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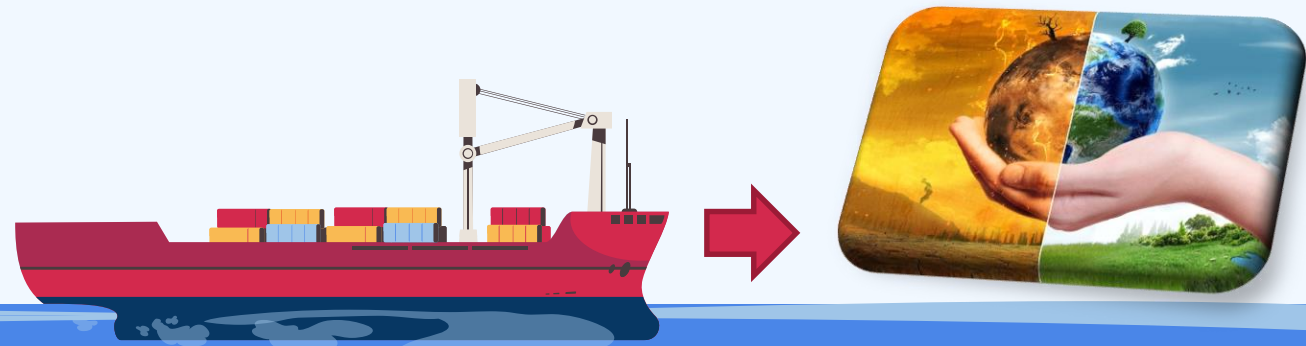
TTIA
สมาคมอุตสาหกรรมทูน่าไทย
Thai Tuna Industry Association



TPFA
สมาคมการค้าอาหารสัตว์เลี้ยงไทย
Thai Pet Food Trade Association

Tuna and Pet Food Industry Outlook :

“Driving business in the climate changed situation”



TTIA's 26 Tuna Processing Members

TPFA's 10 Wet Pet Food Processing Members



SOUTHEAST ASIAN PACKAGING AND CANNING LIMITED



Established in 2013

through

Established in 2019

the 3 policies



Food Safety



Sustainability



Ethical Standard and Human Rights

1. **No Child Labour:** No workers under the age of 18 years old is engaged or employed in the processing plants. Upon recruiting, all applicants shall provide a government-issued passport, identity card and/or work permit for verifying age and legality to work respectively.
2. **No Forced and Compulsory Labour:** Workers are not required to pay deposits or recruitment fee to the company. Recruitment process shall be compliance with Thai law as well as the laws of country of origin. The company shall not lodge passport, Identity card and/or work permit belonging to the workers. The company shall not withhold any part of workers' salary and benefits.
3. **No Discrimination:** The company shall not allow any behavior indicating harassment, discrimination or threatening. Education and training on the fundamental of human rights shall be conducted for all personnel concerning the supervision of workers and security practice. The company shall have in place the mechanism and grievance handling to ensure fair and equal treatment of workers.
4. **No Human Trafficking:** The company shall not involve with any actions that include the recruitment, transportation, transfer, harbouring or receipt of persons, by means of the threat or use of force or other forms of coercion, of abduction, of fraud, of deception, of the abuse of power or of a position of vulnerability or of the giving or receiving of payments or benefits to achieve the consent of a person having control over another person, and for the purpose of exploitation through force labour, modern forms of slavery, slavery and any acts alike.
5. **Labour management and administration:** The company shall establish human resource management policy and operation plan that will ensure the Company's good governance. The policy and plan shall be effectively implemented on an ongoing basis – with a mechanism to handle grievances and complaints from workers, and that minimum wage and overtime work shall be paid to all workers as defined by Thai Law.
6. **Freedom of Association and Right to Collective Bargaining:** As permitted by Thai law, the company shall respect the rights of workers for freedom of association and shall provide channels for workers to exchange their opinions with employers.
7. **Disciplinary Practices:** The company shall not engage in or tolerate the use of corporal punishment, mental or physical coercion, or verbal abuse of workers. Deductions from wages as a disciplinary measure are not allowed.
8. **Occupational health, safety and waste management:** Occupational health and safety of workers shall be of the utmost concern for the company. At minimum, all legal requirements of related laws must be fulfilled. They include to the provision of necessary personal protective equipment at the employer's expenses, first aid treatment, and assistance for follow-up medical treatment. In addition, waste management system shall be established to ensure the mitigation of impact on environment and nearby communities.
9. **Welfare and Benefit:** Social security payments are contributed by both workers and company – in accordance with Thai Labour Law – which ensure all workers are eligible for national health care coverage. The company shall register all workers to this scheme from the first day of employment. For the period where the national health care coverage is not yet in effect, the company shall provide adequate medical treatment and expenses to assist any work-related injuries and illnesses.
10. **Human rights:** The company shall develop and announce its human rights policy and conduct human rights risks and impact assessment, and develop measures to prevent and remedies to human rights impact – which include grievance mechanism for those witness and/or affected.

TOPICS

1

Thai export of canned tuna and pet food

2

Driving business in the climate changed situation

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Opportunity and Challenge



Thai Exports of Tuna Products to Major Markets in 2020-2022

Unit: Million USD

Ranking	Main Markets	2020	2021	2022	% Growth	% Share 2022
1	U.S.A.	674	436	554	↑+27	24
2	MIDDLE EAST (15)	385	319	415	↑+30	18
3	AFRICA	320	331	386	↑+16	17
4	AUSTRALIA & OCEANIA	203	194	246	↑+27	11
5	JAPAN	212	207	218	↑+6	10
	LATIN AMERICA	212	125	129	↑+48	6
	EU (28)	100	62	67	↑+4	3
	OTHERS	268	244	269	↑+8	12
	WORLD	2,373	1,918	2,284	↑+10	100



Source : www.moc.go.th Prepared by : Thai Tuna Industry Association





TPFA

สมาคมการค้าอาหารสัตว์เลี้ยงไทย
Thai Pet Food Trade Association

Thai Exports of Pet Food (Dog or Cat) Products to Major Markets in **2020-2022**

Unit: Million USD

Ranking	Main Markets	2020	2021	2022	% Growth	% Share 2022
1	U.S.A.	463	622	807	↑+30	33
2	EU (28)	279	318	371	↑+17	15
3	JAPAN	281	305	315	↑+3	13
4	AUSTRALIA & OCEANIA	107	144	173	↑+20	7
5	MALAYSIA	106	147	154	↑+5	6
	MIDDLE EAST (15)	23	34	47	↑+38	2
	OTHERS	399	504	594	↑+18	24
	WORLD	1,658	2,074	2,461	↑+27	100

Source : www.moc.go.th Prepared by : Thai Pet Food Trade Association



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Canned tuna and Pet food trade statistics

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Driving business in the climate changed situation

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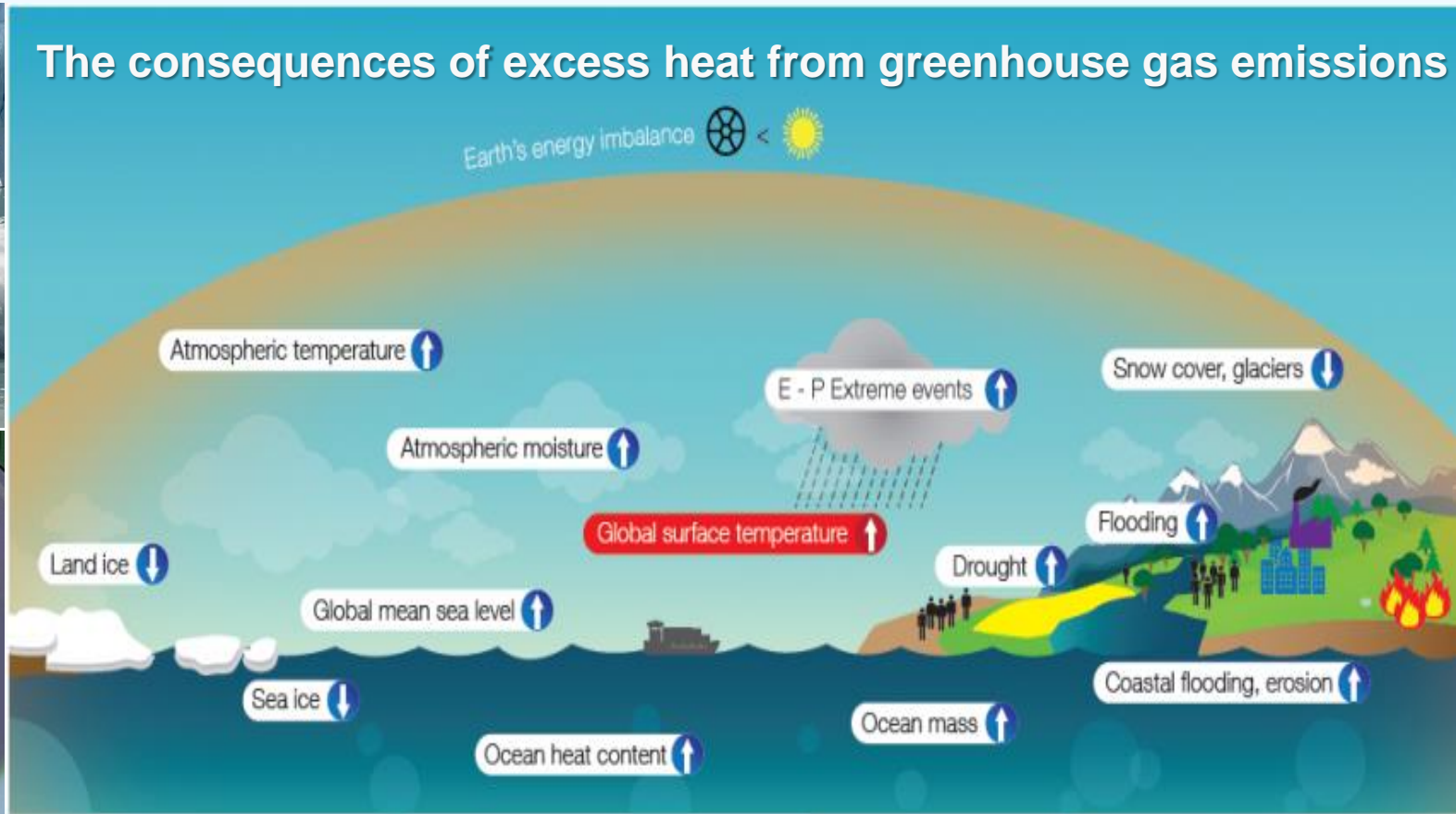
Opportunity and Challenge



Effect of Climate Change !

Ocean warming

- The ocean absorbs most of the excess heat from greenhouse gas emissions, leading to **rising ocean temperatures**.
- Increasing ocean temperatures **affect marine species and ecosystems**, causing coral bleaching and the loss of breeding grounds for marine fishes and mammals.
- Rising ocean temperatures also **affect the benefits humans derive from the ocean**; **threatening food security**, increasing the prevalence of diseases, causing more extreme weather events and the loss of coastal protection.



Source: <https://www.iucn.org/resources/issues-brief/ocean-warming>

Plastic Pollution !



Turning off the Tap
How the world can end plastic pollution and create a circular economy



Rivers and lakes carry **plastic waste** from deep inland to the sea, making them major contributors to **ocean pollution**. It can persist in the environment for centuries.

How can the world beat plastic pollution?

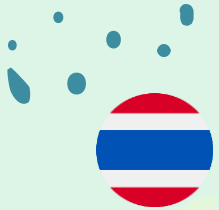
A systems change is needed to address the cause of plastic pollution.

It combines reducing the most problematic and unnecessary plastic uses with three market shifts – **Reuse, Recycle, and Reorient** and Diversify – and actions to deal with the plastic pollution legacy.



Ocean Of Plastic

The world is waking up to the problem.
 Governments, industry and other stakeholders are starting to act.



SUSTAINABLE DEVELOPMENT GOALS

17 GOALS TO TRANSFORM OUR WORLD



SDG 13 Climate Action

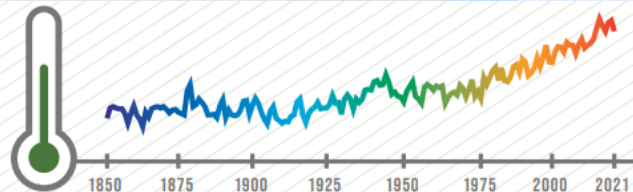
SDG 15 Life on Land
 SDG 14 Life Below Water



CLIMATE CHANGE

IS HUMANITY'S "CODE RED" WARNING

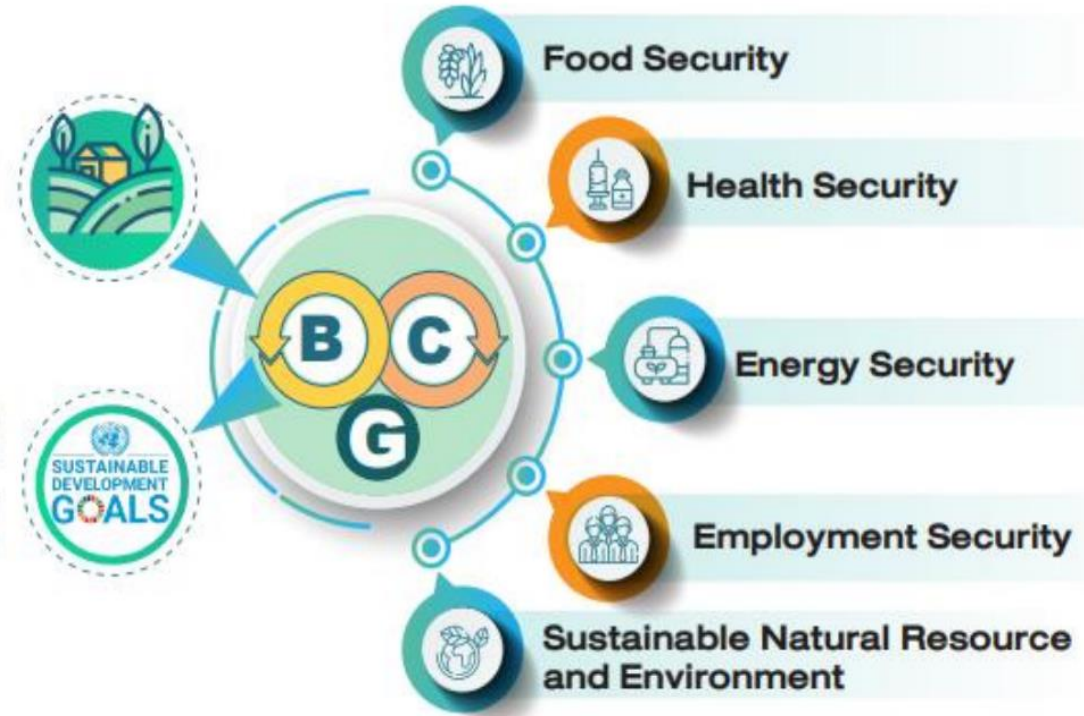
RISING GLOBAL TEMPERATURES
 CONTINUE UNABATED, LEADING
 TO MORE EXTREME WEATHER



BCG Model : Fostering Sustainable Development in Thai Economy

Principle:
 Sufficient
 Economy
 Philosophy

Goal:
 Sustainable
 Development
 Goals (SDGs)



- **Bioeconomy** involves the production of renewable biological resources and the conversion of these resources into value added products
- **Circular economy** aims at reusing and recycling resources
- **Green economy** determines to keep economy, society and the environment in balance, leading to sustainable development.

Responsible business in the era of the Sustainable Development Goals

Only environment protection is not sufficient for the company.
The company has to incorporate environment with social and governance.



Promoting ESG adoption throughout the investment value chain can create long-term value for business and society.



ENVIRONMENTAL

- Climate change
- Circular economy
- Biodiversity
- Deforestation



SOCIAL

- Human rights
- Decent work
- Diversity, equity, and inclusion



GOVERNANCE

- Board structure
- Executive remuneration
- Tax fairness
- Responsible political engagement



THE BIO-CIRCULAR-GREEN (BCG) ECONOMY MODEL FOR SUSTAINABLE DEVELOPMENT



Driving

Bio Economy

Tuna Broth

Tuna extract

Increase protein and more palatability

Indirect benefit
Reduces the use of microorganisms to digest fats and proteins in wastewater

Wastewater treatment

Circular Economy

Tuna red meat

Tuna offal

Pet Food

Crude Tuna oil

Fish Extract

Fish oil

Fish meal

Feed Industry

Tuna waste

Green Economy

Packaging is made from natural materials, bioplastic pouch, can, glass

Solar roof top

Prosthetic legs made from aluminum ring pull of cans.

The Tuna industry has created value-added products from its food loss and food waste to produce premium grade pet food.

In 2023, we will focus on bringing BCG to the tuna industry and pet food industry as much as possible.

Thailand has strengths in the supply chain that can be created further value added by utilization of BCG principle.

Promoting SDG 8, incorporation with ILO and Civil Society



Good Labour Practices (GLP)



International Labour Organization

SHIP TO SHORE RIGHTS | SOUTH EAST ASIA

Social dialogue workshop with Civil Society

The aim is to enhance the effectiveness of the **Welfare Committee** and **Grievance Mechanism** or Worker Voice.



GLP divided into 6 items:

1. Forced Labour and Recruitment
2. Child Labour
3. Freedom of Association, Collective Bargaining and Workplace Cooperation
4. Non-Discrimination
5. Wages, Compensation, and Work Hours.
6. Occupational Safety, Health and Worker Welfare and Community Engagement



ILO GLP was created by public and private cooperation (ILO, Ministry of Labour, TFFA and TTIA) We organize annual GLP visit activity to monitor GLP implementation in tuna factories of members



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Opportunity and Challenge



1. Policy and legislative changes required in the way to encourage business action to implement in accordance with SDG, BCG, ESG.,etc. For example, tariff and tax measures.

2. Market transformations: Creating the marketplace for the new circular plastics economy.

3. Seafood security : Straight forward to ocean warming and its impact on fish stocks and fishery management for balancing fish catch potential through the mechanisms of RFMOs with scientific evidence.

-- Highlight and cooperating to solve the micro plastic in ocean.



Thank you



www.thaituna.org



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