

THE APPLICATION OF HACCP IN THE FISH PROCESSING INDUSTRY IN SOUTHEAST ASIA

2000 - 2003

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Brunel Darussalam • Cambodia • Indonesia • Lao PDR • Malaysia • Myanmar • Philippines • Singapore • Thailand • Vietnam



Marine Fisheries Research Department

THE APPLICATION OF HACCP IN THE FISH PROCESSING INDUSTRY IN SOUTHEAST ASIA

2000 - 2003

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Organised by : **Marine Fisheries Research Department (MFRD)**
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Southeast Asian Fisheries Development Center

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INTRODUCTION

Japanese Trust Fund Project on the Application of HACCP in the Fish Processing Industry in Southeast Asia, 2000 - 2003

At the 31st SEAFDEC Council Meeting in March 1999, it was proposed that a Japanese Trust Fund Project financed by the Fisheries Agency of Japan be established to support the programmes under the ASEAN-SEAFDEC Fisheries Consultative Group (FCG) collaborative mechanism. Under the Project's component on 'The promotion of the regional fisheries management', the MFRD proposed to conduct a 4-year programme from 2000 - 2003 on the application of HACCP in the fish processing industry in the S E Asia in view of the increasing importance and rapid development of HACCP application in the region. In line with international trends and the need to comply with the regulations of importing countries especially the EU and the US, the Hazard Analysis and Critical Control Point (HACCP) system has been endorsed for ensuring food safety in the ASEAN member countries. This programme was developed to assist ASEAN member countries (which now includes all S E Asian countries) further promote the implementation of HACCP in their fish processing industry not only for the export sector but also for the traditional fish products which are largely for the domestic market. The objective of the programme is to document HACCP application in the fish processing industry in the region and provide a useful platform for the sharing of information and experiences on HACCP application among the ASEAN member countries.

This programme is also in line with Resolution 14 and Plan of Action C4 endorsed by the ASEAN-SEAFDEC Conference on Sustainable Fisheries for Food Security in the New Millennium: 'Fish for the People' held on 24 Nov 2001 in Bangkok and as stated below:

Resolution 14: Improve post-harvest technologies to ensure fish quality assurance and safety management systems, which are appropriate for small and medium-sized enterprises in the Region, taking into account the importance of traditional fish products and food security requirements.

Plan of Action C4: Develop and apply fish quality and safety management systems that ensure food safety and support the competitive position of ASEAN fish products on world markets through the implementation, validation and verification of Hazard Analysis and Critical Control Point (HACCP) based systems and improved laboratory practices, and adapting quality and safety management systems so that they may be applied to small and medium enterprises in the ASEAN region.

Under the programme, the MFRD would conduct an annual series of regional workshops, which will be attended by the appointed country coordinators for the programme from each ASEAN member countries. A total of four regional workshops has been held with the inaugural 1st regional workshop in Singapore in 2000, the 2nd regional workshop in Ho Chi Minh City, Vietnam, in 2001, the 3rd regional workshop in Manila, Philippines and the 4th (final) regional workshop in Bangkok, Thailand in 2003. The reports of these workshops which include HACCP case studies in fish processing establishments in the respective countries (workshop venue) have been published and circulated.

In addition, a research activity on HACCP for fermented fish products in Myanmar was conducted by MFRD under the programme in response to Myanmar's request to SEAFDEC for technical assistance in fisheries post-harvest technology. The objective of the research activity was to assist the Department of Fisheries, Myanmar, develop HACCP plans for selected fermented fish products in Myanmar to help upgrade the traditional fish processing industry. In 2001, MFRD carried out the activity which involved two field study trips to Myanmar with technical support from Thailand in the form of a specialist in traditional fermented products. Product descriptions, production flow diagrams, Hazard Analysis and HACCP Plans have been developed for the following traditional Myanmar fermented fish products: Ngan-pya-ye (fish sauce) and Nga-pi (fish paste). In 2002, the activity assisted the Export Quality Control Laboratory, Department of Fisheries, Myanmar, which is the national laboratory supporting the implementation of the country's HACCP program, to upgrade its laboratory expertise through the attachment of two of the Laboratory's technical staff in MFRD to upgrade their analytical expertise in histamine and antibiotic residue testing using the HPLC equipment.

This publication is the final output of the 4-year programme and summarises the developments and progress made in HACCP application in all the Southeast Asian countries from 2000 - 2003. The publication includes a section on generic HACCP plans for selected traditional fish products of the region which are already being exported or have export potential. The publication is a definitive work highlighting to the importing countries the region's commitment to applying HACCP to ensure the safety of fish and fish products from the region.

BRUNEI DARUSSALAM

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INTRODUCTION

The fisheries industry in Brunei Darussalam has been identified as one of the sustainable industrial sectors that contribute to the country's economy. In 2002 alone, fisheries industry contributed BND\$ 67.9 million to the national Gross Domestic Product, of which a large portion was from the captured fisheries industry and the others from aquaculture and seafood processing industry.

The Department of Fisheries (DOF), under the Ministry of Industry and Primary Resources, is the competent agency responsible for the control of

import, export and transshipment for fresh and live fish products. DOF's primary concern is to ensure food safety, quality and compliance of product to the importing country requirements. DOF is also the competent agency that issues Health Certification, a pre-requisite requirement for the products to be exported to other country. This Health Certification is issued in the form of Letter of Attestation (LOA). Issued since 1998, this LOA is based on the Guidelines provided by Codex, as well as adhering to the specific requirements that of the importing countries concerned.

PRESENT STATUS OF FISH PROCESSING INDUSTRY

The fish processing industry in Brunei Darussalam consists of two broad categories, namely small and medium processing establishments. Small processing establishments make up the larger group, consisting of 49 out of the total 63 fish processing establishments. Products processed by these establishments include salted-dried fish, fish and prawn crackers, shrimp paste

and fermented fish products. Medium processing establishments process products such as frozen fish, prawn and crabs, canned fish and surimi-based products in commercial scale. Most of the fish products are domestically consumed. The number of fish processing establishments from 2000 to 2003 is listed in Table 1.

Table 1. Fish processing establishments, 2000 - 2003

| | 2000 | 2001 | 2002 | As in Jun 2003 |
|---|-----------|-----------|-----------|----------------|
| Small processing establishments | 63 | 49 | 42 | 49 |
| Medium-commercial processing establishments | 4 | 4 | 14 | 14 |
| Total | 67 | 53 | 56 | 63 |

Since 1997, Brunei has been exporting fisheries products to countries such as Hong Kong, Japan, Thailand, Malaysia and US. The quantity and value of seafood export is shown in Table 2.

Table 2. Export of seafood from 2000 - 2002

| | 2000 | | 2001 | | 2002 | |
|--------------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|
| | Quantity (tonnes) | Value (million BN\$) | Quantity (tonnes) | Value (million BN\$) | Quantity (tonnes) | Value (million BN\$) |
| Live, fresh, frozen fish | 7.1 | 0.33 | 4.49 | 0.21 | 1.52 | 0.1 |
| Fish meal | - | - | 333.1 | 0.13 | - | - |
| Shrimp | 58.8 | 0.71 | 128.15 | 1.5 | 100 | 1.2 |
| Total | 65.9 | 1.04 | 465.74 | 1.84 | 101.52 | 1.3 |

HACCP IMPLEMENTATION

The concept of HACCP is relatively new to Brunei. Nevertheless, the government recognise the importance of HACCP as the best tool currently available to achieving the quality and safety level required in food products. Various government efforts had been made to initiate the implementation of HACCP in the fish processing industries. This included HACCP awareness talks and seminars to various government officials and private sectors, consultative joint project between the fish processing establishments and technical assistance as provided by Promotion and Entrepreneurial Development Division (PED) under the Ministry of Industry and Primary Resources (MIPR).

Currently, MIPR is working toward fulfilling the 'HACCP Implementation Programme' with the assistance of SIRIM, QAS, Malaysia. Under this programme, two fish processing establishments are selected for the Product Certification programme, which include the implementation of Good Manufacturing Practices (GMP) and Sanitary Standard Operation Procedures (SSOP). To date, these two companies, Semaun Seafood Sdn. Bhd. and Tuah Maju Multifood Sdn. Bhd. (TMM) have been awarded and are in the process of implementing HACCP in their establishments.

PROBLEMS/ DIFFICULTIES ENCOUNTERED

As most of the fish processing establishments in Brunei are relatively small, and most of the products are domestically consumed, HACCP implementation is viewed by the industry to have only a minor impact. This leads to the slow pace of implementation of HACCP in Brunei. Some of the problems encountered are:

- Lack of understanding of HACCP by food processors
- Lack of education and extension on the part of fish handlers to reduce post harvest losses
- Lack of budget to develop the system
- Lack of trained manpower
- Lack of facilities and equipment for Inspection laboratories, fish landing, and fishing vessels
- Lack of qualified laboratory analysts to carry out analysis for the need of fish industries

FUTURE DIRECTIONS

To achieve the effective implementation of HACCP in the local fish processing establishments successfully, various programmes and activities need to be done:

- To provide better understanding on the importance of HACCP system to all fish processing establishments in order to produce better quality and safe products
- To assist the processing establishment in enhancing the safety and quality of their product by providing technical training on HACCP, Good Manufacturing Practices (GMP) and Good Hygiene Practices (GHP), hygiene and sanitation and other related subjects to various personnel
- To assist the processing industry in the application of HACCP in their production operation
- To have regular inspections carried out at the processing establishments in order to ensure compliance with the HACCP requirements
- To develop rules and regulations for quality management programme
- To provide a standardized inspection Laboratory with sufficient facilities and equipment to carry out laboratory analysis for the need of industries
- To train qualified laboratory analysts
- To seek regional collaboration and to participate in all the conference, training, meeting in all the quality assurance related matters

CONCLUSION

Although the implementation of HACCP in the seafood processing industry in Brunei Darussalam is going slowly (but steadily), its importance as the best tool currently available towards achieving the quality and safety levels required of food products produced has been increasing. The Department of Fisheries as the agency responsible for the development of the fisheries sector will continue and further enhance its primary

functions in planning and managing the fisheries resources, verifying and developing resource exploitation technology, providing technical support services, developing value added products, controlling and maintaining marine environment, and implementing safety and quality control programmes for seafood products.

CAMBODIA

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Cambodia

INTRODUCTION

Cambodia's fisheries sector encompasses extensive freshwater fisheries within floodplains, river and lakes; marine fisheries; rice field fishery and some aquaculture. Department of Fisheries (DOF) of the Ministry of Agriculture, Forestry and Fisheries is the competent agency responsible to manage all marine fisheries and inland water in the country, including mangrove forests.

The freshwater capture fisheries contribute more to national food security and economy than other fishery resources in Cambodia. The annual catch ranges between 290,000 - 430,000 tonnes (Table 1), which is the fourth largest in the world. Cambodia has a wide range of freshwater species. It has been reported that approximately 500 species are likely to be found in the Cambodian Mekong and Tonle Sap-Great Lake.

In 1960s the Cambodia's annual marine catch was around 40,000 tonnes. A Cambodia/ USSR study in 1980s reported that around 435 fish species from over 97 families were found in Cambodia marine water, with a total stock of around 50,000 tonnes/ year. Mackerel, Scad, Anchovy, Sardine, Tuna and Pomfret were identified as the most commercially

important pelagic fish species and Threadfin Bream, Croaker Big-Eyes, Lizard Hair-tail fish, Flat fish, Snapper, Barracuda, Grouper, Shark and Conger eel as the most important demersal fish species. Seven shrimp species, one squid species, and two cuttlefish species with a stock of about 1,300 tonnes/ year were also identified. By early 1980s the production has fallen drastically due to a number of interrelated factors, including decrease of population in urban areas, thus reducing private sector production and marketing arrangement. In 2002, the marine fisheries catch was 45,000 tonnes (Table 1).

Cambodia's aquaculture development, particularly small-scale aquaculture, is significant. Its production has increased from 1,600 tonnes in 1984 to 18,000 tonnes in 2002. Cage and pen culture production contribute more than 70% of the total aquaculture. The major cultured species in cage and pen system are *Pangasius hypophthalmus* (73%) followed by *Channa micropeltes* (21%). Other species cultured include *Puntius sp.*, *Clarias batrachus*, *Oxyeleotris marmorata*, *Cirrhinus sp.*, *Puntius altus* and *Leptobarbus hoevenii* which fishermen used to stock for a couple of months for fattening during abundant catches and sell it when fish were scarce.

Table 1. Cambodia's annual fish catch

| Type of fishery in Cambodia | Catch from 1994-2002 |
|--|---|
| | <u>Annual catch range (tonnes)</u> |
| <ul style="list-style-type: none"> • Large scale fisheries <ul style="list-style-type: none"> - Fishing lots ¹ - Dai (bag nets)² • Middle scale fisheries³ • Family fisheries³ • Rice field fisheries⁴ | 30,000 - 60,000 15,000 - 20,000 85,000- 100,000 115,00 - 140,000 45,000 - 110,000 |
| Total Inland Fish Catch | 290,000 - 430,000 |
| Including marine fisheries productions = 45,000 t | 335,000 - 475,000 |
| Including aquaculture productions = 18,000 t | 353,000 – 493,000 |

Source: DOF (1999/2002); Deap et al.(1998); and Ahmed et al. (1998)

¹Range reflects uncertainty in actual catch levels.

²Range shows approx. minimum and maximum value in 1994-1998.

³Based on socio-economic survey data extrapolated to entire country.

⁴Approx. 1.8 million ha (rice fields) x likely range of fish yields: 25-62 kg/ha.

Fish contributes to 75% of the total animal protein intake of the population. A well- managed fisheries sector is essential for the Royal Government of Cambodia (RGC) to meet its key goals of food security, poverty alleviation and national revenue generation in

the country. The monetary value of both marine and aquaculture production is around US\$ 250-300 million, which is approximately 8 - 10% of the total national GDP of US\$ 2,800 million.

FISH PROCESSING INDUSTRY

Though fresh fish is much preferred in Cambodia, a significant proportion of fish is processed for human and animal consumption. Most processed fish product is consumed domestically. A proportion of higher-quality, higher-value product is exported, mainly to Southeast Asia. The main species processed are freshwater and marine fish (dried, iced and frozen), followed by squid, octopus and beche-de-mer (FAO, 1993). FAO (1991) reported that about 60% of total fish were consumed fresh, 18% were fermented, 13% salted-dried, 5% smoked, 2% fish sauce and 2% other derived products.

Most of the fish are processed traditionally, e.g. sun-dried, salted-dried, smoked and steamed. The most significant traditional fish products are fermented fish and fish sauce. Traditional processing method utilizes a high volume of small fish (from inland fishery) and trash fish (from marine fishery) for human and animal consumption. The volume of processed fish for both local consumption and export can be seen in Table 2.

Table 2. Volume of processed freshwater and marine fish in Cambodia, 2001

| Product | Local consumption (tonnes) | % | Export (tonnes) | % | Total production (tonnes) |
|------------------------------|----------------------------|--------------|-----------------|--------------|---------------------------|
| Dried finfish | 3,032 | 57.80 | 2,214 | 42.20 | 5,246 |
| Dried shrimp | 277 | 66.11 | 142 | 33.89 | 419 |
| Dried squid/octopus | 25 | 3.37 | 717 | 96.63 | 742 |
| Smoked finfish | 512 | 65.06 | 275 | 34.94 | 787 |
| Steamed finfish | 458 | 100.00 | 0 | 0.00 | 458 |
| Fermented finfish | 1,257 | 43.83 | 1,611 | 56.17 | 2,868 |
| Paste | 7,187 | 56.68 | 5,494 | 43.32 | 12,681 |
| Crabmeat/ shrimp | 652 | 99.54 | 3 | 0.46 | 655 |
| Iced finfish | 0 | 0.00 | 4,941 | 100.00 | 4,941 |
| Frozen finfish | 0 | 0.00 | 230 | 100.00 | 230 |
| Frozen shrimp/ crab | 0 | 0.00 | 1,676 | 100.00 | 1,676 |
| Frozen squid/ octopus | 0 | 0.00 | 25 | 100.00 | 25 |
| Dried trash fish (fish feed) | 1,492 | 65.04 | 802 | 34.96 | 2,294 |
| Fish meal (fish feed) | 740 | 98.67 | 10 | 1.33 | 750 |
| Total | 15,632 | 46.29 | 18,140 | 53.71 | 33,772 |
| Fish sauce (litre) | 3,414,000 | 100.00 | 0 | 0.00 | 3,414,000 |

Source: Department of Fisheries Statistics (2002)

Freshwater and marine fish are processed by traditional and modern technology. Most of the traditionally processed fish are consumed

domestically, whereas the modern processed fish products are supplied for both domestic and export markets.

Traditional processing technology

The fisheries commodity produced by this traditional processing technology are normally supplied to domestic market, including those who are living within the country as well as outside the country. The traditional fish processing establishments are classified to small, medium and large scale.

Small-scale

The products processed in small-scale processing establishments include fish paste, fermented fish, fish sauce, sun-dried and salted-dried fish, smoked fish, and steamed fish. Small-scale processing establishments are generally household-based. The products are low-value and intended for family consumption.

Medium-scale

Like small-scale processing establishment, medium-scale establishments are also household-based, whose workers are generally household members, their relatives, and hired labours, particularly during peak period. The products are sun-dried and salted-dried, smoked, fermented and pasted fish. Sun-dried trash fish is exported to Vietnam. The fish products processed by medium-scale traditional establishments generally have lower value than those processed by large-scale establishments.

Large-scale

Large-scale processing establishments are generally located in fishing villages or nearby fishing lots. The number of workers ranges between 40 - 60, most of them are women. They are employed during peak season of fish catch from January-February to May-June. The products processed include salted-

dried fish, ordinary fish paste and high-value boneless fish paste. Thousand of tonnes of these products are annually produced from Tonle Sap-Great Lake, where fish are caught by middle scale and large-scale fishers. Fish sauce manufacturing is also part of large-scale processing establishments, providing jobs for about dozen of men in each enterprise.

Modern processing technology

In general, these fish products are produced for export to the international markets. The modern-processing establishments are run by local private companies and foreign-based companies. They are operated under supervision of the Department of Fisheries. There are three freezing plants in Cambodia, and these plants have export permits issued by Department of Fisheries. One plant is located in Phnom Penh and the other two in Sihanoukville.

Lian Heng Trading Company

This company has two processing plants, one in Phnom Penh and one in Sihanoukville.

1) Processing plant in Phnom Penh

It produces processed freshwater fish products intended for export to:

- US/Australia: Frozen fish and shrimp and smoked and salted-dried fish
- Singapore: Frozen freshwater fish.

In 2001, the plant exported 350 tonnes of processed fish products to the above countries, worth around US\$ 700,000. The company is unable to export to the EU yet.

2) Processing plant in Sihanoukville

The main investors of this company are Hong Kong and Taiwan-based companies. In 2001, the plant exported 300 tonnes product, worth US\$ 900,000. All products were exported to two respective buyers in Hong Kong and Taiwan. They were frozen shrimp, frozen squid, and stuffed crabmeat.

Sun Wah Fisheries Co., Ltd. (in Sihanoukville)

Established in Aug 1996, this company's major investor is a large Hong Kong company called SUN WAH. It is a medium-scale operation with a daily capacity of 10 tonnes of raw materials.

In 2002, the plant exported over 450 tonnes of processed fishery products mainly to its parent company in Hong Kong. Some products were then re-exported to other international destination markets.

SUN WAH is the highest quality seafood processing plant in Cambodia. This company has been authorized from the top government management to run the business successfully in Cambodia.

Marketing and distribution of fish products

The distribution and marketing of fish products are done by private sector. The marketing and distribution networks of freshwater fish and fish products are well developed, unlike its marine counterpart. A wide range of freshwater and marine fisheries products

is exported regularly. There is, however, no reliable correspondent data for value of production, value of export or destination of export. These issues should be addressed as a matter of urgency in the context of strengthening fisheries/aquaculture data collection.

Domestic markets

There is high demand for fish and fish products in the domestic market (Table 2). The most important products marketed and distributed are freshwater finfish and their traditionally processed derivatives. A small quantity of freshwater shrimps and bivalves are also sold. In marine areas many residents are self-sufficient, in term of fish production. High value species are usually sold to traders in Phnom Penh for export. Only 20-40% of the total small-scale freshwater aquaculture production (Tilapia, Common Carp, Chinese Carps, and Indian Carps) is sold directly at farm for local consumption.

The domestic market for marine products is relatively small. Consumption of marine species by Cambodians is generally restricted to marine areas.

The freshwater fish products are distributed in a few different ways. In many locations around the Great Lake and along river systems, fish are sold to consumers at the 'farm gate'. This method is especially applicable for small-scale processors of traditional products who target for domestic sale. In other cases, fish is transported by ox-cart, motorbike and small trucks to urban markets. In addition, cages are towed to Phnom Penh from the Great Lake region, hence fish distribution systems decline with increasing distance from the inland water.

In the marketing system for the freshwater fisheries, the main persons involved are fishermen, wholesalers/ middlemen and retailers.

- The fishermen are the workers that do fishing, either in small, medium or large scale
- The wholesalers/ middlemen are the marketers and providers who lend capital to most of the fishermen to buy and collect fish from small, medium and large-scale fishing operators, and then they sell fish to retailer
- The retailers are those that sell fish directly to the consumers

The place for fish landing, selling, and the key contacted place between lot owners, fishermen, middlemen and buyers are called the landing place. Generally, both fishermen and all types of buyers gather here.

The domestic distribution of marine species is poorly developed, and is limited to fresh or frozen high-valued species (e.g. shrimp, seabass, grouper and bech-de-mer). The marketing and distribution are primarily restricted to Phnom Penh.

Export markets

Around 24,150 tonnes of freshwater and marine fish (Table 3) and 18,140 tonnes of fishery products (Table 2) were exported in 2001. Table 3 listed the species exported and their export volumes.

The actual exports can be higher than the listed figures as collusion is a common practice at the border of Cambodia-Thailand/ Vietnam. For instance, freshwater fish and fishery products collected from Battambang, Siem Reap, Pursat, Kampong Thom and Kampong Chhnang provinces have been exported to Thailand, while reported to be collected from Kampong Cham, Kandal, Takeo, Prey Veng provinces, Phnom Penh and Vietnam. A substantial quantity of marine fish and fishery products, mainly high-value finfish, shrimp, and cephalopods that is exported to Thailand and Vietnam is possibly underestimated.

The main export destinations of fish and fishery products are Thailand and Vietnam. Others are Asian markets, such as Singapore, Malaysia, Hong Kong, China, Japan, and USA and Australia (Table 4). Cambodia has yet to have the European Union Commission's approval to export fish and fishery products to the EU markets.

Table 3. Volume and species of fresh inland and marine fish exported (DOF, 2001)

| No | Common Name | Scientific Name | Cambodian Name | Volume (tonnes) |
|-----|--|---|---------------------------------------|-----------------|
| 1. | Sand gobi | <i>Oxyeleotris marmoratus</i> | Trey Domrey | 384 |
| 2. | Oriental flat head lobster/ Matis shrimp | <i>Thenus orientalis/ Oratosquilla nepa</i> | Bangkang Pak/ Bangkang Kandobses | 69 |
| 3. | Pomfret | <i>Formio nigo/ Parastromateus nigo</i> | Trey Chap | 10 |
| 4. | Grouper | <i>Serranidae</i> | Trey Teker | 66 |
| 5. | Snakehead | <i>Channa micropeltes/ striatus</i> | Trey Ros/ Chdor | 3,778 |
| 6. | Clariid catfish | <i>Clarias macrocephalus/ batrachus</i> | Trey Andeng | NA |
| 7. | Soldier river barb | <i>Cyclocheilichthys enoplos</i> | Trey Chkaok | NA |
| 8. | Black Ear catfish/ Pangasiid catfish | <i>Pangasius larnaudi/ Pangasius hypophthalmus/bocourti</i> | Trey Po/ Trey Pra | 230 |
| 9. | Frog | - | Kangkeb | 15 |
| 10. | Tiger shrimp | <i>P. monodom</i> | Bangkear Khlar | 260 |
| 11. | Freshwater eels | <i>Honopterus albus</i> | Antong Teksap | 43 |
| 12. | Mud crab | <i>Scylla serrata</i> | Kdam Thmor Khieu | 49 |
| 13. | Water Snake | - | Pours Tek | 19 |
| 14. | Snail, clam, blood cockles | <i>Mollusks</i> | Khayomg, Leas, Khchao, Kreng Cheam | NA |
| 15. | Freshwater hard/ soft-shelled turtle | - | Andak/kantheay | 12 |
| 16. | Asian bony tongue/ Boxfishes | <i>Ostracronidae</i> | Trey Tapot | NA |
| 17. | Great white sheatfish | <i>Wallagonia attu</i> | Trey Sanday | 26 |
| 18. | Featherback | <i>Chitala lopus</i> | Trey Kray | 409 |
| 19. | | - | Trey Khaya | 11 |
| 20. | | <i>Notopterus notopterus</i> | Trey Slart | 25 |
| 21. | White lady carp | <i>Thynnichthys thynnoides</i> | Trey Linh | 150 |
| 23. | Peacock eel | <i>Macrognathus siamensis</i> | Trey Chlonh | 10 |
| 24. | Sheatfish | <i>Micronema</i> | Trey Kes | 9,796 |
| 25. | Baby crocodile | | Koun Krapeur | 25,000* |
| 26. | Ornamental fish | | Trey Lum Or | NA |
| 27. | Other species | | | 8,788 |
| | Total | | | 24,150 |

Source: DOF Fisheries Statistic (2001)

* Exported to Thailand, China and Vietnam

Table 4. Imports of fisheries and fishery products from Cambodia into selected markets, 1998 - 2001

| Importing country | Quantity (tonnes) | Value (US\$) |
|-------------------|-------------------|--------------|
| Hong Kong (1999) | 648 | 6,137,820 |
| Malaysia (1998) | 173 | 2,632,849 |
| Vietnam (2001) | 233 | 188,889 |
| Thailand (1999) | 3,342 | 1,224,989 |
| US (1999) | 280 | 1,063,464 |
| Singapore (1999) | 108 | 1,000 |
| China (2001) | 153 | 962,305 |

Source: INFOFISH/ Cambodian DOF Fisheries Statistics (1999-2001)

STATUS OF HACCP IMPLEMENTATION

The HACCP implementation in fish processing industry in Cambodia is relatively slow. DOF is still in the process of preparing HACCP regulations. The implementation of HACCP in the fish processing industry in Cambodia is currently on a voluntary basis. No HACCP has been widely introduced into fish processing industry yet.

One export-oriented plant (Lian Heng) applied for HACCP for export-purpose to US in 1996. The FDA

approved and agreed in 1998 to allow the fish products to be exported to the US after a group of experts from the US made a direct observation to the plant site and recommended what should be done to meet the requirements of HACCP.

Regarding to EU market, Department of Fisheries of Cambodia is now under the process of drafting processing regulations to meet the EU's requirements.

DIFFICULTIES ENCOUNTERED

The difficulties in implementing HACCP are as follow:

- Lack of HACCP knowledge as well as technical knowledge on food safety hazards and their control

- Lack of understanding in HACCP implementation
- Inadequate number of qualified personnel
- No proper laboratory available
- Legislation is not strong enough to enforce HACCP implementation

STRATEGIES AND POLICY FOR IMPROVING HACCP IMPLEMENTATION

- Training on HACCP plan development for small-scale, middle-scale and large scale processors and stakeholders
- Training of personnel in the industry, government and academia in HACCP principles and applications, and increasing awareness of consumers
- Training on internal audit of HACCP programs
- Training on rapid tests/assessment of hazards
- Developing specific training to support a HACCP plan, working instructions and procedures
- Developing cooperation among primary producers, industry, trade groups, consumer organizations and responsible authorities
- Maintaining an effective plant hygiene and sanitation program
- Study tours, fellowships, exchange visits
- Joint training and control authorities to encourage and maintain a continuous dialogue and create a climate of understanding in the practical application of HACCP

CONCLUSIONS

In order to export the fish products to overseas markets, especially EU, food safety and quality assurance are very important. The DOF is encouraging the application of HACCP system in fish processing

plants, both small to medium scale and large scale. However, DOF would need to set up inspection facilities and to establish regulations for application of HACCP, GMP and SSOP in processing plants.

INDONESIA

Setia Mangunsong

Director

Fish Inspection and Processing Development

Department of Marine Affairs and Fisheries

Indonesia

INTRODUCTION

Consisting of a total of 17,500 islands with a coastal length of about 81,000 km, Indonesia has land areas of over 2 million square km and 5.8 million square km of marine waters. Of this, 3.1 million square km is classified as archipelago and territorial waters. The remaining 2.7 million square km is Indonesia's Exclusive Economic Zone (EEZ). About 775,000 sq. km of marine waters are coastal areas of less than 200 meters deep.

With this vast area of inland, coastal and marine

waters, fisheries have been playing an important role in the socio-economic life of Indonesia, in particular in coastal communities. The sector provides employment for more than 4.5 million fishermen/ fish farmers. Currently, while most sectors suffer from the current economic crisis, fisheries have demonstrated its ability to sustain contribution to national economy. In 2000, fisheries generated about US\$ 1.675 billion from more than 500,000 metric tonnes total fish export and in 2002, US\$ 1.7 billion from more than 600,000 metric tonnes.

Production trends

The fish landing, both marine and cultured, has been increasing consistently from 1996 to 2000. The production in 1996 was 4,452,258 tonnes and in 2000,

4,875,649 tonnes. The average increase is around 3.51% per year. Table 1 shows the fisheries production by sub sector of fisheries, from 1996 to 2000.

Table 1. Fisheries production by sub sector of fishery, 1996-2000

Unit: 1000 tonnes

| Sub Sector | 1996 | 1997 | 1998 | 1999 | 2000 | Annual rate of increase (%) |
|---------------------|------------------|------------------|------------------|------------------|------------------|-----------------------------|
| Total | 4,452.258 | 4,579.766 | 4,642.209 | 4,893.060 | 4,875.649 | 2.31 |
| Marine fishery | 3,383.456 | 3,612.961 | 3,723.746 | 3,682.444 | 3,807.191 | 3.03 |
| Inland fishery | 1,068.802 | 966.805 | 918.463 | 1,210.616 | 1,068.458 | 1.38 |
| - Inland open water | 335.707 | 304.258 | 288.666 | 327.627 | 305.212 | -1.96 |
| - Culture | 733.095 | 662.547 | 629.797 | 882.989 | 763.246 | 3.02 |
| - Brackish water | 404.335 | 370.259 | 353.750 | 412.935 | 430.017 | 1.99 |
| - Freshwater pond | 182.918 | 171.768 | 168.478 | 177.622 | 214.393 | 4.53 |
| - Cage | 44.630 | 26.186 | 17.639 | 32.323 | 25.773 | -2.75 |
| - Paddy field | 101.212 | 94.334 | 89.930 | 94.634 | 93.063 | -1.97 |

The production comprises marine fish, inland open water fish, brackish water fisheries and freshwater fisheries. In 2000, marine fisheries made up to 78.09% of

total fish landing, inland open water 6.26%, brackish water fisheries 8.82% and freshwater fisheries 6.83%.

Trade on fishery products

The export of fish products reached its peak in 1998 and declined slightly in the following years. By volume, the average decrease was 2.75% from 1996 - 2000 and by value it decreased by 1.5% (Table 2). The major market for fish products are Asian countries, mostly Japan, followed by EU and US (Table 2). Frozen shrimp is the main product export, followed by tuna and tuna products. By

value, shrimp accounted for 59.83% of the total export value in 2000.

The import of fish products has increased by the average of 20.68% (by volume) or 7.68% (by value) yearly from 1996 - 2000. Fishmeal was the major imported fishery product during this period, mainly from Peru, Chile and Germany.

Table 2. Trade of fishery products, 1997-2002

| Year | Volume (tonnes) | | Value (US\$ 1,000) | |
|-----------------------------|-----------------|---------|--------------------|---------|
| | Export | Import | Export | Import |
| 1997 | 574,419 | 151,802 | 1,686,168 | 122,369 |
| 1998 | 650,291 | 61,104 | 1,698,666 | 52,491 |
| 1999 | 644,604 | 115,818 | 1,605,421 | 76,291 |
| 2000 | 519,416 | 179,463 | 1,675,074 | 111,476 |
| 2001 | 487,116 | 162,471 | 1,631,898 | 103,616 |
| 2002 (Jan to Nov) | 525,246 | 115,169 | 1,457,052 | 84,619 |
| Annual rate of increase (%) | -0.011 | -0.265 | -0.027 | 0.018 |

Total export of fish products in 2001 (from Jan to Nov) are presented in Table 3

Table 3. Total export by country of destination in 2001

| Importer Countries | Volume (kg) | Value US\$ |
|--------------------|--------------------|----------------------|
| US | 54,160,295 | 318,961,865 |
| EU | 83,487,416 | 190,843,618 |
| Asia | 137,647,711 | 509,805,483 |
| 1. Japan | 120,702,961 | 772,616,287 |
| 2. Singapore | 62,619,589 | 91,634,726 |
| 3. Hong Kong | 32,215,039 | 67,009,952 |
| Canada | 2,671,241 | 9,941,600 |
| Other | 131,259,591 | 180,890,539 |
| Total | 487,116,132 | 1,631,898,587 |

Annual fish consumption per capita

The supply of fish for domestic consumption has grown at an average of 5.44% annually and the consumption/ capita yearly at a rate of 4.20% annually from 1997 - 2001 (Table 4). As the national

consumption target for fish consumption is 26.44 kg/ person/ year, the consumption level of fish consumption in 2001 is still 17% below the recommended level.

Table 4. Fish consumption per capita, 1997-2001

Unit : Kg

| | 1997 | 1998 | 1999 | 2000 | 2001 | Annual rate of increase (%) |
|---------------------------|----------|----------|----------|----------|----------|-----------------------------|
| Total consumption | 3,807.20 | 4,052.52 | 4,278.55 | 4,502.68 | 4,705.79 | 5.44 |
| Consumption/ capita/ year | 19.05 | 19.98 | 21.09 | 21.87 | 22.44 | 4.20 |

Fish processing industry

Over 50% of the export-oriented establishments produce frozen fish products, while others produced other processed products, such as salted-dried, salted-boiled, smoked, fermented, frozen, canned and

fishmeal (Table 5). The main types of commodities include shrimp, tuna/ skipjack, frog legs, ornamental fish, seaweed and other fish.

Table 5. Export-oriented fish processing establishments*

| Processing Activity | In 2000 | In 2003 | Export Destination |
|--|------------|------------|----------------------|
| Canning (C) | 36 | 36 | Asia, Canada, EU, US |
| Freezing (B) | 371 | 373 | Asia, Canada, EU, US |
| Chilling (A) | 68 | 71 | Asia, EU, US |
| Other processed product (D) (Fish/ shrimp cracker, drying) | 36 | 36 | Asia, EU, US |
| Total | 573 | 578 | |

*) The same company may have more than one product

FISH INSPECTION AND QUALITY CONTROL SYSTEM

Historical development of fish inspection and quality control

Since the enactment of the Foreign and Domestic Investment Acts, the development of industrial fisheries has brought about significant progress to the export fish products. In 1970-1972, frozen shrimp was the

prime fish product for export to Japan, US and Europe. Despite the fact that the export of fish and fish products continued to expand, Indonesia was still unable to take advantage of the export of shrimp, particularly to the

US. Due to inferior quality, Indonesia used to be included in the 'block list' and the import of Indonesian shrimp product was subject to 'automatic detention'.

This market access restriction led government to establish a Memorandum of Understanding (MOU) between the Minister of Health and Agriculture in setting-up jointly a compulsory Fish Inspection and Quality Control Regulation in 1975, based on the Health and Hygiene Acts of 1960 and 1962 respectively. In the MOU, Directorate General of Capture Fisheries (DGCF) took over the responsibility for inspection and quality control of fish and fish products. The fish inspection and quality control programme administered by the DGCF includes development of fishery standards, hygiene and sanitation, of which DGCF adopted the CAC FAO/WHO - Codes of Practices for infrastructure, environment, facilities, plant personnel and operation of fish processing plant. The programme includes development of standards, fish inspection and certification of fish production facilities in accordance

with Good Manufacturing Practices (GMP), certification of competence and certification of the quality of the final product for export.

Since the issue of promoting quality assurance became a growing concern of several Ministries, the National Council of Standardization was established and it later issued regulations setting forth the Indonesian National Standardization (INS) and its implementation of the system. The regulations require compliance on: (i) Code of practices, (ii) Technical specification, (iii) Method of testing, (iv) Safety and health requirement, (v) Methods of packing, marking and labelling, and (vi) Methods of producing and description.

The INS aims to: (i) provide consumers with safety and health protection, (ii) provide quality assurance, (iii) promote efficiency and productivity of fish processing plant and meet the standard, (iv) promote competitiveness in international trade/ market, and (v) take part in environmental conservation.

Current legislation and jurisdiction

There are a number of legislative decrees concerned with the regulation of quality control and inspection of seafood products. These are:

- (1) Fisheries Law. No. 9. Year 1985, chapter 19: Government Administration of Fish Inspection and Quality Control
- (2) Government Regulation. No. 102, Year 2000: Laying down the Indonesian National Standardization
- (3) Presidential Decree No. 13/1997 issued on March 26, 1997, Setting Forth the National Standardization Agency
- (4) Decree of Ministerial of Agriculture No. 41/KPTS/IK.210/2/98 as last amended by Decree of Minister of Marine Affairs and Fishery No. Kep. 01/MEN/2002 issued on Jan 25, 2002 setting forth the HACCP-based Integrated Quality Management System of Fishery Products

- (5) Decree of Minister of Marine Affairs and Fishery (MMAF) No. Kep. 06/MEN/2002 issued on Feb 11, 2002 setting forth the Requirement and Procedure for Fish Quality Control of Fishery Products entering the Republic of Indonesia

- (6) Decree of Director General of Fisheries No. 14128/Kpts/IK.130/XII/98 issued on Dec 17, 1998 setting forth the Implementation Guidelines of HACCP-based Integrated Quality Management System of Fishery Products

Apart from the above legislations, technical guidance under respective jurisdiction of the Ministry concerned are also stipulated.

1. Fish Inspection and Quality Control Supervisory Programme that is under jurisdiction of the Ministry of Agriculture viz. Directorate General of Fisheries.

2. Accreditation program, concerning Laboratories for Fish Inspection and Quality Control that is under jurisdiction of National Standardization Agency.

3. Control of additives used in Handling and Processing of Fish and Fishery Product that is under regulation of Food and Drugs Control Body.

INSPECTION AND QUALITY CONTROL AUTHORITY

Since Indonesia suffers from economic crisis, the government has placed more emphasis on the development of the fishery sector. The development of fishery sector is currently under the Ministry of Marine Affairs and Fisheries (MMAF). The organizational structure of MMAF is shown in Fig 1.

The Directorate General of Fisheries consists of 2 Directorate Generals, namely Directorate General of Capture Fisheries and Directorate General of Aquaculture Fisheries.

The main objectives of reorganization in fishery sector are:

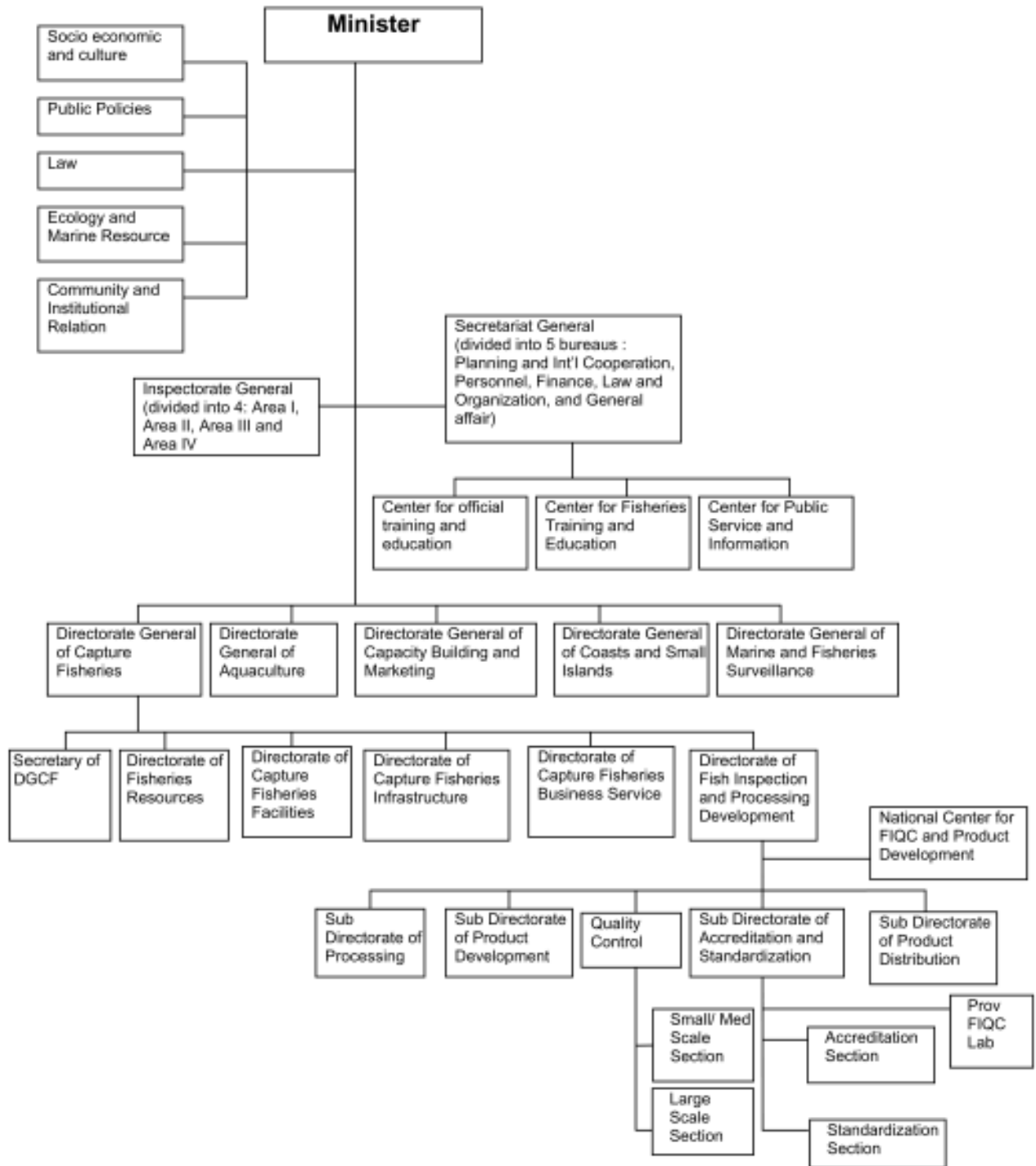
- Optimisation of fishery production in both capture and aquaculture
- Optimisation of fish utilization both for local and international market

- Harmonization with the international regulation as mandated in the Code of Conduct for Responsible Fisheries issued by FAO 1995 and SPS- WTO

The Directorate General of Capture Fisheries is supported by five Directorates and one secretary:

1. Directorate of Fish Resources
2. Directorate of Capture Fisheries Facilities
3. Directorate of Capture Fisheries Infrastructure
4. Directorate of Capture Fisheries Enterprise
5. Directorate of Fish Inspection and Processing Development
6. Secretary Directorate General of Capture Fisheries

**Fig 1. Organizational structure of the Ministry of Marine
Affair and Fisheries**



The Directorate of Fish Inspection and Processing Development conducts services on fish inspection and quality control. The Directorate is supported by 5 Sub - Directorates, that is:

1. Sub - Directorate of Fish Product Development
Carries out and provide material for the formulation of technical guidance and policies for product development
2. Sub - Directorate of Fish Processing Supervision
Provides supervision and guidance on handling and processing technology of fish and fishery products as well as technology packages on fish engineering
3. Sub - Directorate of Fish Inspection and Quality Control
Acts as the technical coordinator concerning the supervision of Fish Inspection and Quality Control
4. Sub - Directorate of Accreditation and Standardization
Sets up and monitor the application of Code of Practices and Quality Standard; develop, monitor and control the implementation of HACCP plan; set up, monitor and control the implementation of Good Laboratory Practices (GLP)

5. Sub - Directorate of Fish Distribution

Develops formulation on technical policies and guidance for fish distribution

At the provincial level, the fisheries services are operationally assisted by the Sub-Directorate of Fish Inspection and Quality Control to coordinate local inspectors to conduct supervision, inspection and quality control on a daily basis, whilst the fish inspectors attached to the central office supervise and monitor the conduct of local inspectors and conduct cross-inspection of the processing plants periodically.

The provincial laboratories directly perform the fish quality control, including certification of fishery products for fish inspection and quality control. In total, there are 37 laboratories located in different provinces. The National Center for Fish Quality Control and Processing Development acts as the reference laboratory to provide supervision to the provincial laboratories in terms of analytical methods, processing technology development and training.

Certification body

Based on the Decree of the MMAF No. Kep. 01/2001 regarding the Organization Structure and Management, the Directorate General of Capture Fisheries is tasked to '*Formulate and Implement policies and Technical Standardization of Capture Fisheries*'. This task also includes the technical standardization for fish and fishery products either aqua-cultured or captured.

The MMAF Decree of Kep.01/MEN/2002 on '*Integrated Quality Management System of Fishery Product*' has appointed the Directorate General of Capture Fisheries as the competent authority on fish inspection and quality control. The Directorate General of Capture Fisheries then developed and implemented

certification systems according to the HACCP-based Integrated Quality Management System.

Technical Guidance for the certification system is referred to the Decree of Directorate General of Fisheries No. 14128/Kpts/IK.130/XII/98 issued on 17 Dec 1998 (formerly under Ministry of Agriculture). The Decree set the procedures of certification for:

1. Prerequisite programme (SSOP & GMP)
2. Implementation of HACCP programme in the processing plants
3. Quality Control supervisor/ personnel
4. Fish and fish products for exports

IMPLEMENTATION OF HACCP IN THE FISHERY INDUSTRY

Fishery industry development policies

Strategic policies in the development of fishery industry are taken via the agribusiness development approach. The introduction of agribusiness sub-systems comprising stages of pre-harvesting, harvesting, post-harvesting and marketing consistent with implementation of HACCP. This approach is supported with improvement of infrastructure, facilities and human resources.

HACCP development program

The export market of seafood products is becoming more competitive in this global era due to the following reasons:

1. A supply-led approach in the fisheries development policies in most parts of the world tends to outstrip global demand;
2. Growing concern over public health and consumer protection based on food safety in the developed countries which leads to a tightening of requirement by importing countries;
3. Environmental issues, which have been stringently forcing the exporting countries into a difficult position, and has been used by some importing countries to protect their interest. Recent issues are the dolphin issue, antibiotic, pesticides etc

The government and the private sector have to address all the challenges above. As far as quality and safety are concerned, the fishery industry inevitably, has to keep pace with these requirements.

The traditional approach in quality control that emphasizes on the inspection of end product is no longer able to cope with the challenges. It has been replaced by a new approach based on the HACCP principles.

Many plants have used some process control and record keeping procedures similar to those required in HACCP-type programme in term of self-monitoring

quality control. However, government provides more support to establishments in order to disseminate the implementation of the programme nationwide. For this reason, the HACCP supervisory programme in fish industry has been purposed to:

1. Improve seafood quality and safety
2. Improve the Indonesian product reputation in the international market
3. Reduce cost in the quality control and inspection in the Indonesia fish industry
4. Boost efficiency by reducing risk cost
5. Establish self-regulatory quality control in Indonesian fish industry based on HACCP concept

To achieve those objectives, the Directorate General of Fisheries carried out development programmes consisting of:

1. Strengthening the fish inspection and quality control institution by conducting training programme both in country and overseas on HACCP. The target group for training programmes are senior fish inspectors and quality controllers from the DGCF who were trained as trainers (TOT) on the application of HACCP-based programme
2. Training workshop for provincial fish inspectors engaged in both government and private sector. This programme emphasizes the implementation of HACCP in the fish processing industry
3. Supervising the complete implementation of HACCP at selected fish processing plants based on the result from the provincial training workshop
4. Disseminating the implementation of HACCP in the Indonesian seafood industry during pre-harvest, harvest and post-harvest
5. Disseminating the implementation of HACCP in the fish/ shrimp culture
6. Legislative support for the implementation of HACCP

The implementation of the HACCP in the fishery industry needs to be supported with adequate legislation, which will govern the relationship between the government and private sector. The role of the government, in particular fish inspectors and benefits that will be gained by private sector having applied the new system should be clearly identified. This has been outlined clearly in the MMAF Decree No. 01/MEN/2002, and the decree of Director General of Fisheries

(now Directorate General of Capture Fisheries) No. 14128/Kpts/IK.130/XII/1998.

The development of the programme has partly been funded within the auspices of the ASEAN-Canada Fisheries Post Harvest Technology Project Phase II (1992 - 1997) and the US-AID supported Project on Development of Agribusiness.

PROBLEMS/ DIFFICULTIES ENCOUNTERED

The development of HACCP is hindered by some factors that are mainly due to more technical, social and economic reasons. A number of constraints remain in the way of developing an effective HACCP. Some of the constraints include:

1. Lack of enforcement to comply to the regulation
2. Lack of harmonized basic concept displayed by the regulatory agencies on strategic approach to promote quality assurance for the enhancement of Indonesia's share in the international market
3. Lack of understanding of HACCP by fish processors
4. Lack of effective training method to all levels, from the inspectors to the processors
5. Lack of education and extension on the part of fishermen and traders

6. Lack of budget to develop the system

The inspection and quality control programme carried out by the government personnel, and the 'self-regulatory quality control' carried out by the processor needs to be effectively and efficiently implemented. There is a need to:

1. Empower more skilled and experienced fish inspectors and in-plant quality control personnel
2. Upgrade educational level of fishermen
3. Enhance awareness and understanding to processors with regard to the task of fish inspectors
4. Provide sufficient facilities and equipment for laboratories, fish landings, fish auctions and fishing vessels
5. Empower qualified laboratory analysts

EXPECTED GOALS IN IMPLEMENTING HACCP

For the recent National Development Plan, concerning fish export markets development, the DGCF has positioned itself to meet these challenges by development of an integrated quality management system in the fish industry. This programme purposed to improve the system that covers all aspects of fish production, both at pre and post-harvest stages, in order to provide high quality assurance of seafood for

consumers. The goal is to enhance seafood safety. To implement the integrated quality management system on fishery products, good practices in all aspects of production are required, that is:

1. Good Farming Practices
Covers all key hygiene and sanitation aspects, from site selection for farming establishment to the final phase of fish production

2. Good Handling Practices

Includes hygiene and sanitation aspects during harvesting and loading, transportation or handling on-board at fishing vessel before further handling and processing stages

3. Good Manufacturing Practices

Deals with hygiene and sanitation aspects of handling and processing techniques, construction, facilities and equipment, personnel and self-regulatory quality control management in fish processing plant

4. Good Laboratory Practices

Includes laboratory management for conducting quality control of fishery products at

all stages of production. The GLP requires establishment of standardized laboratories

5. Good Inspection Practices

Includes improvement of inspection system. Its implementation does not only apply to government fish inspectors but also to the processing plants in their self-regulatory quality control, to enhance preventive measures at critical control point

6. Improved Standardization System

Under National Standardization Agency, DGF develops standard for fish products and other related measures and procedures and implement the adopted Indonesian National Standards

IMPLEMENTATION OF HACCP IN SMALL/ MEDIUM SCALE FISH PROCESSING UNIT

Based on inventory of fish processing unit in Indonesia, there were about 12,500 fish processing establishments in 30 provinces in 2002. Of these, 339 are export-oriented, which most of them have adopted pre-

requisite programme (SSOP and GMP). Around 5 - 6% of them have the certificate of sanitation issued by the Head of Provincial Fisheries Services.

Inspection and Quality Control Supervisory Programme

Within the Ministerial Decree of Marine Affairs and Fisheries, in regard to HACCP-based Integrated Quality Management System on Fish Products, the activities of inspection and quality control supervisory programme cover harvesting, transport, handling, processing, packaging and storage to distribution. This is to ensure the fish and fish products are wholesome and safe for human consumption.

The inspection and supervisory programme are targeted of all stakeholders who deal with fish harvesting, handling, processing, packing, storage, and distribution, at production sites (vessel and pond-sites), auction and landing places, distribution sites, processing plants, fish markets, and cold storage. The stakeholders include fishermen and fish farmers, collectors, traders, processors, quality control personnel and fish inspectors.

They are encouraged to implement good handling, harvesting and manufacturing practices according to prescribed Code of Practices.

To carry out those activities, DGCF have registered another 284 Fish Inspectors who serve fish processing plants in different provinces of Indonesia in 2003. The Fish Inspectors are classified as Provincial Fish Inspectors that is local government-based, and National Fish Inspector that is central government-based.

The activities of Fish Inspectors include (1) assessment of Pre-Requisite of Processing Plant, (2) performing pre-validation, (3) validation, (4) audit and (5) audit verification of the implementation of HACCP. Activities (2) and (4) are conducted by Provincial Fish Inspectors whilst (3) and (5) are by National Fish Inspectors.

The programme is manifested into certification, namely:

1. Certificate of GMP/SSOP issued by Directorate General of Capture Fisheries
2. Certificate of HACCP implementation issued by Directorate General of Fisheries
3. Certificate of Competence Required by Plant Quality Control Supervisor issued by Directorate General of Fisheries

4. Certificate of Quality or Health Certificate for Export Product issued by Provincial Laboratory and Inspection Services

As shown in Table 6, most export-oriented fish processing plants, including canning, freezing, chilling, drying and shrimp/fish cracker processing have implemented SSOP and GMP. In 2003 most export-oriented fish processing plants (339 units) are HACCP-implemented. As compared to 2000, this number is an increase of 13%.

Table 6. Number of establishments implementing SSOP and HACCP, 2000 - 2003

| | 2000 | 2001 | 2002 | Up to Jun 2003 |
|--|---------|---------|---------|----------------|
| SSOP/ GMP | 481 | 479 | 545 | 578 |
| HACCP | 249 | 204 | 295 | 263 |
| Number of fish-processing establishments | ±11,281 | ±11,815 | ±12,500 | ±12,500 |
| Export-oriented fish processing establishments | 290 | 305 | 322 | 339 |

OTHER ISSUES

It is widely anticipated that the international market for seafood will become more competitive. The major issues in the fish industry, environment and safety, have influence on fish trade relation between exporting and importing countries. These issues have been reflected in fish hygiene legislation applied by the importing countries, such as EU Commission Decisions and Council Directives, US Federal Regulation, etc.

To deal with the 'new trend' in the business climate, the government has been making extra effort to establish a cooperation or mutual arrangement with fish importing countries. These include:

1. CD No. 2001/254/EC, Mar 2001 (amended from EU' Commission Decision No. 94/324/EC, dated 19 May 1994) that appointed Ministry of Marine Affairs and Fisheries, Directorate General of

Fisheries to be the Competent Authority in Indonesia for verifying and certifying compliance of fishery and cultured products

2. MOU between DGCF and the Australia Quarantine and Inspection Services
3. MRA between DGCF and the Canadian Government Canadian Fish Inspection Agency (CFIA) on 7 Mar, 2002 regarding Fish and Fish Products Inspection and Control System
4. Initiation of MOU with US-FDA Development of MOU between Indonesia and US, regarding Fish Product Inspection and Certification has been initiated. Progress of the MOU has been achieved, such as side-by side evaluation, exchanges of information (regulation, and procedures) and field visits to fish processing. The results indicate that MOU between the two countries will be achieved in reasonable time

CONCLUSION

1. As the fishery sector is expected to increase its contribution to the country by generating foreign exchange and fish consumption, the country will cooperate to achieve harmonization or mutual recognition of the national quality and food safety assurance and certification system through exploring possibilities for establishment of a mutual recognition arrangement
2. The Directorate General of Capture Fisheries has made necessary actions to meet all those challenges by making policies that are consistent to HACCP system and other appropriate requirement issued by international body, such as FAO/WHO
3. The Directorate General of Capture Fisheries sets standards for safety and quality assurance and assures that fishery industries effectively applied the standards. Some improvements by strengthening the fish inspection system have been made, such as providing training programme to instructors, fish inspectors, quality control personnel; holding workshops to industries; performing supervision on the application of HACCP and establishment of legislative supports on the application of the HACCP
4. Agribusiness-led approach in the fishery industry development policies is taken, based to the HACCP system, which requires good practices in every sub system of the agribusiness system. The objectives are to maximize the utilization of resources, minimize fish losses during handling and processing and maintain safety in seafood production
5. In the implementation of HACCP system, DGCF as competent authority for fish inspection and quality control consistently performs validation, audit and verification to fishery industries

LAO PDR

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INTRODUCTION

Lao PDR is a landlocked country of 236,800 square km, bordered by Cambodia, Vietnam, Myanmar, Thailand and China. Relatively isolated, Lao PDR has a high degree of geographic, cultural and language diversity. Around 83% of the country is classified as rural area, thus agriculture is still considered

as the major industry in Lao PDR, contributing around 50.3% of the country GDP in 2002. Livestock sub sector contributed more than 18% of the National GDP and fishery sub sector contributed around 35% of GDP as part of livestock sub sector.

STATUS OF FISHERY IN LAO PDR

The fishery in Lao PDR is restricted to inland fisheries and freshwater aquaculture. The overall policy framework is gearing towards the sustainable use, appropriate management and protection of natural resources. In year 2002, fish accounted for about 7-8% of National GDP with the production of 87,000 tons (for

this fiscal year 2002-2003), in which Aquaculture contributed 61,000 tons. The source was received Mekong and Mekong tributaries (30%), Pond-swamps-wetlands-flood plains (43%), rice field (21%) and cage culture (6%) (Figure 1).

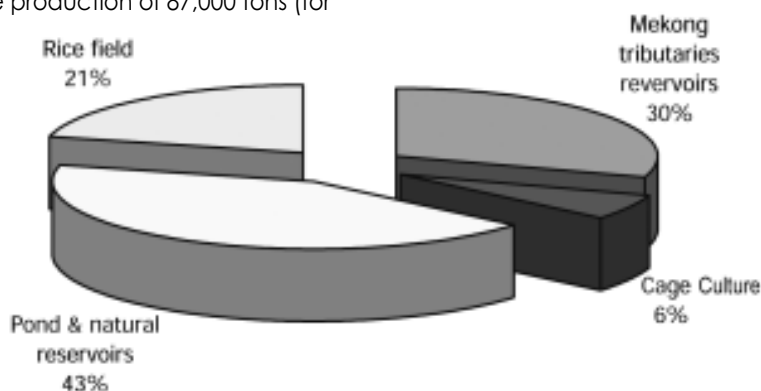


Fig 1. Fishery production in Lao PDR, 2002

The total fish production in fiscal year 2002 - 2003 is an increase as compared to previous years, mainly due to the increase in aquaculture production (Table 1).

Table 1. Fish production in Lao PDR, 2001 - 2003

| | 2000 – 2001 | 2001 – 2002 | 2002 – 2003 |
|----------------------------------|-------------|-------------|-------------|
| Total fish production | 74,400 | 83,500 | 87,000 |
| Fish production from aquaculture | 43,900 | 57,000 | 61,000 |

STATUS OF FISH PROCESSING INDUSTRY

Most of fish products are domestically consumed and are marketed in fresh form, as there is no freezer facility in the country (in village level). Due to lack of facility systems, the fish price in the market is not stable, i.e. during the peak season of the catch, the fish price is very low, but during low fish catch season especially in dry season, the fish price is very high.

The fish products have been processed traditionally in household scale since long time ago. The types of fish products are: dried, fermented, smoked, fish sauce, salted, cured. Those household-industries do processing from their home with poor or little storage and maintenance. They have inadequate knowledge

on hygiene, quality control and food safety.

The fish industry in Lao PDR is relatively small, contributing to around 14% of the country's GDP in 2001. This industry is dominated by small to medium establishments, mostly household-based. There is no large or commercial-size processing establishment registered. Based on the annual statistic in 1999 - 2000, there were 800 small food-processing establishments in the country, which include fishery and non-fishery products such as bakery, beverages and other agriculture processed products. There is a trend of increasing number of fish processing establishments, mostly the small-scale establishments.

SOME MEASURES AND FOOD STRUCTURE CONTROL

In June 1991, Lao PDR established Food and Drug Administration commission (FDA) to control food. The commission consists of 11 member representatives from 9 ministries. One of those is Ministry of Agriculture and Forestry that has two representatives of DLF (vet. specialist) in the bureau in Food and Drug Department (FDD), which carry out all activities of the commission. These are responsible to manage, control the quality of a variety of food and drug that are imported and domestically produced in order to protect the population and ensuring the consumers health.

Presently, food safety have been controlled by legislative documents, that is:

- Regulation of domestically-produced food

- Regulation of food stuff circulation
- Regulation of export and import-oriented food
- Regulation of registration

GMP for HACCP application and some Lao food standards Lao have been established, based on Codex Alimentarius commission guideline, such as drinking water, fish sauce. For other food products, which Lao food standards are not available, Codex standards are used as reference document for inspection purposes.

Some measures used to control the quality of local food products are built upon the existing regulation of provision on quality. The Control of Domestic Fish Food Products (No. 048/FMC) that includes some hygiene

parameters that are required to ensure acceptable levels of microbiological safety to be met on a continuous basis will be applied in the future. This

measure will be introduced to the food factories, as a preventive measure that offers more control than only end-product testing.

PROBLEMS/ DIFFICULTIES ENCOUNTERED

As HACCP is relatively new, there are a few problems encountered in its application, such as:

- Lack of regulatory tools

Food laws did not previously exist in Lao PDR, only some regulations and decrees related to food control to address food safety problems. Currently only three provisions concerning food quality control activities issued by the Council of Prime Minister in Dec 1991 was used as stronger measure for regulating all activities in regard to food processing and safety

- Lack of facilities and qualified food inspectors
- Lao consumers are lack of information on food safety
- Lao consumers are lack of understanding on the implication of food safety and hygiene
- Fish processing establishments are lack of understanding on the relationship of food hygiene and final product quality

PROGRESS OF HACCP IMPLEMENTATION

Though HACCP is recognized as the best tool for achieving the quality and safety levels required for food products, it is still a relatively new concept in Lao PDR. To date, there are no recorded companies that implement HACCP in their establishments.

Government, however, is actively communicating HACCP among the fishery sector. Trainings are conducted for inspectors and fish processors as well as small laboratory. Technical assistance are also given for development of HACCP in processing unit, culture, handling, packing and laboratory as well as introduction of sanitary measures such as Good Manufacturing Practice (GMP), Good Laboratory Practice (GLP) and the HACCP - based system.

To date, there are three HACCP-related workshops/ trainings conducted by government, namely:

1. HACCP implementation on traditional fish products, conducted at Namngumoudom Traditional Dried Fish in Vientiane Province and Nakasang Fermented Fish Group in Champasak Province
2. On-the-job training on Fish Processing Technology, targeted to fish processors, conducted in Pakse, Thalad, Namhum
3. After the above-mentioned training, the fish processors trained farmers on fish processing technology and HACCP programmes

In accordance with these three trainings/ workshops on the HACCP implementation for traditional products, there is increase awareness on the hygiene, quality control and food safety among the food processors. In addition, this HACCP concept is applied on the transportation of fresh fish, which use the model fisherman and middleman, as well as the method to raise and catch fish.

FUTURE DEVELOPMENT

To achieve the successful implementation of HACCP, there are various programmes and activities need to be done:

- To have and improve regular inspections carried out at the processing establishment in order to ensure compliance with the HACCP requirements
- To assist the fish processing traditional and industry (in the future) in the application of HACCP in their production operations
- To provide technical assistance for development of HACCP in processing unit, culture, handling in handling site
- To improve the areas of handling of fresh fish, processing of traditional fisheries products and control of food borne trematodes (FBT)
- To provide training program for the inspectors, TOT and fish processors as well as small laboratory analysis

MALAYSIA

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INTRODUCTION

Status of fisheries industry

The fisheries sector has been growing in Malaysia. Apart from providing direct employment to more than 84,000 fishermen and 22,000 fish culturist, this sector contributes to RM 5.45 billion or around 1.54% Malaysian GDP in 2001. This value consisted of RM 5.45 billion of marine and aquaculture landings and RM 81 million of ornamental fish production, obtained from 1.4 millions tonnes of marine and aquaculture catch and 338 million ornamental fish.

In the marine fishery sector, a total of 1,231,289 tonnes of fish was landed in Malaysian water, valued at RM 4.166 billion in 2001. In the aquaculture sector, 177,019 tonnes fish was produced, making up to 12.6%

of the total fish production. This aquaculture production was valued RM 1,206.59 million, an increase from RM 970.32 million (24.35%) in 2000.

Export and import

In 2001, Malaysia exported about 144,590 tonnes of fish and fish products valued at RM1.35 billion. Frozen shrimp made up the largest proportion of these export. In the same year, Malaysia imported about 323,199 tonnes fish and fish products, valued at RM 1.17 billion. Table 1 indicates the quantity and value of fish and fish products export from 1999 to 2001 and Tables 2 and 3 specify the breakdown detail of fish and fish product export, based on importing countries.

Table 1. Seafood export, 1999 - 2001

| | 1999 | | 2000 | | 2001 | |
|------------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|
| | Quantity (tonnes) | Value (RM\$ Billion) | Quantity (tonnes) | Value (RM\$ Billion) | Quantity (tonnes) | Value (RM\$ Billion) |
| Fish and fish products | 136,044 | 1.155 | NA | NA | 144,590 | 1.35 |

Table 2. Quantity of fishery export to various countries, 1999 - 2000

| Country | 1999 | | 2000 | | Change (%) |
|--------------|-------------------|--------------|-------------------|--------------|-------------|
| | Quantity (tonnes) | Percent (%) | Quantity (tonnes) | Percent (%) | |
| Thailand | 25,556 | 18.8 | 28,439 | 19.7 | +11.3 |
| Singapore | 27,608 | 20.3 | 27,191 | 18.8 | -1.5 |
| China | 12,383 | 9.1 | 12,251 | 8.5 | -1.1 |
| Japan | 14,885 | 10.9 | 9,871 | 6.8 | -33.7 |
| Hong Kong | 7,399 | 5.4 | 9,093 | 6.3 | +22.9 |
| Indonesia | 6,002 | 4.4 | 7,383 | 5.1 | +23.0 |
| Italy | 6,581 | 4.8 | 7,022 | 4.9 | +6.7 |
| Australia | 4,820 | 3.6 | 5,591 | 3.9 | +16.0 |
| Others | 30,810 | 22.7 | 37,749 | 26.0 | +22.5 |
| Total | 136,044 | 100.0 | 144,590 | 100.0 | +6.3 |

Source: Department of Fisheries, Malaysia (2000)

Table 3. Value of fishery export to various countries, 1999 - 2000

| Country | 1999 | | 2000 | | Change (%) |
|--------------|--------------------|--------------|--------------------|--------------|--------------|
| | Value (RM Million) | Percent (%) | Value (RM Million) | Percent (%) | |
| Japan | 260.0 | 22.5 | 255.8 | 19.0 | -1.6 |
| Singapore | 144.1 | 12.5 | 158.1 | 11.7 | +9.5 |
| Hong Kong | 88.9 | 7.8 | 118.0 | 8.7 | +32.7 |
| Italy | 105.7 | 9.1 | 116.6 | 8.6 | +10.3 |
| US | 61.8 | 5.4 | 90.5 | 6.7 | +46.4 |
| Netherlands | 56.8 | 4.9 | 79.6 | 5.9 | +40.1 |
| Australia | 62.2 | 5.4 | 61.1 | 4.5 | -1.8 |
| China | 59.2 | 5.1 | 58.5 | 4.3 | -1.2 |
| Others | 316.4 | 27.3 | 411.3 | 30.6 | +30.0 |
| Total | 1,155.1 | 100.0 | 1,349.5 | 100.0 | +16.8 |

Source: Department of Fisheries, Malaysia (2000)

DEVELOPMENT OF FISH PROCESSING INDUSTRY IN MALAYSIA

The fish processing establishments in Malaysia can be classified into traditional, small and medium scale and commercial. The fish processing industry is dominated by small and medium scale enterprise (SME), with capital asset of less than RM 100,000. Most of these are small operations and located mainly in the coastal

area, close to fish landing ports. Traditional fish processing establishments also form a sizeable part in Malaysian fish processing industry. Mostly home-based, these establishments produce traditional fish products, e.g. fish cake, fish ball, fish cracker for the domestic market. Some of them only operate during peak season

of fish landings, that is, when fish supply is readily available and the price of fish is relatively low. It is estimated that a total of 30% fish landed is being processed.

Although the fishing industry is expanding, there are still very few big fish processors. In 2002, there were

238 medium and commercial-size fish processing establishments, but only 48 of them export their products. Less than 10 of these establishments were listed in the Kuala Lumpur Stock Exchange. While traditional and SME scale processing cater for domestic market, these medium and commercial size fish processors cater for urban and export markets.

National Policy and Programme on Seafood Safety

The demand for fresh and safe seafood has increased both locally and internationally. The challenge for Malaysia, thus, is to increase production as well as achieving the global needs for safe and high quality food in international trade. HACCP has been recognised as most effective means of managing seafood safety. Importing countries, such as EU, US, Japan and Australia are working toward enforcing HACCP for imported fish products.

In this respect, the Malaysian government has formulated the Third National Agricultural Policy (NAP-3) that emphasize on the enhancement of quality and safety assurance of fisheries product. The Department of Fisheries (DOF) Malaysia is moving toward this direction, in line with this NAP-3, through its Fisheries Act, which includes quality assurance system.

Another emphasise on food safety is the setting up of the National Food Safety and Nutrition Council in 2001. Under this council, the Food Safety Policy is developed to ensure safe food production at all levels. One of the efforts of this council is the attempt to integrate the roles of various agencies in ensuring food safety.

To ensure the safety of fish and fish products, Malaysia has and will take undertake various control measures from farm to table. Such measures include:

1) Quarantine measures on fish health and diseases control for live fish

These comprise the issuance of import and export permit, health certificate and country of origin certificates. It is to ensure that control of import, export and quarantine of live fish can be effectively implemented for the control of fish disease carrying agent that pose a threat to aquaculture.

2) Safety measures at source of fish and fishery products

a) Sanitary and Phytosanitary (SPS) monitoring program on marine fisheries.

This program was initiated by the DOF to ensure that fish are caught from safe and non-polluted areas; and that fish caught is of good quality and safe to consume. The program has been carried out since 1999 where samples from selected landing sites are collected and analysed regularly. Analyses include bacteriology, histamine, heavy metals, pesticides, fish freshness index and plankton identification through water samples susceptible for micro algae biotoxins.

b) Aquaculture Farm Certification Scheme (SPLAM)

The SPLAM will be soon implemented by the DOF, where a certificate and quality mark (logo) will be awarded by the DOF for qualified fish farm which fulfil and comply with the requirements and criteria based on guidelines, standards, and practices set by the DOF. The certificate and logo will be used as an official trademark for the farm and it is valid for a period of two years.

3) HACCP Certification

HACCP IMPLEMENTATION

The HACCP system was first introduced and adopted by low acid canners in Malaysia in the 1990s. However, the Malaysian Certification for HACCP was only officially launched by the Minister of Health in Sep 2001. It describes the procedures for obtaining HACCP Certificate, as well as adequacy, compliance and follow-on audits by appointed certified auditors. Even though the Ministry of Health administers the scheme, it was developed through the collaboration of various government departments, that is Department of Fisheries (DOF), Fisheries Development Board of Malaysia (LKIM), Malaysian Agricultural Research and Development Institute (MARDI), Ministry of Health (MOH) and Standards and Industrial Research Institute of Malaysia (SIRIM). MOH is responsible for the surveillance audit, which ensures that certified plants implement and maintain the HACCP system continuously. The HACCP certificate is valid for one year. Some of the benefits gained by the certified plants are: the issue of health certificate is speedier as it does not depend on end product testing per consignment; the plants can use MOH logo on their products; and the number of routine inspection will be reduced if the proper system is continuously maintained.

MOH is the only recognised agency by EU, and lately by US, to issue HACCP certificate, whereas MARDI is given the mandate to audit HACCP plans for fish processing in Malaysia.

The implementation of HACCP is still on a voluntary basis. Only export-oriented and commercial scale plants are encouraged to apply HACCP to fulfil the requirements of importing countries and some international supermarkets.

As of Jan 2002, there are 238 medium and commercial-sized fish processing plants operating in Malaysia (Table 4). Out of these, 48 are currently HACCP-certified under the HACCP certification scheme, which is being managed by the Ministry of Health. These are mostly export-oriented plants and 45 have approved EU numbers. Another 67 plants applied have yet to be HACCP-certified. An integrated HACCP/ISO certification scheme is currently being plan to integrate both safety and quality assurance as needed by the industry.

Table 4. Status of HACCP implementation of fish processing industry in Malaysia, 2001 - 2002

| | 2001 | 2002 |
|--------------------------------|------|------|
| No. of fish processing plant* | 238 | 238 |
| No. of HACCP implemented plant | 29 | 48 |

* Medium and commercial-size plant

With a view to assist the fish processing industries, the government provides various assistances for SME to encourage them to adopt HACCP in their premises. Companies can apply for tax exemption on all costs involved in getting the HACCP certificate. DOF conducts free training programmes for line supervisors

and line workers at the Fisheries Training Institute. MARDI and the Department of Veterinary Services carry out various training programmes that are needed by the industries at very reasonable rate. In addition, courses and seminars are also conducted by some private companies and universities for industries.

Some of the trainings/ campaigns conducted to promote HACCP are:

a. HACCP awareness campaign for fish processing industry

Campaigns were carried out by the DOF in 1999/ 2000 in Taiping Perak, Kuantan Pahang, Sibul Sarawak and Sandakan Sabah. The objective was to create awareness on the importance of implementing HACCP in fish processing industry so as to ensure food safety and enhance export trade. More than 50 processors participated in each session.

b. HACCP courses

MARDI offers regular courses in HACCP for food industry in general. Courses that have been conducted include:

1. Prerequisite to HACCP Implementation
2. HACCP and Its Implementation
3. Hygiene and Sanitation - Prerequisite to HACCP Implementation

4. Course on HACCP Verification and Auditing
5. Introduction to HACCP
6. Documentation for HACCP Programme
7. Concept - Food Safe to be Eaten (for staff from the Ministry of Agriculture)
8. Training Course on Introduction to HACCP Programme in Livestock Industry
9. Microbiology in HACCP Implementation - Methods and Application

c. Other initiative

The FAO/LKIM/INFOFISH Regional Workshop on Verification and Auditing of HACCP System in the Fishery Industry was conducted in Penang, Malaysia on 7 -11 Jul 2003 to about 30 local and foreign participants. A similar workshop had been conducted in 2000.

PROBLEMS/ DIFFICULTIES ENCOUNTERED

- Lack of understanding of the background information on the fish and fishery products processing amongst QC leads to inappropriate selection of CCP (e.g. misunderstanding on the selection of frozen storage step as a CCP or just a CP and as part of GMP)
- Lack of understanding of the background information on the fish and fishery products processing and regulations of importing countries, e.g. EU and US, amongst auditors, leading to HACCP non-compliance
- Lack of proper records as to the step taken in actual implementation of processing, i.e. what is written in the record not being actually implemented
- Insufficient data recording frequency for selected parameter, e.g. temperature in manual recording
- Lack of continuous training for line-workers, production supervisors and QC for better understanding on HACCP and importers regulatory requirements
- Lack of qualified HACCP auditors
- Lack of trained trainers in HACCP in fish and fishery products

FUTURE DIRECTION

There is an urgent need for updating existing legislation and development of new legislation to support a more stringent seafood safety control namely:

- Draft Food Import Regulation
- Draft Food Irradiation
- Draft Food Hygiene

- Draft Aquaculture and Inland Fisheries Regulation
- Draft Quarantine Regulation
- Draft Animal Feed Act
- Draft National Food Safety Policy

There is also a strong need to update existing seafood standards and develop new standards for the industry. Future efforts would include:

- Integration of HACCP/ISO
- Integration of HACCP/HALAL
- Integration of HACCP/ISO/HALAL
- Integration of HACCP/Other QAS

HACCP is acknowledged as an effective food safety control system. It is evolving and more emphasis has been given by different trading blocks (i.e. US and

EU) on the understandings of the actual implementation of HACCP, and later on the requirements of verification and auditing. Codex guidelines would remain as the reference standard in HACCP implementation, and industrial application of the standard guideline would lead to a better understanding of the real situation when implementing HACCP.

Parallel to that, concerted effort to overcome constraints in analytical laboratory capability, manpower capacity on analytical works such as on biotoxin analysis, and qualified trainers in HACCP implementation, verification and auditing; need to be carried out to address the current situation. This is especially so, in view of the requirements of the new paradigm on food safety measures incorporating Risk Analysis.

MYANMAR

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INTRODUCTION

The fishery sector has become an increasingly important sector in Myanmar, contributing both to social and economic development. The fishery sector is the fastest growing sector in the Myanmar economy and is now ranked third in export value. HACCP system, implemented since 1998, is a crucial tool to ensure food safety and quality required by consumers and trade regulations.

The Department of Fisheries (DOF), under the Ministry of Livestock and Fisheries, is the government agency responsible for the inspection and licensing of all export-oriented fish processing industry in Myanmar. It is the competent agency responsible to ensure seafood safety and quality.

PRESENT STATUS OF FISH PROCESSING INDUSTRY

Myanmar is blessed with an abundance of fishery resources. Having a 2,820 km coastal line, 8.2 million hectares of inland water resources and about 0.5 million hectares of swamps along the coasts, it provides an ideal environment for various types of fish, both fresh water and marine water. In Myanmar, the fish production has been increasing consistently, from a

mere 0.83 million metric tonnes in 1995 - 1996, to 1.579 million metric tonnes in 2002 - 2003. This trend is expected to increase further, mainly because there is still a large potential from aquaculture production.

Per capita consumption in Myanmar has also increased, as shown in Table 1.

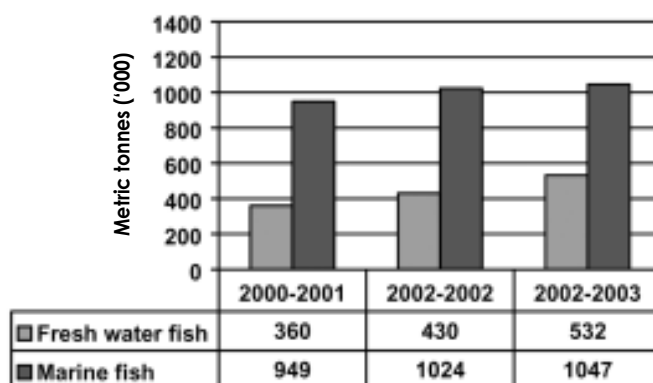


Fig 1. Production of fish and fishery products (in 1000 metric tonnes)

Table 1. Fish consumption per capita

| Year | Per capita consumption of fish (kg) |
|-----------|-------------------------------------|
| 1999-2000 | 21.8 |
| 2000-2001 | 22.7 |
| 2001-2002 | 24.5 |
| 2002-2003 | 26.2 |

Fish and fish products are exported in a few forms, such as fresh, chilled, frozen, dried, and salted. It is transported via sea, air and land. More than 40 countries have been importing fish and fishery products from

Myanmar annually. Significant importing countries are China, Japan, US, EU, ASEAN, Australia and Arabic countries. The market segments and export trend are shown in Figures 2 - 5.

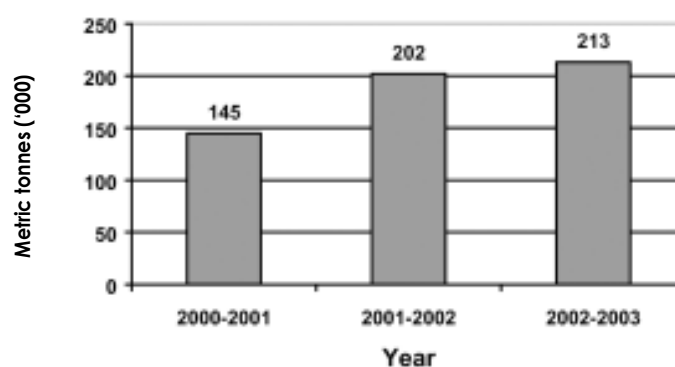


Fig 2. Export of fish and fish products (in 1000 metric tonnes)

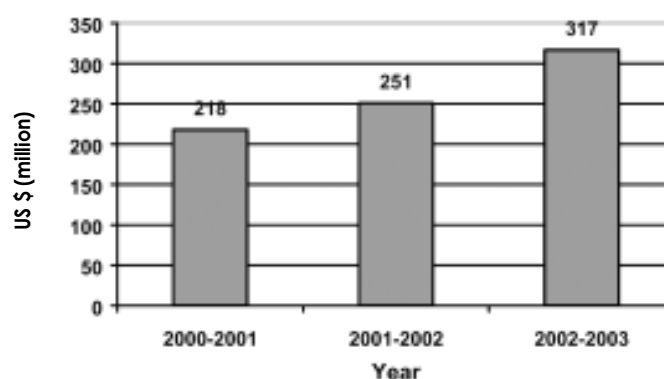


Fig 3. Export value (in million US\$)

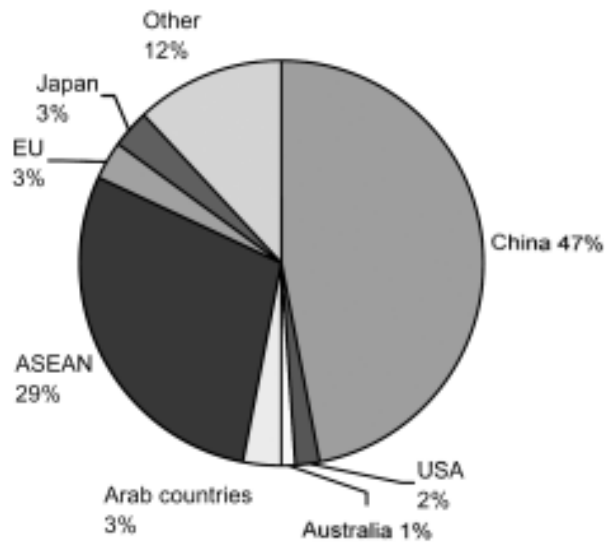


Fig 4. Quantity of fish product export by country in 2002 – 2003

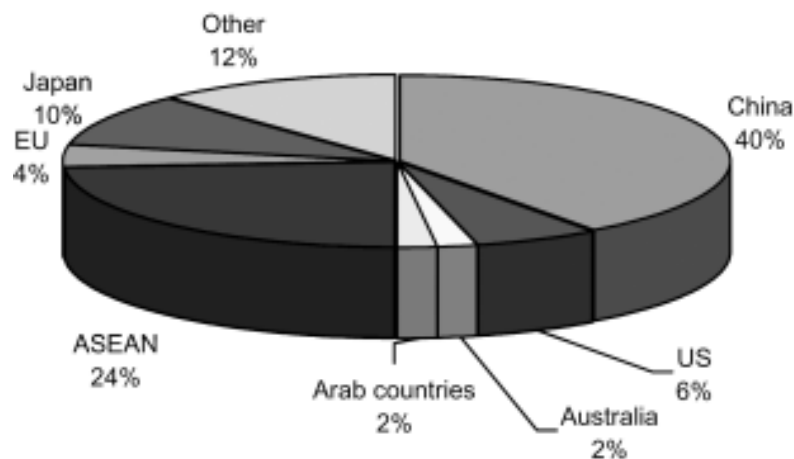


Fig 5. Value of fish product export by country in 2002 – 2003

Table 2. Fish product export quantity and value from 2000 - 2003

| Year | Quantity (1000 tonnes) | Value (million US\$) |
|-----------|---------------------------|-------------------------|
| 2000-2001 | 145 | 218 |
| 2001-2002 | 202 | 251 |
| 2002-2003 | 213 | 317 |

As of 2002 - 2003, there are a total of 134 fish processing plants, with frozen fish products establishments making up the majority of all fish

processing plants. Table 3 shows the breakdown and number of fish processing plants in Myanmar from 2000 to 2003.

Table 3. Fish processing plant in Myanmar

| Year | Frozen fish and prawn | Dried fish | Surimi | Fish meal | Total |
|-----------|-----------------------|------------|--------|-----------|------------|
| 2000-2001 | 84 | 2 | 2 | 6 | 94 |
| 2001-2002 | 120 | 3 | 2 | 6 | 131 |
| 2002-2003 | 120 | 4 | 3 | 7 | 134 |

IMPLEMENTATION OF HACCP IN THE FISH PROCESSING INDUSTRY

The Export Quality Control Section under the DOF is the main organization providing services to the export-oriented fish and fishery product industries on fish inspection and quality assurance. The Export Quality Control Section inspects fish and fishery products for compliance with international standards for export, where applicable and the imported requirements related to health, quality, safety and identity.

The DOF recognized that end-product inspection alone is not enough to ensure the quality and safety of the products, hence since 1999 the inspection system was based on HACCP. Inspection procedures and operations were revised with reference to CODEX guidelines, standard and code practices on HACCP and GMP.

The concept of HACCP has been introduced to fish processing plants since 1998. Since then, the government has been actively communicating HACCP to local fish processing establishments. Training on HACCP application were conducted to fish processing establishment's staff as well as DOF inspectors. In 1998, seven fish processing plants, out of 94 took part in the program. Factory inspections have been done twice a year since.

The training on seafood safety and quality assurance were conducted for DOF inspectors and lab technicians, by FAO and SEAFDEC (MFRD). HACCP, GMS and SSOP training were carried out yearly in state and divisions where processing plants are located. DOF would then conduct the extension training for fish processors. Training on GMP and SSOP were conducted to fish processing plants by DOF. HACCP application training was conducted by DOF to the fish processing plants, upon requests by plant owners. In 2002, 19 DOF staff were trained in connection with seafood safety programme by MFRD. From 2000 - 2003, there are a total of 164 DOF officers, which in turn trained and 699 fish processors.

In 2001, a project entitled 'Upgrading the Safety and Quality of Fish and Fishery products' sponsored by FAO was implemented. This project included:

- Revise and Review of DOF Directives
- HACCP implementation training in processing plants
- Lab operation procedure for lab technician of DOF

FAO project was extended up to Dec 2002 to further continue laboratory training, that is:

- HPLC / GC operation test for Histamine
- ELISA test chloramphenicol
- PCR test white spot virus syndrome
- Insecticide Survey Programme

NATIONAL PROGRAMMES, REGULATION AND POLICIES

It is compulsory for every registered fish processing establishment to be inspected and rated by DOF twice a year. The inspection is related to HACCP audit that is conducted by DOF once a year. This plant rating-program was approved by ministerial management committee in 2001 and started to conduct in 2002.

Plants are rated A, B, C, D and E in order of merit related to compliance relevant to DOF directives. The

plant that is rated E has to be upgraded to D and upwards within six months. Should the plant not upgrade, it is not allowed to export its products. Plants rated A and B are allowed to export their products to EU, US, Australia, Canada and Japan. C and D-rated plants are able to export their products any other countries except EU, US, Australia, Canada and Japan. To date, there are 45 processing plants that have A and B rating. The status of HACCP application in the fish processing plants in Myanmar is as shown in Table 4 below.

Table 4. Status of HACCP-approved fish processing plants, 2000 - 2003

| Year | Type of Plant | Register | Plant rating approved by DOF | | | | |
|-----------|------------------------|------------|------------------------------|-----------|-----------|-----------|-----------|
| | | | A | B | C | D | E |
| 2000-2001 | -Frozen fish and prawn | 84 | 2 | 15 | 20 | 21 | 26 |
| | -Dried fish | 2 | - | - | - | 2 | - |
| | -Surimi | 2 | - | 1 | 1 | - | - |
| | -Fish meal | 6 | - | - | - | 6 | - |
| | Total | 94 | 2 | 16 | 21 | 29 | 26 |
| 2001-2002 | -Frozen fish and prawn | 120 | 5 | 18 | 29 | 31 | 37 |
| | -Dried fish | 3 | - | - | - | 3 | - |
| | -Surimi | 2 | - | 2 | 1 | - | - |
| | -Fish meal | 6 | - | - | 1 | 5 | - |
| | Total | 131 | 5 | 20 | 31 | 39 | 37 |
| 2002-2003 | -Frozen fish and prawn | 120 | 4 | 42 | 20 | 27 | 27 |
| | -Dried fish | 4 | - | - | - | 4 | - |
| | -Surimi | 3 | - | 2 | 1 | - | - |
| | -Fish meal | 7 | - | - | 2 | 5 | - |
| | Total | 134 | 4 | 44 | 23 | 36 | 27 |

The application of HACCP has greatly assisted the fish processing establishments to meet the requirements of importing countries, leading to the increase export ability of fish processing establishments.

There is a significant progress in fish and fish products export from Myanmar to EU and other countries (Table 5 and Table 6).

Table 5. Export of Myanmar shrimp, 2000 - 2003

| No | Market | 2000-2001 | | 2001-2002 | | 2002-2003 | |
|----|--------|------------|-------|------------|-------|------------|-------|
| | | US\$ | % | US\$ | % | US\$ | % |
| 1 | Japan | 22,536,194 | 21.60 | 22,049,930 | 23.40 | 27,786,739 | 26.40 |
| 2 | US | 11,516,816 | 11.00 | 14,681,584 | 15.0 | 14,872,286 | 14.10 |
| 3 | EU | 3,477,044 | 3.30 | 5,420,582 | 5.70 | 7,541,139 | 7.20 |
| 4 | China | 11,021,253 | 10.80 | 12,536,894 | 13.30 | 11,586,078 | 11.00 |

Table 6. Export of Myanmar fish and fish product, 2000 - 2003

| No | Market | 2000-2001 | | | 2001-2002 | | | 2002-2003 | | |
|----|--------|-----------|------------|-------|-----------|------------|-------|------------|-------------|-------|
| | | Tonnes | US\$ | US% | Tonnes | US\$ | US% | Tonnes | US\$ | US% |
| 1 | Japan | 4,293.54 | 24,102,629 | 11.04 | 4,651.14 | 23,317,907 | 9.27 | 6,817.85 | 30,895,251 | 9.73 |
| 2 | US | 2,936.21 | 12,886,155 | 4.58 | 3,732.61 | 16,058,146 | 6.38 | 3,792.02 | 17,675,841 | 5.56 |
| 3 | EU | 4,116.71 | 6,596,721 | 3.02 | 5,894.48 | 10,229,428 | 4.06 | 5,767.67 | 13,315,152 | 4.19 |
| 4 | China | 69,015.13 | 66,788,243 | 30.59 | 77,311.89 | 86,701,932 | 34.47 | 100,807.85 | 128,583,447 | 40.51 |

PROBLEMS/ DIFFICULTIES ENCOUNTERED

Some difficulties in HACCP implementations in fish processing industries are:

- High cost in implementing HACCP, as perceived by small and medium-size plant
- Lack of enforcement by government
- Lack of trainings for inspectors and fish processors
- Lack of training for boat crews and farmers
- Lack of awareness on HACCP by fishermen
- Fish processors lack interest in implementing HACCP in their establishments
- HACCP training for fish processing establishments' staff are not effective due to their low education level
- Lack of FAO and WHO-approved lab equipments and techniques that are necessary to support food safety certification system
- Lack of risk assessment and hazard necessary for setting up critical limits in fish processing
- Insufficient power supply and diesel in fish processing establishments, due to high price and unstable foreign exchange, resulting to fluctuation in cold store temperature

FUTURE DIRECTION

- To conduct more HACCP training for government officers and fish processors
- To conduct HACCP training in fish catch and aquaculture procedure for boat crew and farmers respectively
- To conduct insecticide survey programme, as assisted by FAO
- To introduce GMP/ SSOP in traditional fish products processing
- To standardize lab procedures to harmonize with other ASEAN countries
- To install regional laboratory in all states and divisions
- To monitor hand swab, table swab and products test once a monthly in order to assist the Health Certification

CONCLUSION

Food safety and quality assurance are crucial for consumer protection and trade facilitation. Food safety is the responsibility of processors. HACCP system has to be implemented to ensure food safety in the processing plants. The success of HACCP application

in the processing plants in Myanmar is still far from completion. More efforts will be continued to encourage the application of HACCP in the fish processing industry.

PHILIPPINES

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BACKGROUND

With the increasing concern of the food safety worldwide, the mandatory implementation of Hazard Analytical Critical Control Point (HACCP) in the processing of fish and fishery products have been imposed by regulatory authority of the seafood importing countries, such as US, EU, Australia and Japan. Philippines is among the Southeast Asian's net exporters of fish and fish products in the international seafood market. In order to maintain the Philippines' significant position in the fish export market, the government and private sectors have taken the bolder steps to adapt this trend.

The food control program of the Philippines is primarily regulated by the Department of Agriculture (DA) to ensure that foods traded meet the quality and safety requirements of the consumers. However, as other departments are involved in the implementation of laws, rules and regulations pertaining to food, DA maintains a coordinative link and networking with such other departments i.e. the Department of Health (DOH), Department of Environment and Natural Resources (DENR) and the Department of the Interior and Local Government (DILG).

The DA Bureau of Fisheries and Aquatic Resources (BFAR) is the agency mandated under

Republic Act 8550, known as the Fisheries Code of 1998, to be responsible for the conservation, management and development of the country fisheries and aquatic resources. As such, it takes the lead in implementing the legislations pertaining to fish and fish products traded domestically and abroad.

The Fisheries Code of 1998 promulgated several Fisheries Administrative Orders (FAO) to support the implementation of the HACCP system through the fish inspection and quality and safety management programme of the Philippines. Among them are FAO No. 211 s of 2001, FAO No. 212 s. of 2001 and FAO No. 214 s. of 2001 that regulate processing SSOP, implementation of HACCP system and Code of Practice for Aquaculture.

The government takes a coordinative approach in implementing the country's food safety and quality control program in order to maximize the resources available among all other government agencies that are likewise mandated to implement this program.

Currently, the BFAR implements the Ginintuang Masaganang Ani (GMA) Program for Fisheries for 2002-2004. This program provides the national directions and framework to develop and manage the country's

fisheries resources, in order to ensure food security and the socio-economic upliftment of the fisherfolk. Under this program, development efforts are focused on the expansion and revitalization of productivity programs and the provision of support systems through

appropriate technology, research, extension and adequate financial and marketing assistance. The participation of the private sector is vital to the realization of the goals of this program.

ACCREDITATION PROGRAMME FOR HACCP IMPLEMENTATION

BFAR, as the regulatory agency for fish and fish products for export, has initiated a mandatory accreditation programme for fish processing plants based on verified HACCP compliance in conformance to international requirements for the export of fish and aquaculture products. This accreditation is carried out to enable the fish processors to continue their exports to EU and US and other export markets where mandatory implementation of HACCP is required.

The mandatory accreditation programme requires the company to submit its Licence to Operate (LTO), Quality/ Safety Assurance Programme, which include the HACCP plan for the specific products to be exported as well as Sanitation Standard Operating Procedures (SSOP). LTO, issued by the Department of Health-Bureau of Food and Drugs, will be released to the company on the basis of their compliance to GMP and SSOP.

BFAR conducts on-site inspection to validate the implementation of the submitted documents and to verify compliance to the relevant international and national legislations. A certificate of accreditation with a validity of 6-12 months and a notice of approval of HACCP program will be issued to those that meet the requirement. The validity of the accreditation varies depending on the plant rating obtained after each inspection. A certificate of implementation on the HACCP will be given to the company as requested.

Monitoring/ inspection of the plants is conducted at least twice a year to ensure compliance to the requirements. For those that fail to sustain their accreditation, official sanctions are applied accordingly, based on legal provisions of applicable rules and regulations.

PROGRESS ON HACCP IMPLEMENTATION

The progress of HACCP implementation in the country is shown in the increasing number of HACCP-certified plants from 2000 to 2003. In 1995, there was only 9 fish processing plants that are HACCP-certified. These plants were export-oriented plants with products

such as canned tuna and frozen aquaculture shrimps that are for export to EU market. The number of HACCP-certified fish processing plants has since increased significantly (Table 1).

Table 1. Number of HACCP certified fish processing plants and their location

| Geographical location | Number of HACCP certified processing plants, 2000-2003 | | | |
|-----------------------|--|-----------|-----------|-----------|
| | 2000 | 2001 | 2002 | 2003 |
| Luzon | 14 | 14 | 15 | 19 |
| Visayas | 3 | 3 | 4 | 7 |
| Mindanao | 21 | 24 | 32 | 41 |
| TOTAL | 38 | 40 | 51 | 67 |

In 2002, a significant number of fish processing plants have been added to the list of HACCP-certified plants. This can be attributed to increased number of trainings and technical assistance made available to the private sector. Moreover, the industry has increasingly realized the importance of implementing the HACCP system. The new products added to the HACCP-implemented list include frozen tilapia, smoked marinated milkfish and sardines in glass.

More and more plants are applying for HACCP certification. Currently, there are about 20 plants applying for certification. Most of them are located in the Mindanao and a few in Luzon. The products consist mainly of frozen fish and aquaculture products, value-added products, pasteurised crabmeat and traditional products, such as pasteurised shrimp paste.

Products manufactured under the HACCP system

Table 2 shows the types of fisheries and aquaculture products that are processed by the HACCP certified plants and their major markets from 2000 to 2003.

Table 2. Types of product manufactured under the HACCP system and their major export markets, 2000 - 2003

| Year | No. of HACCP certified plants | Type of products exported | Major export markets |
|------|-------------------------------|---|---|
| 2000 | 38 | Canned tuna, fresh frozen octopus, shrimps, tuna products, milkfish products, pasteurised shrimp paste, squalene capsule, canned sardine, fish sauce, fermented anchovy | US, EU, Canada |
| 2001 | 40 | Canned tuna, canned sardine, fresh frozen octopus, milkfish products, pasteurised shrimp paste, fish sauce, canned abalone | EU, US, Canada, Singapore |
| 2002 | 51 | Canned tuna, canned sardine, fresh frozen octopus/ shrimp, tilapia, tuna products, tilapia, IQF abalone, canned abalone, squalene capsule, pasteurised shrimp paste, fish sauce, fish paste, fermented anchovy, smoked Round scad | EU, US, Australia, Canada, Singapore, China |
| 2003 | 67 | Canned tuna, canned sardine, fresh frozen octopus, milkfish products, smoked Round scad, IQF abalone, canned abalone, squalene capsule, pasteurised shrimp paste, fish sauce, fermented anchovy, fish sauce, seaweed powder, sardine in glass jars, value-added fish products, pasteurised crab meat and seaweed powder | US, EU, Canada, Australia, Singapore, China |

Export of fish and fish products

Tuna remains the country's top export product. The tuna export increased from 56,752 MT in 2001 to

72,296 MT in 2002 (Table 3). Shrimp exports also increased from 12,757 MT in 2001 to 16,919 MT in 2002.

Table 3. Seafood export quantity (MT), 2000 – 2002

| Commodity / Kind | 2000 | 2001 | 2002 |
|---|----------------|----------------|----------------|
| 1. Tuna Fresh/ chilled/ frozen/ canned/ smoked/ dried | 80,108 | 56,752 | 72,296 |
| 2. Shrimp Prawn Fresh/ chilled/ frozen | 12,061 | 12,757 | 16,919 |
| 3. Octopus Fresh/ frozen | 10,239 | 41,267 | 31,098 |
| 4. Seaweeds Carrageenan, kelp powder, seaweed and algae | 56,841 | 41,267 | 31,098 |
| Grand Total | 159,249 | 122,582 | 132,134 |

HACCP training conducted

Many training courses related to HACCP have been conducted by BFAR as well as other agencies for both government regulatory officers and industry personnel. In fact, BFAR has been actively conducting the HACCP training under its Fish Quality and Safety Management Programme.

The training courses conducted for the regulatory officers and local government units include: the Principles and Application of HACCP, the Review of the

Requirements for the Export of Fish and Fish Products, and the Regulatory Audit of Fish Processing Plants. The HACCP training for industry personnel include: Training on HACCP Concept and Application in the Fish Processing Industry, Requirements for the Accreditation of Fish Processing Plants, Training on Proper Fish Handling On-Board the Fishing Vessel, Trainers Training on HACCP and HACCP Competency for Line Workers. Table 4 shows the number of participants of HACCP training conducted from 2001 – 2003.

Table 4. Number of participants attending HACCP training courses, 2001 – 2003

| | 2001 | 2002 | 2003 (as of Jul 2003) |
|-------------------------|------------|------------|-----------------------|
| Government officers | 35 | 38 | 41 |
| Non-government officers | 250 | 340 | 325 |
| Total | 285 | 378 | 366 |

SOCIO-ECONOMIC BENEFITS OF HACCP IMPLEMENTATION

During the past years of HACCP implementation, the industry has begun to realize the significant socio-economic advantages of HACCP implementation. Since HACCP is meant to ensure the safety of the products, it has somehow form part of product promotion to some processors, thus encouraging them to comply with the food safety requirements of their buyers to sustain continued consumption of their products.

HACCP implementation also enables the processors to expand their markets, thereby giving

a continuous employment security and job opportunities for the people. Such advantages are demonstrated in the manner each accredited processor has put value in to the system and continued to support its implementation.

Since the implementation of HACCP has become a partnership between the government and the industry sectors, maintaining and sustaining its implementation has become a continuing challenge towards global competitiveness on seafood trade.

ISSUES AND CONCERNS ON HACCP IMPLEMENTATION

While the significant of HACCP implementation cannot be over-emphasized, there are certain issues and concerns that affect the industry and government as well. The primary issues are:

From the industry:

1. Limited technical qualification of some HACCP team members. This leads to many deficiencies occur during recording data for CCP monitoring, as well as incorrect identification of hazard and CCP
2. Lack of scientific information or standards for specific products, leading to inconsistency in the setting of critical limits for some products
3. Lack of financial capabilities needed for upgrading premises and implementing HACCP, particularly in small and medium establishments

From the government:

1. Lack of trained manpower and financial resources at the regional and local government level
2. Limited manpower capacity, resulting in low frequency of inspections of the fish processing establishments at the regional level
3. Lack of communications and transport services to support to fish inspection activities (internet connectivity and transport vehicle).
4. Limited budget and politics situation leading to non-implementation of planned activities
5. The stringent requirements of the fish importing countries
6. The inadequate resources available in Philippines to cope up and meet such requirements from importing countries
7. The need for external technical assistance

NEW STRATEGIES AND DIRECTIONS

1. Raw material control program

To ensure that products are free from chemical contaminants and marine biotoxins, the safety 'From Water to Table' concept has been adopted and is now posing a problem among the aquaculture fish producers and suppliers. The government has commenced implementing Fisheries Administrative Order no. 214, known as the Code of Conduct for Responsible Aquaculture to ensure the production of high quality broodstocks, seeds and fingerlings. The exporters are now required to observe proper control of raw materials from the source through the provision of suppliers' guarantee, product tests for antibiotics, and other contaminants. Production sites are subjected to regular monitoring and surveillance.

2. Advocacy and information and educational campaign (IEC)

Continuous training on HACCP, GMP and SSOP and on the marketing of fish and other fish products, in order to create awareness on food safety and on export market requirements for the key players from production to processing and distribution.

3. Technical and advisory assistance

Collaboration with fish processors on proper plant design and process layout in order to address the hygienic and sanitary aspects in plant construction.

4. Inter-agency collaborations for mutual technical and financial assistance from international bodies

5. Promulgation of additional legislations to further support the fish inspection and fish product quality and safety management system

6. Review of the current organizational structure within the BFAR to further strengthen the fish product safety and quality management implementation

7. Involvement of the local government units in the inspection of fish markets and other ancillary fish post harvest facilities such as fishing ports and fish markets, in order to ensure safe fish supplies

SINGAPORE

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INTRODUCTION

The application of HACCP concept to the fish processing industry has gained increasing popularity in many developed countries as the system of choice for enhancing food safety and quality. Many of these countries have integrated this system into their food inspection programme and national legislation. Some have gone one step further by also requiring their domestic industry as well as those that export fish and fishery products into their markets to adopt the same concept in their production and operations.

In Singapore, the Food and Veterinary Administration (FVA) of the Agri-food and Veterinary Authority of Singapore (AVA) is the competent agency responsible for the inspection and licensing control of all fish processing establishments in Singapore. AVA's primary concern is to ensure wholesomeness and public health safety of fish and fishery products for human consumption as well as to meet with the health and

sanitary requirements of the importing countries in respect of the plants' exports and premises.

The concept of HACCP has been introduced in Singapore in the mid 1990s after it was incorporated into the food legislation in the EU, after the adoption of the EU Food Hygiene Directives in Jun 1993. Since then AVA has been actively communicating the basic principles and necessary information required for its effective implementation to the fish processing industry. In Dec 1999, The Wholesome Meat and Fish Act was enacted. One of the key features of this act is the requirement for all fish processing establishments in Singapore to develop and implement a food safety programme at their premises. In addition to numerous benefits arising from the implementation of HACCP and in view of the need to align with international food safety requirements, AVA has mandated HACCP requirements for all types of fish processing.

FISH PROCESSING INDUSTRY IN SINGAPORE

The fish processing industry in Singapore consists of two broad categories, that is, export-oriented processing establishments and local processing establishments. These establishments produce a wide range of fish products such as comminuted fish

products, e.g. fish ball and fish cake; Chinese delicacies, e.g. dried shark fin; and frozen and chilled seafood, e.g. prawn, fish fillet and mollusc. The majority of the fish processing establishments produce for domestic market while others produce mainly for export.

Export-oriented fish processing establishments

Singapore, though being a net importer of fish and fishery products, also export a significant amount of fresh, frozen and other processed fish and fishery

products. The quantity and value of seafood export from year 2000 to 2002 is shown in Table 1.

Table 1. Export of seafood from 2000 – 2002

| Export | 2000 | | 2001 | | 2002 | |
|---|-------------------|----------------|-------------------|----------------|-------------------|----------------|
| | Quantity (tonnes) | Value (S\$) | Quantity (tonnes) | Value (S\$) | Quantity (tonnes) | Value (S\$) |
| Fresh, chilled and frozen fish | 98,328 | 566,342 | 78,308 | 469,038 | 60,859 | 324,880 |
| Processed fish (including dried, canned and preserved fish) | 13,835 | 167,670 | 16,826 | 153,936 | 20,663 | 189,882 |
| Total | 112,163 | 734,012 | 95,134 | 622,974 | 81,522 | 514,762 |

Some of the importing countries for Singapore fish and fish products are EU, Australia, US, Japan, Hong Kong, China, Canada and Taiwan. In order to facilitate the industry's export abroad, AVA provides health certification for them. Processing of the products destined for export are monitored closely to ensure that they comply not only with the requirements imposed by importing countries but also that sanitary and hygiene standards are maintained at the highest level at all time. Samples of the products are collected for the relevant laboratory tests, i.e. microbiological tests,

heavy metals, antibiotics, etc. Health certificates are then issued upon satisfactory laboratory results. Some of these export-oriented fish processing establishments also process their products for the local market.

Many of export-oriented establishments, especially those exporting to EU, are HACCP-certified and have readily adopted Good Manufacturing Practices (GMP) to meet the requirements of the importing countries.

Local fish processing establishments

Local processing fish establishments make up the majority of the fish processing establishments in Singapore. They consist of small to medium-sized enterprises, many of them are family-owned business. Most of their processing is still done manually and are labour-intensive. The floor areas for these establishments are relatively small, typically around 90 - 120 square

meters. This physical space constraint can give rise to poor housekeeping and increase the possibility of cross contamination between cooked food and raw materials. Moreover, unlike their export-oriented counterparts, many of the workers of local establishments have inadequate knowledge of hygiene and sanitation.

Status of fish processing industry in Singapore from year 2000 – 2003

The number of fish processing establishments in Singapore has been declining from 99 in 2000, 95 in 2001 and 88 in 2002. To date, there are 90 fish processing

establishments in Singapore in 2003. The number of establishments according to each category is shown in Table 2.

Table 2. Fish processing establishments in Singapore from 2000 – Jun 2003

| Product type | 2000 | 2001 | 2002 | As in Jun 2003 |
|--|-----------|-----------|-----------|----------------|
| Comminuted fish products (e.g. fish ball, fish cake, <i>otah</i>) | 49 | 48 | 46 | 46 |
| Frozen fish products (e.g. tuna, swordfish) | 25 | 24 | 22 | 24 |
| Dried seafood products | 0 | 0 | 0 | 0 |
| Chinese delicacies (e.g. shark fin, sea cucumber) | 23 | 19 | 17 | 17 |
| Crustaceans, mollusc | 2 | 4 | 3 | 3 |
| Total | 99 | 95 | 88 | 90 |

AVA'S APPROACH TO THE HACCP IMPLEMENTATION IN FISH PROCESSING INDUSTRY

Since The Wholesome Meat and Fish Act was enacted in Dec 1999, it has been mandatory for all fish processing establishments to submit HACCP plans to

AVA upon licence application or renewal. However, the implementation of HACCP is still on voluntary basis.

Table 3. HACCP implementation in fish processing industry

| | 2000 | 2001 | 2002 | As in Jun 2003 |
|--|------|------|------|----------------|
| No. of licensed fish processing establishments | 9 | 95 | 88 | 90 |
| No. of EU-approved fish establishments | 11 | 14 | 15 | 12 |
| No. of HACCP-certified (3 rd party) fish establishments | 3 | 5 | 9 | 9 |

From Table 3, it can be seen that although the number of licensed fish processing establishments have decreased but the number of EU-approved establishments and HACCP-certified establishments have steadily increased. The decline as of Jun 2003 was due to closure of 3 plants due to the economic downturn.

Some fish processing establishments have enlisted third party-accreditation organisations to audit

their HACCP plans and system. Following successful auditing of the system, processing establishment would be awarded certifications under various HACCP schemes. Audit checks would then performed regularly to ensure that the HACCP plans were correctly administered and the system was working effectively. To ensure that the auditing party are competent to perform certification of HACCP, AVA is in the process of developing HACCP audit and certification procedures and auditor approval criteria to accredit

organisations that are competent to perform this scheme on behalf of AVA. To date, there was one workshop organised by AVA in Oct 2002 to train its staff in HACCP auditing procedures and techniques.

Another scheme to encourage small fish processing establishments to implement HACCP was proposed by Marine Fisheries Research Department (MFRD) and Standards, Productivity, and Innovation Board (SPRING, formerly known as PSB). This scheme proposed cost sharing among the plants to reduce the

cost of implementing HACCP. This scheme, proposed in 2002, currently has yet to be implemented due to economic downturn.

As incentive for the local industry, the Government has provided financial assistance for consultancy cost under the Local Enterprise Technical Assistance Scheme (LETAS). Processing establishments can apply for grants up to 70%, maximum of S\$ 14,000 for consultancy costs and up to 50%, maximum of S\$ 5,000 for certification costs.

PROBLEMS/ DIFFICULTIES ENCOUNTERED

The implementation of HACCP in local establishments is noticeably slower than its export-oriented counterparts. Some of the possible reasons are:

- **Misconceptions about HACCP**

Small-medium enterprises often associate the implementation of HACCP as criteria that need to be complied only by those who intend to export the products overseas. In actual fact, HACCP has to be implemented by all processing establishments, to ensure product safety and

quality and to prevent potential food hazards. In addition, there is a misconception that HACCP is difficult to apply in small processing establishments, as there is a large cost involved and expert needed.

- **Economic downturn**

Due to the recent economic downturn, many establishments are affected and delaying HACCP implementation as it is still on a voluntary basis

CONCLUSION

Although HACCP has been mandated as the system of choice to ensure food safety by AVA, the driving force lies heavily on the industry's eagerness and commitment to develop and implement it to in order to make this initiative a success. Even though many fish processors recognised the usefulness and importance of HACCP to ensure product safety and quality but the implementation of HACCP has generally been quite

slow, especially in small establishments. This is due largely to the lack of resources (technical, financial and manpower) and the limited understanding of HACCP principles and application. In view of this, the government through AVA has and will continue to assist the industry, by providing training and incentives for HACCP implementation.

THAILAND

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INTRODUCTION

HACCP, which stands for Hazard Analysis and Critical Control Point, clearly expresses its approach to food safety, which is to identify the pertinent hazards and establish control measures to prevent them. Since the process of designing such control measures requires a science-based judgment, the HACCP system, if developed and implemented effectively, can assure product safety (though not 100%) and has become acceptable worldwide for food safety improvement.

HACCP becomes well known when developed countries like the US and EU have incorporated it into their food regulations. The new HACCP regulations, 21CFR 123 of the USFDA and the directive 94/356/EC of the EU, impose fish processors to be responsible for identifying hazards that are likely to occur and for establishing critical control points to prevent or reduce contamination. Thailand, as a fish processing country, has also adopted the HACCP program and made it

mandatory to its export-oriented fish processors since 1996 under the jurisdiction of the Department of Fisheries, the competent authority responsible for inspection and export certification of fish products.

As in many other countries, the HACCP principles were not thoroughly understood and difficult to apply effectively at the early stages of its implementation. Lots of trainings were organized for both private sectors and regulators to enable them to have a better understanding on the HACCP, which should not be seen as a trade barrier, but as measures to ensure product safety. 2003 is the sixth year since HACCP was implemented in Thailand. Though there are still a few problems faced, it has been much less than in the beginning. This report will describe the progress made in the application of HACCP in the export fish industry in Thailand, problems encountered, and planned strategy to overcome the problems.

PROGRESS MADE IN THE APPLICATION OF HACCP

The Department of Fisheries' (DOF) HACCP requirements mandate fish processors to conduct an analysis to identify hazards that are reasonably likely to occur and develop, as well as to implement plan to

control them. Apart from the HACCP plan, the processors are also required to develop the written procedures for controlling GMP and implement it to avoid the spreading of contamination from working

environment to the product. Examples of those controls are condition and cleanliness of construction and equipment, control of personnel hygiene, control of pests, etc. When the submitted documents are deemed to be satisfactory in accordance with food safety requirements, the DOF will proceed to in-plant audit to verify its compliance. The processors need to rectify the non-compliances found from the audit within the agreed time frame. The processor will be graded as

'compliance' only when the follow-up audit shows that all corrective actions are taken. The HACCP certificate will be issued upon request from the processor. The first issue will be valid for 6 months and thereafter will be in accordance with its later assessment records. The DOF will conduct an audit at the frequency of 2 - 4 times per year for each processor depending on its previous audit results.

Table 1. Number of fish processing plants implementing HACCP

| Processing type | 2000 | | 2001 | | 2002 | | 2003* | |
|-------------------------|------------|------------|------------|------------|------------|------------|------------|------------|
| | R | H | R | H | R | H | R | H |
| 1. Frozen | 118 | 91 | 124 | 120 | 153 | 150 | 161 | 153 |
| - shrimp | | (77%) | | (97%) | | (98%) | | (95%) |
| - cephalopod | | | | | | | | |
| - fish | | | | | | | | |
| - value added | | | | | | | | |
| - surimi | | | | | | | | |
| - surimi based products | | | | | | | | |
| 2. Canned | 30 | 23 | 34 | 32 | 38 | 36 | 43 | 38 |
| - tuna | | (77%) | | (94%) | | (95%) | | (88%) |
| - sardine/ mackerel | | | | | | | | |
| - shrimp | | | | | | | | |
| - bivalve mollusk | | | | | | | | |
| - cephalopod | | | | | | | | |
| 3. Traditional | 26 | 10 | 29 | 15 | 38 | 30 | 40 | 31 |
| - salted | | (38%) | | (52%) | | (79%) | | (78%) |
| - fermented | | | | | | | | |
| - dried | | | | | | | | |
| - fish sauce | | | | | | | | |
| - shrimp paste | | | | | | | | |
| Total | 174 | 124 | 187 | 167 | 229 | 216 | 244 | 222 |
| | | (71%) | | (89%) | | (94%) | | (91%) |

* as of June 2003

R: registered processors

H: HACCP implemented processors

FISH PROCESSING INDUSTRY IN THAILAND

The fish processing establishments in Thailand can be classified into three groups according to their products, that is, freezing plants, canneries and traditional fish products plants. The products from freezing plants include frozen shrimp, fish and cephalopod. Canneries products include canned tuna and other canned fish. Traditional products include dried and fermented fish, and chili shrimp paste.

Canneries and freezing plants sector show better progress in implementing HACCP in their premises than traditional fish products plants. This is because most canneries have developed the control procedures and carried out monitoring and recording as required in low acid canned food regulations of the USFDA and Canada even before HACCP came into force. This eases the development and implementation of HACCP in their premises. In addition, it was a common practice for the established cannery to have buyers or appointed agency to inspect their premises. This practice, similarly, enable the cannery to understand the proper control of particular hazard.

Unlike the established cannery, new canneries often do not have sufficient experience in quality control and/ or lack experienced staff to establish the appropriate control in processing.

Deficiencies found in canneries, at the beginning of HACCP application, were often associated with inappropriateness of written plans, e.g. invalid critical limit, inadequate frequency of monitoring, or inappropriate corrective action procedures. Later on, deficiencies are associated with the practice done, e.g. incompliance of monitoring frequency, corrective action not taken when deviation occur. The incompliance with the monitoring frequency is mostly due to the too stringent design of monitoring frequency, which often impractical in the actual operation. The

most often cases are the frequency of checking the fill weight at filling step and seam tear down measurement at the seaming step. Similarly, the deficiencies in corrective action are often associated with the too restrictive critical limits. In many cases, the product will still be considered safe, thus the processors often choose not to take corrective action, as it is deemed unnecessary. However, from auditor's point of view, noncompliance will be considered failure to comply with the written plan. In this case, the processor can opt to either revise its plan to suit the actual operation and monitoring or strictly follow the plan even though hazard will not actually occur from some certain deviation.

Freezing plants are another group that has been successfully implementing HACCP system. The main products of this group are frozen, raw or cooked black tiger shrimp; frozen cephalopods, both for ready-to-eat consumption and for cooking purpose; frozen fish; and value-added products, such as dimsum, breaded product, and Japanese style product. Some of these frozen products do not need HACCP plan, since there is no significant hazard that likely to occur, either from the raw material itself or from the process. Examples are frozen raw fish (with exception of scombroid group) and frozen raw cephalopods which required heating before consumption. Nevertheless, the non-HACCP product (does not need HACCP) is still required to comply with the minimum standard of GMP and sanitation control to eliminate introducing of contamination from environment onto the products.

Since frozen black tiger shrimp is mostly farm-raised shrimp, it's inevitable to include drug residues that are likely to be used during aquaculture period. In the past, control of this hazard was conducted upon shrimp arrival at the processing plants, where samples were taken for analysis. Acceptance of raw material lot relies

on the test results that sometimes did not represent the whole lot, if shrimp were from different sources and pooled up to be one lot. The more effective control that recently applied will focus on the control at the farm level. Good Agricultural Practice (GAP) has been introduced to shrimp farming. The DOF has conducted training for farmers and provided certification for the compliance farms. Though GAP is currently a voluntary program for the farmers, with effect from 1 Jan 2004, any processors who wish to comply with the DOF's requirements on drug control are required to use raw material only from the GAP farms. The processors are also required to establish system that enable tracing the product back to the source of raw material.

As for the process related controls, especially the cooked products, deficiencies found are associated with invalid critical limits of cooking time/ temperature or too restrictive cooking time/ temperature applied. Invalid cooking process is due to the lack of available studies to identify the proper procedure that is necessary to reduce the *Listeria monocytogenes* to 6D, which is one of the safety requirements. Too restrictive process time/ temperature causes noncompliance with the written plan. Like deviation in cannery, corrective action might not be taken for deviation since processors know that the products are still safe.

The most frequent deficiencies from frozen raw products processing is the invalid critical limit. As pathogenic bacteria were identified as a hazard from raw material, to reduce or eliminate bacteria, the critical control point was set at washing step, thus set critical limit was set as level of chlorine residue in water and water changing frequency. It is difficult to prove during validation whether the set level of chlorine and water changing time will be capable to eliminate the pathogenic bacteria, if present. It is often not mentioned on the actual condition of washing compared with the study condition, the initial load of bacteria, and how to maintain the chlorine levels

as required at all the time of washing.

Traditional product sector is the last group to join implementation of HACCP. It is relatively slower than the cannery and frozen sectors. Traditional fish product sector is dominated by medium and small-scale enterprises. The medium scale establishments are generally more ready in implementing HACCP than small-scale counterparts, where most of their prerequisite requirements are still not yet in place. However, there are more and more traditional fish processing establishments that are successfully implementing HACCP for export purpose.

The government has noted the difficulties of small-scale establishments in achieving the food safety requirements. The main reasons are due to their limited financial abilities and technical knowledge. To ease and encourage industry in developing HACCP system, the Ministry of Industry and the Small Industry Finance Corporation have launched two projects for financial and technical support to the industry. These projects have been successfully operated as proven by the increasing numbers of small-scale establishments that have been granted HACCP certification.

Overall, deficiencies from HACCP implementation were likely associated with CCP determination, invalidated critical limit and impractical corrective action. The processors have the misconception that only CCP can control contamination, hence absence of CCP on certain steps may not satisfy the external auditor. Hence some processing steps that did not really need CCP were apparently determined as CCP. Control procedures of critical limits, monitoring, and corrective actions of such CCP is not correctly targeted on the hazards, thus impractical to follow. Moreover, too many CCP also cause more difficulties to the processors to maintain effectiveness of their HACCP system, as too many factors need to take care of and verify, especially for

the small-scale processors. Another deficiency was related to the prerequisite controls. This was the case when determining if the hazards identified at that particular processing step were significant or likely to

occur. The prerequisite controls e.g. GMP, SSOP were normally referred to as a justification for not being a significant hazard and hence not a CCP. No monitoring and recording to prove the existing of such activities.

EXPORT OF FISH AND FISH PRODUCT

Table 2 shows the value of the major exported fish products from 1999 to 2002. US is the largest market for frozen shrimp and canned tuna, EU is the main

market for frozen cephalopods and Asia in particular Malaysia and Japan for fresh and frozen fish.

Table 2. Exports of fresh and frozen shrimp in quantity (metric tonnes)

| Items | 1999 | 2000 | 2001 | 2002 |
|--------------|----------------|----------------|----------------|----------------|
| 1. Asia | 63,912 | 60,037 | 57,366 | 47,672 |
| 2. US | 52,746 | 65,261 | 67,167 | 42,296 |
| 3. Canada | 4,609 | 4,498 | 5,802 | 4,901 |
| 4. EU | 7,743 | 6,612 | 7,059 | 1,814 |
| 5. Australia | 5,906 | 3,927 | 3,643 | 3,209 |
| 6. Others | 3,189 | 4,053 | 3,569 | 2,861 |
| Total | 138,105 | 144,388 | 144,606 | 102,753 |

It is irrelevant to point out that the application of HACCP increases the export quantity. The figure for HACCP-implemented establishments (Table 1) does not correlate with export quantities (Table 2 - 5). However, it is worth to note that the application of HACCP is something that unavoidably must be carried out if the processors wish to maintain their trading status and seek for the new markets.

The shrimp exports were quite stable from 1999 to 2001 but declined dramatically in 2002, especially to the EU market which decreased by more than 50% from the previous years (Table 2). This is due to the issue of nitrofurans residue in aquaculture black tiger shrimp. It has since been resolved and strictly controlled from the upstream and processing plants. The processors are

required to add this drug as a CCP at the receiving step. The controls must include the shrimp sources and proper system to ensure reliability of the sources.

Similarly, the cephalopods export has been quite steady from 1999 to 2001 and increased substantially in 2002 (Table 3). Most of frozen cephalopod processors do not need HACCP plan for their premises, as their products require heating before consumption. The bacterial contamination that may be introduced during the process can be controlled by applying proper GMP. However, there is a possibility of chemical hazard in the final products due to the occurrence of high amount of heavy metals in some catching area. In this case, CCP would be the control of raw material source.

Table 3. Exports of fresh and frozen cephalopods in quantity (metric tonnes)

| Items | 1999 | 2000 | 2001 | 2002 |
|--------------|---------------|---------------|---------------|---------------|
| 1. Asia | 47,092 | 46,991 | 44,881 | 46,837 |
| 2. US | 3,144 | 3,324 | 3,201 | 4,426 |
| 3. Canada | 1,516 | 1,254 | 964 | 1,640 |
| 4. EU | 27,880 | 27,036 | 26,916 | 32,337 |
| 5. Australia | 2,703 | 2,542 | 3,955 | 4,648 |
| 6. Others | 2,974 | 2,243 | 2,108 | 2,928 |
| Total | 85,309 | 83,390 | 82,025 | 92,816 |

The largest market for fresh and frozen fish is Asia, in particular Malaysia and Japan, followed by Middle East countries (Table 4). The products are in whole, fillets and breaded form. With the exception of scombroid

fish, there is relatively no hazard concerning this raw product. Like cephalopod processors, fresh or frozen fish process will not need HACCP plan, only the prerequisite GMP or SSOP.

Table 4. Exports of fresh and frozen fish in quantity (metric tonnes)

| Items | 1999 | 2000 | 2001 | 2002 |
|----------------|----------------|----------------|----------------|----------------|
| 1. Asia | 220,209 | 181,248 | 176,121 | 175,573 |
| 2. Middle East | 5,003 | 6,705 | 7,267 | 7,912 |
| 3. US | 2,627 | 2,028 | 2,028 | 1,653 |
| 4. Canada | 591 | 597 | 413 | 545 |
| 5. EU | 4,911 | 2,888 | 3,034 | 1,903 |
| 6. Australia | 2,945 | 565 | 646 | 334 |
| 7. Others | 15,479 | 14,489 | 9,501 | 6,217 |
| Total | 251,765 | 208,520 | 199,007 | 194,137 |

The total export value of canned tuna is relatively stable from 1999 to 2002. The main markets like US, Australia, and EU require processors to have HACCP in place.

Table 5 Exports of canned tuna in value (US\$ millions)

| Items | 1999 | 2000 | 2001 | 2002 |
|-----------------|--------------|--------------|--------------|--------------|
| 1. US | 187.3 | 126 | 158.1 | 138.2 |
| 2. Canada | 62.2 | 52.8 | 60.4 | 57.2 |
| 3. Australia | 45.4 | 38.6 | 41.8 | 47.6 |
| 4. Japan | 36.2 | 38 | 39.3 | 47.4 |
| 5. Egypt | 20.3 | 40 | 43.5 | 32.8 |
| 6. Saudi Arabia | 25.4 | 13.1 | 28.7 | 28.7 |
| 7. UK | 37.8 | 23.3 | 32.8 | 28.7 |
| 8. Others | 163.7 | 138.5 | 175.2 | 180.5 |
| Total | 578.3 | 470.3 | 579.8 | 561.1 |

SUMMARY OF PROBLEMS IN IMPLEMENTING HACCP FROM 2000 TO 2003 AND STRATEGIES TO OVERCOME PROBLEMS

As the DOF is responsible for the certification of exported fishery products only, the issues that will be mentioned below are limited to the export processing plants, of which most are medium to large size enterprises. Problems encountered by industry, especially the medium to small size enterprises, are related to personnel qualification and technical knowledge.

1. The main problem encountered during the first stage of HACCP application is the misunderstanding of HACCP principles of the HACCP team. Inappropriate written HACCP documents often miss some significant hazards and include inappropriate control measures to prevent hazards from occurring. This also includes an impractical HACCP plan that design too restrictive critical limit, which result to many deviations and corrective actions that need to be taken during the daily operation

To help develop effective HACCP plan, more advanced HACCP training have been organized by the DOF to clarify the industry on the gray areas and issues frequently misunderstood of HACCP application as well as new emerging hazards that need to be controlled. After a period of time, more understanding of HACCP is learnt and improvement of HACCP documents and implementation are gained

2. Invalid critical limits is another issue especially for the shrimp cooking process. Like the retorting process of the Low Acid Canned food, the cooking process of the shrimp needs to prove its sufficiency to reduce the pathogenic bacteria, such as *L. monocytogenes* to 6D. At present, large factories have their own equipment to establish the process based on the data provided by the DOF. Some institutes such as university and the

National Food Institute also provide the services for those who do not have knowledgeable personnel and equipment to conduct the study.

3. Inconsistent implementation of the HACCP plan as written in the approved manual. It was observed that the later regulatory audit to the HACCP effectiveness sometimes found that the plans are not followed as they were in the first audit. One of the causes of this problem relate to improper conducting of internal verification. This is because the HACCP team does not really understand what verification activities should be carried out and how to verify. Many processors choose to conduct the sanitation and GMP check rather than observing the HACCP activities like monitoring, corrective action, etc. In the case of the processor who is also certified for ISO 9000, internal audit is required by the ISO but will be more focused on ISO quality assurance activities rather than HACCP food safety issues.

Internal verification training has been organized by the DOF for the industry. Clarification of the internal audit and examples are given. From the later regulatory audits, it shows the improvement of this problem.

4. Lack of financial resources for improving construction and equipment and personnel competency to carry out the HACCP development and implementation, especially for the small processors. In regard to this, the Small Industry Finance Corporation has provided financial supports for renovation purpose and the National Food Institute, with the financial assistance from the Ministry of Industry, has also provided consultancy services and training with low fees to encourage the smaller enterprises to implement HACCP.

FUTURE DIRECTIONS

The Government has set 2004 as food safety year. As such, all sectors involved in the food chain, either private or government have to establish its own strategies to accomplish the food safety goal. As for DOF, the regulator for the fish product certification, future directions have been set to support the HACCP implementation of the industry as follows.

1. More controls to be focused on the raw material safety up to the sources, catching areas, culture farms and hatcheries. In the past, the safety of finished products is the entire responsibility of the processors. But as some hazards could come from the raw material itself and cannot be eliminated by any processing step, the strict control of incoming raw material will serve to enhance the safety of the final products. Product traceability is also required as part of the raw material controls
2. Conducting on-going training for the industry, e.g. internal verification, advanced HACCP course, etc
3. Conducting and designing more scientific studies to support the lack of scientific judgments in hazard controls
4. Strengthening the HACCP implementation of the traditional product manufacturers and upgrading them to meet the requirements
5. Conducting HACCP audits more frequently in the processing plants, in order to reduce the product sampling and testing
6. Outsourcing the HACCP audit activities to independent bodies that are certified by the DOF. However, before this can be done, standardization of the HACCP audit need to be carried out between the DOF and the nominated subcontractors to establish same standard of audit

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INTRODUCTION

The Ministry of Fisheries of Vietnam (MOFI) with its executive authorities - National Fisheries Inspection and Quality Assurance Centre (NAFIQACEN) and Fishery Resource Protection Department, is the competent agency to control the food safety and quality of fishery products 'from farm, catching, to wholesales'.

On 2 May 2003, the Government of Vietnam issued the Decree No 43/2003/ND-CP on the function, task and organization restructuring of Ministry of

Fisheries. According to this decree, NAFIQACEN and Fishery Resource Protection Department is merged to a new organization called National Fisheries Quality and Veterinary Department (NAFIQAVED). This restructuring purposed to ensure the more effective operation 'from farm to wholesale'. NAFIQAVED is now the competent authority to guide and inspect quality and safety assurance of food industry, in order to ensure the safety of final product and protect the consumers.

FISH PROCESSING INDUSTRY IN VIETNAM

The fishery sector is one of the most important industries in Vietnam. In 2000, it was the fourth largest hard currency earning industry of the country. The fish processing industry has gradually progressed since

then. There is a noticeable increase in the number of fish processing plants and total fish production and export (Table 1).

Table 1. Figure of fish processing establishments and fishery products export, 2000-2003

| No | Detail | Year | | | |
|----|---|-------|-------|-------|--------------|
| | | 2000 | 2001 | 2002 | By June 2003 |
| 1 | Total production (in 1000 metric tonnes) | 2,003 | 2,207 | 2,411 | 1,235 |
| 2 | Export turnover (in million US\$) | 1,402 | 1,760 | 2,014 | 988 |
| 3 | Export volume (in 1000 metric tonnes) | 276 | 359 | 444 | 217 |
| 4 | No. of export-oriented fish processing establishments | 238 | 264 | 279 | 335 |

As shown in Table 1, the total fisheries production was growing from 2,003,000 tonnes in 2000 to 2,411,000 tonnes in 2002. This trend is expected to continue in 2003 as the half-year production has already reached 1,235,000 tonnes. At the same time the number of fish processing factories has been increasing consistently from 238 factories in 2000 to 322 factories by Jun 2003. Some of them are newly established. Most of them used to be small scale and now they are registered as fish processing factories producing fish for export.

The fish processing industry in Vietnam is classified into four main categories, that is, frozen, dried, canned and fermented fish products. Frozen fish product is the largest group, in terms of both volume and number of

fish processing establishments. It makes up 71% of total fishery product export and almost 78% of the total number of total fish processing establishments. The products included in this group are frozen shrimp (raw or cooked), fish (mainly fillets), cephalopods (cleaned, rings), value-added (spring rolls, buttered or breaded) and surimi.

Dried fish product is the second largest group, which makes up to 8% of the total production volume, and 18% of total number of fish processing establishments in Vietnam. Dried fish processing factories are mainly small-scale establishments unlike frozen fish products. Dried fish products include squid, tiny shrimp, anchovy, shark fin and some seasoned products.

Table 2. Number of registered fish processing factory (Column 1) and HACCP- implemented factory (Column 2)

| Type of production | 2000 | | 2001 | | 2002 | | 2003 | |
|--------------------|------|-----------|------|-----------|------|------------|------|------------|
| | (1) | (2) | (1) | (2) | (1) | (2) | (1) | (2) |
| Frozen products | NA | NA | NA | NA | 229 | 112 | 259 | 133 |
| Dried products | NA | NA | NA | NA | 38 | 4 | 59 | 9 |
| Canned products | NA | NA | NA | NA | 7 | 5 | 11 | 7 |
| Fermented products | NA | NA | NA | NA | 5 | 2 | 6 | 2 |
| Total | 238 | 68 | 264 | 78 | 279 | 123 | 335 | 152 |

Canned and fermented fish products are the smallest group, though the volume produced and the number of fish processing establishments has been increasing gradually. However, it will take some time for this category to be a developed sub sector. Recently, canning factories have started to produce canned shrimp and canned swimming crabmeat mainly for export.

Fermented fishery products are normally produced on a small scale. Now, due to the requirements of importing markets, fishery processors are more aware that the implementation of HACCP in their establishments can give them more competitive edge in entering new markets. The export of fermented fish products, such as fermented shrimp, anchovy and fish sauce, is still in the infant stage, though it is growing.

HACCP IMPLEMENTATION IN THE FISH PROCESSING INDUSTRY

Implementation of HACCP is mandatory for factories that export their fishery products to EU and US. There are a growing number of countries which require the fish products exported to their market to be handled, prepared, processed, stored and transported under hygiene conditions and safe for human consumption. This is in line with the application of HACCP in fish processing establishments.

The implementation of HACCP in fish processing establishments is a necessity for a seafood-exporting

country in order to maintain and promote its fishery sector in a competitive world seafood trade. Hence, since 1997, based on the project sponsored by DANIDA, MOFI introduced HACCP to fish processing establishments. Since that time the number of establishments having HACCP plans in place has been increasing. The number of factories that implement HACCP program and approved by MOFI and EU has also increased respectively from 68 to 152 factories and 49 to 94 factories (Table 3).

Table 3. Number of fish processing factories during 2000- 2003

| No. | Indicators | Year | | | |
|-----|----------------------------------|------|------|------|--------------|
| | | 2000 | 2001 | 2002 | By June 2003 |
| 1. | No. of fish processing factories | 238 | 264 | 279 | 335 |
| 2. | No. of MOFI approved factories | 68 | 78 | 122 | 152 |
| 3. | No. of EU approved factories | 49 | 61 | 68 | 94 |
| 4. | Non HACCP plan | 144 | 172 | 157 | 147 |

The implementation of HACCP program in fermented and dried fish products is much slower than frozen and canned. One of the major reasons is lack of experienced and qualified personnel in dried or fermented fish establishments. Hence when those factories intend to apply HACCP program in their establishments, they have to invite the HACCP trainers from NAFIQACEN or VASEP Co. Ltd (Vietnam Association of Seafood Exporter and Producers) to conduct training on HACCP to the managers, quality controllers and line workers based on the training manuals on HACCP program recognized by MOFI.

Amid much slowness, the implementation of HACCP in fermented and dried fish products still continue to grow. The major reason is that the standard requirements for export of these products, even for Asian countries, are getting higher. Importing countries, like

South Korea and China require the fishery products to be processed under hygienic conditions, which is similar to Vietnam's seafood safety procedure that is based on HACCP. This encourages the food processing establishments to develop and implement HACCP programs in their premises.

The assessment and certification of HACCP is carried out by NAFIQAVED based on the regulation on assessment and approval of food safety and hygiene assurance condition for fish products, as regulated in Decision No. No 649/2000/QD-BTS and other standards for food safety. Upon inspection, the inspectors from NAFIQAVED check the establishments' compliance to HACCP and hygiene program to the current regulation and standards. Based on this inspection, the establishment will be graded A to D. A and B-grade establishments have the right to export their products.

On the other hand, C and D-grade establishments are required to improve the facilities and HACCP program as recommended by NAFIQAVED inspectors.

Currently most of the accreditations for HACCP implementation in fish processing establishments are

conducted by NAFIQAVED. However, some fish processing establishments have enlisted third-party accreditation, e.g. SGS from UK and Surefish from US to audit their HACCP plans and systems. Due to their high cost, not many fish processing establishments use third-party accreditation.

OTHER ISSUE

Since the competent authorities in EU, US and other importing countries has been applying a strict control to antibiotic residues in fishery products, such as chloramphenicol (CAP) and nitrofurans (NTR), MOFI and food processing establishments have put a lot efforts to avoid the presence of these antibiotics in fish products. Some measures conducted are as follows:

- MOFI issued the decision No 01/2002/QD-BTS to prohibit the production, trading and use of 10 antibiotic substances in the market, farming, preservation, processing of fishery products
- MOFI assigned its competent authorities, from the central to locals, to monitor and control the import, trading and use of antibiotics in the market, farming, preservation, processing of fishery products
- MOFI invested Gas-chromatography/mass-spectrograph (GC/MS) and Liquid-chromatography/mass-spectrograph (LC/MS/MS) for NAFIQAVED's laboratories and sent the technicians to Netherlands laboratory to learn

the method of detecting CAP and NTR in fish products

- Food processing industries are required to monitor the HACCP application especially at receiving of raw material step and conduct effective measures to ensure the safety of their products
- Food processing industries are required to ensure that their raw material come from approved source and the suppliers have undertaken certain measures that raw materials are free from CAP and NTR

After conducting a series of measures mentioned above, Vietnam has regularly avoided the presence of CAP and NTR in fish products. Based on the action undertaken by Vietnam fishery sector, EU has cancelled the testing requirement of all Vietnam shrimp upon entry of EU market. In addition, EU has also added 32 more Vietnam fish processing establishments into the list of 62 Vietnam factories that have already been approved by EU to export their fish product to EU market.

HACCP TRAINING

MOFI, in cooperation with SEAQIP project, conducted HACCP training courses since 1997, targeted on the fish processing establishments' manager, quality control officers and line workers. Since 2000, HACCP internal audit training courses have

been conducted by SEAQIP to MOFI officers, NAFIQACEN inspectors and fish processing establishments' quality control officers. The number of participants attending those training courses is shown in Table 4.

Table 4. Number of participants of HACCP and HACCP audit training courses

| | 2000 | 2001 | 2002 | By June 2003 |
|---|------|------|------|--------------|
| No. of participants in HACCP training courses | 495 | 700 | 826 | 481 |
| No. of participants in HACCP audit training courses | 28 | 26 | 16 | 3 |

The number of participants in HACCP training courses has been increasing gradually each year due to the rapid growing number of fish processing factories as well as increasing number of the previously non-

HACCP fish processing establishments, which are now aware of the importance of HACCP implementation to their business.

PROBLEMS/ DIFFICULTIES ENCOUNTERED

1. The methods and equipment for determining the harmful substances in fish and fish products are developing rapidly, especially in developed countries. Less developed country like Vietnam is unable to follow this rapid development as fast as its developed counterparts
2. The situation of small-scale production of fishery products from catching, farming to processing makes the problem more complicated. The food processing establishments are still exposed to the risks coming from the presence of hazardous substances in raw material. Government shall spend more time, expenditures and personnel to assist the industry
3. Lack of qualified personnel to develop and conduct HACCP programme in the fish processing establishments
4. The implementation of HACCP in traditional fish product establishments are more difficult than its frozen and canned counterparts, mostly because of the lack of trained workers in traditional fish product establishments
5. Difficulty in developing HACCP programs in traditional fish processing establishments due to lack of risk assessment of traditional fish products

NATIONAL STRATEGY

Vietnam perseveres to introduce HACCP program to fish processing establishments and to implement the relating auxiliary program such as hazardous substance monitoring program in farming fish and fishery products, Good Aquaculture Practices, application of technical standards set up for different types of fishery production. This measure is represented by the annual program for safety and quality assurance of fishery products issued by MOFI. The annual program concentrates on:

1. Promoting the capacity of competent authority - NAFIQUVED both personnel and equipment from the centre to the local level
2. Introducing HACCP and relevant food safety assurance programs to processors, fishermen, fish farmers, traders of both raw materials and end products to ensure the safety and quality of fishery products
3. Controlling and monitoring the implementation of the mentioned programs to protect the consumer both in domestic and export markets
4. Cooperating with regional and international countries to upgrade and improve its capacity in the assurance of the quality and safety of fishery products

CONCLUSION

It has been 10 years since HACCP was first started in the Vietnam fish processing industry after the first project sponsored by UNIDO was carried out and 4 years since the workshop of HACCP Application in Fish Processing Industry in Southeast Asia coordinated by MFRD. The Vietnam fish processing industry has shown a rapid growth on the development of the fishery sectors, both in quality and quantity. Though the importance of

HACCP is greatly acknowledged, its application in Vietnam fish processing industry still faces some hurdles. The Vietnam government will continue to introduce and encourage HACCP implementation to the fish processing industry. More effort, emphasizing on training in internal and external HACCP audit will be conducted for government and fish processing establishments officers.