plan and the ASEAN Integrated Food Security Framework (AIFS) and Strategic Plan of Action (SPA-FS).
- Prepare a plan that can be undertaken within the time frame and formulate it using the logical framework that includes Clear activities, Objectively Verifiable Indicators and Means of Verification for assessing progress and completion against the SPA objectives.



Progress

- **Food safety**
 - Traceability
 - BMPs and Certification
 - Use of chemicals and medications
- **Good aquaculture Practice**
- **Research and Development**
 - Research
 - Technology development
- **Training and information**
- **Aquatic animal Health and Biosecurity**
 - Disease monitoring and reporting
 - Movement of live fish
 - Early Mortality syndrome



Part 2. Developing a strategic plan for ASEAN Aquaculture Sector (2016-2025) – New Vision

Suggested joint Fisheries and Aquaculture vision

"Promote the sustainable development of capture fisheries and aquaculture in the ASEAN region to enhance the contribution to food security, poverty alleviation and improvement of livelihoods of ASEAN people dependent on the harvesting, farming and marketing of fish and fish products, through responsible management and increased trade".



Part 2. Developing a strategic plan for ASEAN Aquaculture Sector (2016-2025) – New Vision

Aquaculture vision

"Sustainable and responsible ASEAN aquaculture providing rural livelihoods and employment, food security and trade that is economically viable especially for the SME producers, within the capacity of the aquatic ecosystem and with minimum conflict with other sectors and other users of the aquatic resources"



Progress towards integration

2000

2005

2010

2015

2020

2025

Trade related issues

Food safety

Disease control

Good Aq. Practice

Good Governance

(especially EAA, Planning, management, Environmental)

Targeted Assistance

(Countries, small-scale, emerging issues)

Innovation and R&D

ASEAN Aq. Research plan, coordination, cooperation

Harnessing exterior support

(Funding, Projects, Research)



Future priority areas for ASEAN Aquaculture (vision 2020)

- Harmonise Aquaculture Regulations and Governance
- Improve resource use and production efficiency
- Research and development
 - Research on key emerging issues
 - Coordinated Research programs.
- Improve technology development and transfer.
- Improve training and information
- Targeting areas with greater need
 - Targeting needs small-scale producers.
 - ASEAN Countries with less developed aquaculture.
- Enhancing collaboration with other agencies



Logical Framework **Bandar Seri Begawan Declaration**

Strategic Thrust/ Outputs	Activities	Key Performance Indicators	Timeline	Lead agency; other responsible agencies, Dialogue/ Development Partners
Strategic Goal 1: Good Aquaculture Governance for ASEAN Community <i>build on existing work</i> Good Governance to facilitate the continued rapid expansion of responsible and sustainable planning and management of Aquaculture in the ASEAN region using the Ecosystem Approach.				
Strategic Objective 1.1. Good and harmonised aquaculture Governance Develop good governance mechanisms it should covering legal, regulatory framework and enforcement. Planning, Management, monitoring, control, review. Harmonise these mechanisms between the ASEAN member countries.				
Strategic Objective 1.2. Implement the Ecosystem Approach for Aquaculture <i>Public consultation</i> Develop guidelines for the implementation of the Ecosystem Approach to Aquaculture Development adapted to ASEAN conditions, species and culture systems				
Strategic Objective 1.3. Responsible and sustainable Aquaculture Planning zonation, carrying capacity, EIA				
Strategic Goal 2: Target assistance to critical needs Target activities and assistance to those areas that have the most pressing needs and could have the most benefit.				
Strategic Objective 2.1. Target Countries with less developed aquaculture Target assistance to those ASEAN countries with less developed aquaculture such as Myanmar, Laos, Cambodia				
Strategic Objective 2.2. Target small scale producers Target assistance to small scale aquaculture producers who are the bulk of the aquaculture producers.				
Strategic Objective 2.3. Target Emerging Issues. Target assistance for the main emerging issues <i>addressing emerging global challenges</i>				

Logical Framework Bandar Seri Begawan Declaration

Strategic Thrust/ Outputs	Activities	Key Performance Indicators	Timeline	Lead agency; other responsible agencies, Dialogue/ Development Partners
Strategic Goal 3: Innovation and Research and Development				
Encourage cooperation and coordination of Scientific Research and technological development				
Strategic Objective 3.1. R&D Cooperation				
Facilitate Regional cooperation in aquaculture Research and Development. Identify and prioritize the essential research needs and ensure that research funding is targeted at improving the productivity and competitiveness of aquaculture. <p style="text-align: right; color: red;">synergy, consultation, coordination and coherence</p>				
Strategic Objective 3.2. R&D Coordination				
Document present aquaculture research programs in each member country. Undertake an aquaculture research needs analysis. Synthesise the data and identify duplication and gaps				
Strategic Goal 4: Harness benefits from other aquaculture institutions , dialogue and development partners. Harness synergies with other regional research and funding institutions which are able to help. <p style="text-align: right; color: red;">New Partners</p>				
Cross cutting Objective 4.1. Harness benefits from regional aquaculture institutions				
Harness synergies with other regional research institutions which are able to help.				
Cross cutting Objective 4.2. Harness benefits from regional and international funding agencies				
Harness synergies with other regional funding institutions which are able to help. <p style="text-align: right; color: red;">Dialogue Partners</p>				



Outcomes to SOM FAF

Emphasize the importance of Fisheries and Aquaculture

Fisheries

- Providing livelihoods to poor coastal communities and families who do not own land

Aquaculture

- Fastest growing livestock production sector. Provide future seafood demand.

Seafood production

- Seafood very important part of the ASEAN diet
- Large export earnings

**Need New Vision and activities 2016 – 2025
for Aquaculture distinct from Fisheries**



ASEAN COORDINATION MECHANISM IN FAF for cross-cutting issues

- Strengthen SOM AMAF and SOMHD collaboration and coordination with crosscutting issues through ASWGFi **regular participation and interactions**
- Establish and/or enhance mechanisms for follow-up and **monitoring, evaluation, and reporting** on the implementation of the various AMAF, FAF, AIFS Framework and the SPA-FS;
- Enhance greater involvement and engagement of specific **stakeholders from the private sector** in integrated activities among the sectors involved in cross cutting issues;



IMPLEMENTATION, MONITORING AND EVALUATION

- Implement the Strategic Thrusts through one unified and prioritised ASWGFⁱ SPA.
- Monitoring and Evaluation
 - against measurable outputs
 - regular and transparent reporting
 - Regular and independent evaluation
- Partnership and resource mobilization
- Harness coordinated support
 - Project funding from Dialogue Partners and Donor agencies
 - Research and development from regional research institutions



Thank you

