



**DRAFT**  
**REPORT OF THE TENTH MEETING OF ASEAN SHRIMP ALLIANCE**  
**22 June 2020, Virtually Meeting**

**I. INTRODUCTION**

1. The Tenth Meeting of ASEAN Shrimp Alliance (ASA) was organized on 22 June 2020 as a virtual meeting via BlueJeans Video Conferencing Application and was hosted by the Department of Fisheries, Ministry of Primary Resources and Tourism of Brunei Darussalam.

2. The Meeting was attended by representatives from the ASEAN Member States (AMSs), namely, Brunei Darussalam, the Kingdom of Cambodia, the Republic of Indonesia, the Republic of the Union of Myanmar, the Republic of the Philippines, Singapore, the Kingdom of Thailand, and the Socialist Republic of Viet Nam, as well as representatives from the Southeast Asian Fisheries Development Center (SEAFDEC), FAO Regional Office for Asia and the Pacific (FAO/RAP), Network of Aquaculture Centres in the Asia-Pacific (NACA) and INFOFISH. The List of Participants appears as **Annex 1**.

**II. OPENING OF THE MEETING**

3. The Chairperson, *Mr. Thaworn Jirasophonrak*, Deputy Director-General of Department of Fisheries of Thailand thanked all delegates for their kind cooperation to attend this ASA Meeting, which was conducted virtually in response to the need to execute social distancing to reduce the further spread of the Coronavirus Disease 2019 (COVID-19). He stated that although the COVID-19 outbreak situation may cause the delay in work, but it could not break strong determination and spirit of ASEAN. He specifically thanked Singapore, Lao PDR, Myanmar, and Malaysia for kind nomination of their respective country focal point following to the agreement made at the Ninth ASA Meeting. However, Thailand is still looking forward to responses from the other AMSs. He also stated that this ASA Meeting would provide a very good opportunity to revise a strategic action plan to advance its work under the changing situation and adapt it to the new normal. In this forum, the further discussion on the regional technical cooperation and other concerned issues could be discussed. He also thanked speakers from the FAO/RAP, NACA and INFOFISH that participated in the Meeting to share information on the current situation, production and marketing trends, and impact of the COVID-19 outbreaks on the ASEAN and global shrimp aquaculture. The COVID-19 pandemic is a massive challenge for the shrimp industry, but there are lessons learned from the previous crisis that AMSs can draw upon. He then declared the Meeting open. His Opening Remarks appear as **Annex 2**.

**III. ADOPTION OF THE AGENDA**

4. The Meeting adopted the Agenda, which was revised as appears as **Annex 3**.

#### **IV. REPORT OF STATUS AFTER THE 9<sup>TH</sup> ASA MEETING**

5. Thailand informed the Meeting that up to the present, the ASA has made progress in 2 areas, namely: 1) updating the contents of ASA Website and encouraging the AMSs were to share the recent information; and 2) nomination by Singapore, Lao PDR, Myanmar, Malaysia and Thailand of their ASA Focal Point to the ASA Secretariat. The presentation appears as **Annex 4**.

#### **V. CURRENT SITUATION, TREND, PRODUCTION, MARKETING AND IMPACT OF THE OUTBREAK OF COVID 19 IN RELATION WITH ASEAN AND GLOBAL SHRIMP AQUACULTURE**

6. The Aquaculture Officer of the FAO Regional Office for Asia and the Pacific (FAO/RAP), *Dr. Tipparat Pongthanapanich*, presented the status of ASEAN and global shrimp production and trade including the impacts of COVID-19. She delineated that the production of cultured shrimp increased during 1990 – 2018. The ASEAN cultured shrimp shared 23% of the total world shrimp production in 2018. Indonesia, Viet Nam, and Thailand are the major producers of cultured shrimp in ASEAN., The world's top exporters of shrimp are India, Ecuador, Viet Nam, Indonesia, Argentina, China and Thailand. She also elaborated that the COVID-19 affected shrimp production; a decrease of global shrimp production by 30-50% was predicted during 2020. In Asia, the early season's farming activities slowed down considerably with a lower density of stocks and delayed stockings of ponds in most producing countries. Export processing will be affected by raw material shortages and measures to combat the pandemic. The pandemic has affected shrimp demand in international and domestic trade since the beginning of 2020: the most celebrations and public gatherings were canceled. Although there have been significant increases in retail grocery sales and takeout delivery as the majority of the population had to stay at home, overall consumption has declined because of shut down of restaurant and catering trade worldwide. Considering the forecast of a global recession, rising unemployment, and subsequent fall in consumer disposable income, 2020 demand for shrimp will likely weaken significantly both in developed and developing markets. However, the domestic market will play an important role as shrimp producing countries with domestic sales opportunities would be able to cushion the impacts of their shrinking export trade. In view of the falling GDP worldwide, consumer demand for shrimp will be more price-sensitive compared with the previous years, even at lower supplies. Her presentation appears as **Annex 5**.

7. The Director-General of the Network of Aquaculture Centres in Asia-Pacific (NACA), *Dr. Jie Huang*, presented New challenges to shrimp aquaculture in Asia-Pacific. He explained the overview statistic of aquaculture productions of penaeid shrimps in NACA member countries and link to the affection of COVID-19 during the epidemic period. The country lockdown measure caused several consequences such as; significant losses of market demands for aquatic products; aquaculture products face severe backlogs and the prices have fallen sharply; Supply chains for aquaculture related commodities (seeds, feed, and additives) were also affected; the commodities face difficulty to be accessed by the industry; the prices of aquatic products have rebounded rapidly due to the rising demand in the aquatic markets and the lag in production and supply chain; and the low tide of production may continue due to the earlier decline in seedling, feed, and other services. Moreover, the risk of aquatic

diseases is also on the rise due to the hasty recovery and rapid growth of aquaculture production following the containment of COVID-19 outbreak, with the early absence of diagnostic services or inadequate biosecurity measures. All of these phenomena will subsequently impact on international trade of aquatic products. The mitigation of COVID-19 effects requires more strong coordination of global and regional organizations. He also clarified that SARS-CoV-2 (the cause of COVID-19 in humans) is not known to infect aquatic food animals nor contaminate aquatic products based on many scientific publications. It is confirmed that aquatic animals will not be infected with a vertebrate coronavirus. His presentation appears as **Annex 6**.

8. The Director from INFOFISH, *Ms. Shirlene Maria Anthonysamy*, presented the current situation, trend, production, marketing, and impact of COVID 19 concerning ASEAN and Global Shrimp aquaculture. She explained that according to FAO Globefish world trade is expected to fall by between 13% and 32% in 2020 as the COVID-19 pandemic disrupts normal economic activity and life around the world. The decline will likely exceed the trade slump brought on by the global financial crisis of 2008-2009. It is expected that the world trade will recovery in 2021 is equally uncertain, with outcomes depending largely on the duration of the outbreak and the effectiveness of the policy responses. The COVID-19 pandemic variously affects the global seafood trade, such as; seafood value chain disruptions; lower overall seafood production; export disruptions; seafood demand and supply imbalance; seafood price declines; and shift in consumer preference. The global shrimp production compared with 2018, the estimated global production of farmed marine shrimp increased by 17% to 4.45 million tons in 2019. Nearly 85% of global farmed shrimp harvests took place in the Asia-Pacific region, with increased production in China, India, and Indonesia. In 2019, there was 3.05 million MT of shrimp and prawn has entered into international trade. Although prices were lower than in 2018, there was little or negative import growth in the traditional markets USA, EU, and Japan. The main suppliers - India, Vietnam, Ecuador, China, Indonesia, Argentina, and Thailand. She underlined the situation with regard to the impact of COVID-19 in ASEAN countries and greater Asia. She also highlighted that due to movement control measures under the COVID-19 pandemic, there has been an increase in the usage of online platforms for seafood buying. While quoting Lazada Group CEO Pierre Poignant that "Covid-19 is a catalyst of digital transformation in Southeast Asia". she said online purchasing will be a trend that will stay. She added that it is catering the trend according to consumers demand is the way to go. Her presentation appears as **Annex 7**.

## **VI. REVIEW OF THE ASA'S IMPLEMENTATION, STRATEGIC ACTION PLAN AND ITS FUTURE DIRECTION**

9. Due to his prior commitment on other important task, *Mr. Thaworn Jirasoponrak* was unable to chair the Meeting until the last session. He therefore nominated *Dr. Chumnarn Pongsri*, Advisor to the Department of Fisheries (DoF) of Thailand to serve as the Chairperson of the Meeting.

10. Representative of the ASA Secretariat, *Dr. Suttinee Limthammahisorn* reiterated the five objectives of the ASEAN Shrimp Alliance's. The first is to share and exchange information of shrimp commodities relating to shrimp export toward the same direction of shrimp products development among ASEAN Countries through the

website. As this objective is still on-going through updating of information in the ASA website, this objective could be achieved through good collaboration of ASEAN members. The second objective is to encourage and improve the ASEAN Shrimp Standard via ASEAN-SEAFDEC Strategic Forum and/or Roadmap for Integration of Fisheries Sector under ASEAN Economic Integration; and to achieve this objective, the strategic plan on the development of ASEAN Shrimp Gap comprising five approaches was developed. The first three approaches; namely: 1) Development of Standard on ASEAN Good Aquaculture Practices for Shrimp Farming or ASEAN Shrimp GAP; 2) Development of National Shrimp GAP Programs (for some ASEAN Member States that shrimp production standard does not exist); and 3) the Alignment of national shrimp GAP programs with ASEAN Shrimp GAP, had already been completed. As for the fourth approach, the Establishment and/or Strengthening National Certification System for National Shrimp GAP is still ongoing. The development of ASEAN Shrimp GAP Certification System/Scheme international recognition will be done under the Expert Working Group on ASEAN GAqP.

11. The meeting agreed that activities relating to the review and recognition (including Certification Systems) of the ASEAN Shrimp GAP will be done under the Expert Working Group on ASEAN GAqP (EWG ASEAN GAqP) so as to streamline all aquaculture GAqP matters. Nonetheless, ASA could still continue to work on matters related to training and promotion which is the fifth approach under the development of the ASEAN Shrimp GAP which supports the EWG ASEAN GAqP.

12. At this point, the representative from Malaysia defined the alignment of the ASEAN GAP in Malaysia that Malaysia has already combined two ASEAN GAqP (shrimp and fish) in a one National Standard, MS 1998:2007 (First revision). The representative from Malaysia then suggested that ASEAN should combine both standards in one certification scheme. Furthermore, it was suggested for ASEC to establish a verification and certification body to oversee the implementation of the ASEAN GAqP within the ASEAN region.

13. The representative from the Philippines described the alignment of the ASEAN GAP in the Philippines. The Philippines has a general GAqP standard, and conducted the 1<sup>st</sup> Workshop on Good Aquaculture Practices in 2019. The Philippines also has specific GAqP for shrimp and crab, finfish, and seaweeds to address the concerns of each commodity. The Philippines then expressed the support to the establishment of verification and certification body to oversee the implementation of the ASEAN GAqP.

14. The representative from Indonesia informed the Meeting that Indonesia already adopt the ASEAN GAP and FAO Technical Guideline in the Indonesia GAP Standard. Indonesia also mention that had good acceptance from EU for their shrimp products for five consecutive years. Therefore, the ASEAN Shrimp GAP should be promoted to be recognized by importing countries.

15. The representative from the ASA Secretariat continued her presentation on the fifth approach, which is the Enhancement of awareness and knowledge of ASEAN Shrimp GAP through the promotion and training to increase awareness and knowledge of ASEAN Shrimp GAP by stakeholders within and outside of the ASEAN region. There are several activities to be undertaken under this approach such as promoting ASEAN

Shrimp GAP, sharing information to the ASA website, organizing regional training on ASEAN Shrimp GAP for AMSs, and relevant ASEAN private sectors, organizing seminars/exhibition on ASEAN Shrimp GAP. She also presented the draft of the strategic plan on the development and implementation of ASA which was developed in accordance to the objective No.3 to create strong mechanism among ASEAN to jointly prevent non-tariff trade barrier by shrimp importing countries and all NGOs.

16. For the objective No.4, the representative from the ASA Secretariat urged that the AMSs should develop proposals and recommendations for action in relation to common concern issues and collaborative actions by the members. In this regard, Thailand informed the meeting that Thailand would lead the development of the proposals on genetic improvement, feed, disease, smart farming, food safety, product traceability, shrimp product and international tariff. Thailand intends to develop two proposals, namely: 1) research on Genetic (ASEAN genetic improvement of marine economic shrimps for global industries); and 2) Regional Workshop on Traceability (ASEAN awareness building on implementing traceability system and aquaculture certification). The meeting noted Singapore's comments that Thailand's proposal should take note of existing developments such as the "Regional Guidelines on Traceability System for Aquaculture Products in the ASEAN Region" developed by SEAFDEC's MFRD Programme. Thailand's initiative, was welcomed by the representatives from Brunei Darussalam, Indonesia, Singapore, Myanmar, Malaysia and the Philippines.

17. According to the objective No.5 which was to joint coordinate and provide dialogue for communication to International forum, the representative from the ASA Secretariat explained that the AMSs should develop a Roadmap to promote Shrimp Production Certified with ASEAN Shrimp GAP in relevant events such as the International Seafood exposition, and dialogues with major international seafood importers.

18. After the discussion and deliberation, the Meeting agreed that the Strategic Plan for ASEAN Shrimp Alliance should be changed to the Plan of Action of ASEAN Shrimp Alliance, and suggestions made at this ASA Meeting should be incorporated in the draft Plan of Action, which would be circulated by the ASA Secretariat, for further input and consideration by the AMSs.

19. Lastly, Cambodia and the Philippines informed their ASA Focal Points to ASA Secretariat during the meeting, while Brunei Darussalam, Indonesia, and Vietnam undertook to inform its ASA Focal Point as soon as possible.

## **VII. CONCLUSION AND RECOMMENDATION OF THE TENTH ASA MEETING**

20. The Chairperson requested the ASA Secretariat to accommodate the suggestion from this ASA Meeting into the revised Plan of Action of ASEAN Shrimp Alliance and circulate the document to all AMSs by 8 July 2020. This is in order to provide AMSs sufficient time to review and provide their comments on the revised Plan of Action. The Meeting noted that if there is no further comment from the AMSs, the ASEC will consider that the Plan to be accepted by the AMSs.

21. The Chairperson then requested Cambodia, Brunei Darussalam, and Vietnam to submit the names of the Focal Points for the ASA to the ASEC as soon as possible.

22. The Meeting was informed that the 11<sup>th</sup> Meeting of the ASEAN Shrimp Alliance will be held in the Kingdom of Cambodia; however, the exact date and venue of the Meeting will be upon further consideration.

#### **VIII. ADOPTION OF THE REPORT**

23. The Meeting was informed that the report of the 10<sup>th</sup> ASA Meeting will be circulated *ad referendum* to the ASA Focal Points by 23 June 2020, and the AMSs are requested to provide comments and suggestions, if any, by 8.30 AM (GMT+8) of 24 June 2020.

#### **IX. CLOSING OF THE MEETING**

24. The Chairperson expressed his appreciation to all AMSs for their hard work undertaken so far in reviewing the Strategic Plan for ASEAN Shrimp Alliance (or Plan of Action of ASEAN Shrimp Alliance) which includes the roadmap to promote ASEAN Shrimp GAP in the international markets and the work program that complies with the objectives of ASA. He also thanked the representatives from regional/international organizations for their active participation and valuable information that would support ASEAN to move forward on ASEAN Shrimp GAP. He then expressed his special thanks to Brunei Darussalam for their supports that enable the Meeting to deliver outputs as expected. Finally, he expressed the hopes for all AMS representatives to stay safe and healthy under this COVID-19 outbreak situation.