

添付資料 企業ミーティング講演資料



Research and Analysis of Overseas Agriculture and Trade
Investment Environment
Saudi Delegation Tour in Japan Program

～ Corporate Meeting ～

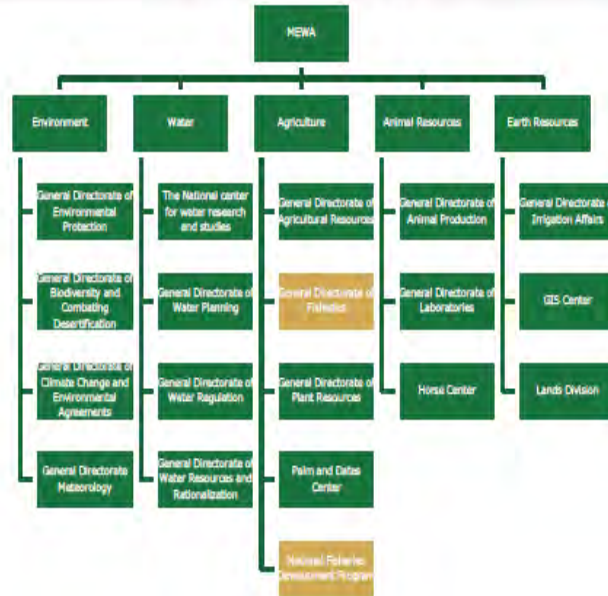
4th December, 2019





Ministry of Environment, Water and Agriculture

Institutional Framework



Ministry of Environment, Water and Agriculture

Sister Entities





Ministry of Environment, Water and Agriculture

The Minister



Abdulrahman Abdulmohsen A. AlFadley holds a bachelor degree in Chemical Engineering from King Saud University. He was appointed as the Minister of Agriculture in 15 January 2015.

In May 2016, a Royal Decree was issued to change the name of the Ministry to the Ministry of Environment, Water and Agriculture. Thereupon, AlFadley became the Minister of Environment, Water and Agriculture.

In his capacity as the Minister of Environment, Water and Agriculture, Al-Fadley is currently the Chairman of the Saudi Arabian Grains Organization (SAGO), Irrigation and Drainage Authority, Agricultural Development Fund, the General Authority of Meteorology and Environmental Protection, Saudi Wildlife Authority, S



Ministry of Environment, Water and Agriculture

Deputy Minister of Agriculture



The Deputy-Ministry for Agriculture was established in 1384H and is responsible for providing agricultural extension and plants protection services. Currently **Mr. Ahmed Alayadha** is the deputy minister of Agriculture. The department aims at promoting the qualification level of people working in the agricultural sector and encouraging them to use modern technologies to increase production and decrease costs. This in turn will lead to increasing farmers' income and improving their living conditions.

1. Achieving optimal use of water and agricultural resources through the use of modern irrigation methods and technologies in crops production;
2. Providing advanced agricultural services;
3. Providing safe and healthy food products;
4. Activating partnerships with the relevant authorities and the private sector.



Ministry of Environment, Water and Agriculture

General Directorate of Fisheries & The National Fisheries Development Program



Dr. Ali Al Shaikhi leads the General Directorate of Fisheries & is the CEO of the National Fisheries Development Program.

The objective of the department is to preserve, develop, protect and ensure the proper use and exploitation of fish resources.

Dr. Ali Alshaikhi obtained his Ph.D in Human Resources Management from Hillford University in 2013. He was appointed as the Director General of the general directorate of fisheries at the Ministry of Environment, Water and Agriculture (MEWA) since 2016, in addition to his role as the CEO of National Fishery Development Program (NFDP) where he has worked to introduce new and effective policies, upgrade the aquaculture technology, implement environmentally sustainable programs and fund research into the future growth of the sector.



Vision 2030

Role of Aquaculture

رؤية 2030
VISION 2030
المملكة العربية السعودية
KINGDOM OF SAUDI ARABIA

PROTECTING OUR VITAL RESOURCES
We will continue to build safe and sufficient strategic food reserves, to better guard against emergencies. **Aquaculture** will be promoted, as will strategic partnerships with countries blessed with natural resources such as fertile soil and water reserves.



MY FIRST OBJECTIVE IS FOR OUR COUNTRY TO BE A PIONEERING AND SUCCESSFUL GLOBAL MODEL OF EXCELLENCE, ON ALL FRONTS, AND I WILL WORK WITH YOU TO ACHIEVE THAT...

Custodian of the Two Holy Mosques
King Salman Bin Abdulaziz Al-Saud



Ministry of Environment, Water and Agriculture

The National Fisheries Development Program



National Fisheries Development Program

البرنامج الوطني لتطوير قطاع الثروة السمكية



The National Fisheries Development Program (NFDP) in the Kingdom of Saudi Arabia, which was approved by Resolution No. 514 Date 23 /11/1436 H of the Council of Ministers and supervised by the Ministry of Environment, Water and Agriculture, is a comprehensive national strategy aimed at becoming the wealth sector Fisheries is one of the largest development sectors contributing to the achievement of balanced and comprehensive and sustainable development in the Kingdom of Saudi Arabia

- Realize sustainable development and enhance the fisheries sector contribution in GDP
- Covering the Kingdom's marine food needs, contributing to food security, and increasing the production of value-added seafood projects.
- Increase the productivity of the aquaculture sector to (600) thousand tons during (15) years to 2030 in stages:
 1. First five years 2016-2020 100,000 Tons / year
 2. Second five years 2021 – 2025 300,000 tons / year
 3. Third five years 2026-2030 600,000 tons / year
- Saudization of areas of partnership with the private sector to attract targeted investments for the establishment and diversification of aquaculture projects, feed mills, fish processing plants and other facilities associated with the sector.



Ministry of Environment, Water and Agriculture

The National Fisheries Development Program



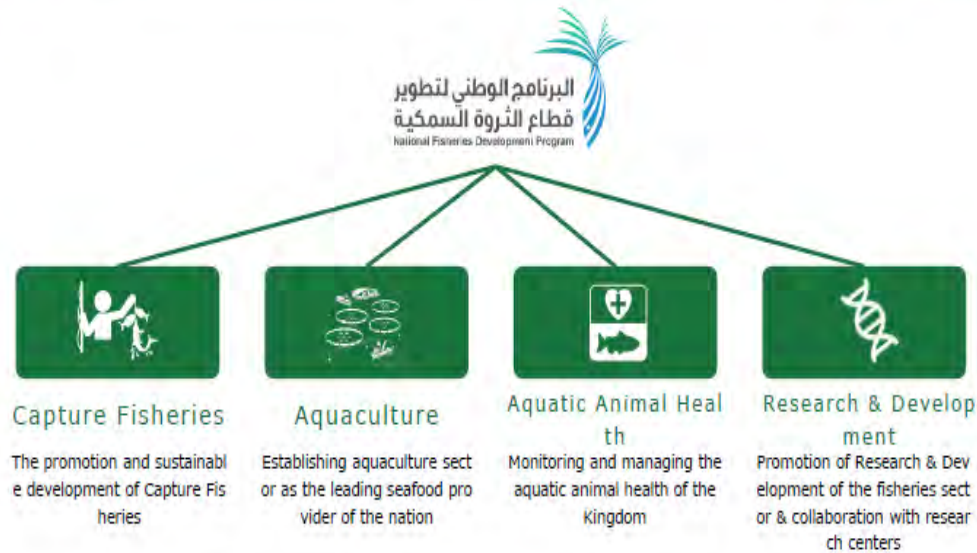
VISION

The National Fisheries Development Program (NFDP) of the Kingdom of Saudi Arabia, is a comprehensive national strategy aimed at enabling the Fisheries sector to become sustainable and essential to the food security in the Kingdom of Saudi Arabia.



National Fisheries Development Program

Scope of Work



Objectives





National Fisheries Development Program

Changing the sector



Previous Regulations

- ◆ Investment in aquaculture
 - A lot of red tape, with licensing process taking up one and a half year
 - Multiple entities in the process meant disorganization
- ◆ Weak environmental monitoring
- ◆ Lackluster follow-up on projects
 - Once licensed was issued there wasn't project development follow-up
 - No assistance provided with obstacles

Current and Future Regulations

- ◆ Streamlined investment procedures
 - One-stop shop for aquaculture investment
 - For local investors through NFDP
 - For international investors through SAGIA
 - Reducing the licensing time
- ◆ Better environment monitoring
 - Establishment of standardized environment monitoring
 - Dedicated unit
- ◆ Coordination with investors
 - Follow-up with investors
 - Assistance with technical obstacles



Changing the Sector

The NFDP is working hard on changing the sector, reducing its red tape and streamlining bureaucratic procedures

- 01 Effective Policies
Introduction of investor friendly policies
- 02 Ease of operation
Revising strict overseeing rules
- 03 Enabling operation
Providing assistance where possible to the projects
- 04 Ensuring Biosecurity
Implementing strict Biosecurity programs

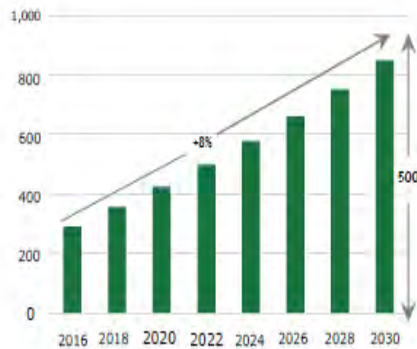


National Fisheries Development Program

Aquaculture growth

KSA seafood consumption to grow at 6% per year until 2030...

...driven by increase in population and per capita seafood consumption



KSA population growing at a rate of 2% per year



KSA per capita seafood consumption to grow by 6% until 2030 to reach current global average of 20kg



Red Sea – A Competitive Edge

The Red Sea has favorable and diversified environmental and climatic conditions for Aquaculture



Long coastline

~ 2,400 km



Suitable cage depth

20 to 50 m



Pristine water and adequate DO

7.04 mg/l



Low wave heights

0.5 to 1 m



Adequate salinity

34 to 41 PPT depending on location



Suitable water temperature

18 to 30°C



Aquaculture Species



- Mediterranean Seabream
- *Sparus aurata*



- Tilapia
- *Oreochromis niloticus*



- Red Sea White shrimp
- *Litopenaeus vannamei*



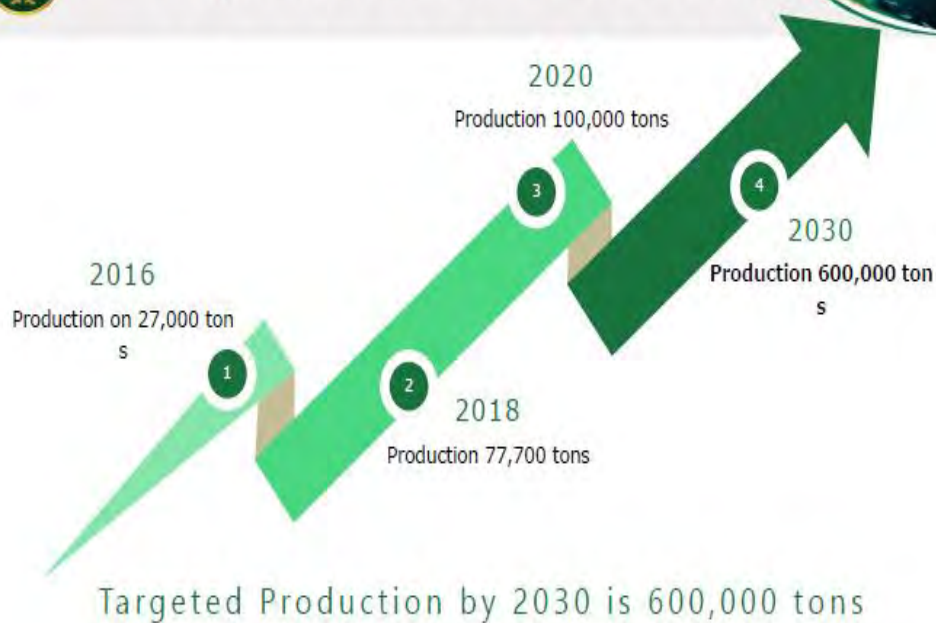
- Red Sea Seabass
- *Lates calcarifer*



- Meagre
- *Argyrosomus regius*



Aquaculture Production





Fisheries in the Kingdom

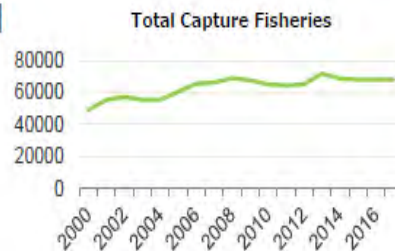
Local Sustainability



70k Maximum Sustainable Yield

The National Fisheries Development Program has set the target for the maximum capture of fisheries as 70k tons per year from the Red sea and Arabian Gulf. This limit represents the maximum sustainable yield, anything above this limit will be counted as overfishing and may lead to depletion of the local stock.

Red sea 2017	Arabian Gulf 2017
26,016	41,987
3784 Indian mackerel	7117 Green tiger prawn
2144 Emperors	3808 Blue swimming crab
2016 Spanish mackerel	2964 Spanish mackerel
1426 Trevallie	2939 Redspot emperor
Tons	Tons



68,000

Tons Total
Fisheries Capture
2017

Source: National Fisheries Development Program - Team Analysis



Aquaculture in the Kingdom

Export Analysis



Export of Aquaculture products

Majority of the export of aquaculture Products is to the neighboring GCC Countries. With some export to the USA And Europe. But recently their has be a increase in export to China for Saudi Shrimp due to the fact that the demand For seafood in China is one of the biggest.

The market for aquaculture products is very Competitive and based on standardized testing And approval certifications.

60
%
Of aquaculture products
exported



Source: Fisheries Statistics of Saudi Arabia - MEWA



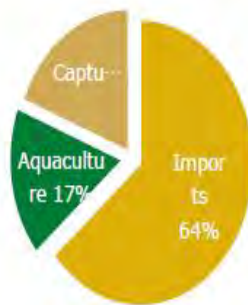
Aquaculture in the Kingdom

Food Security - Analysis



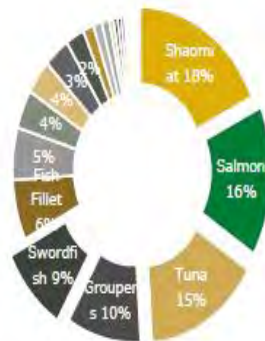
Total Seafood Consumption

356,539 MT



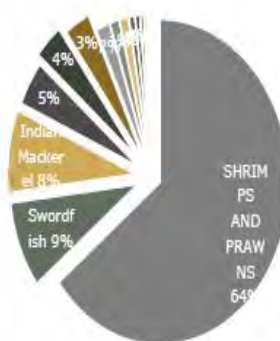
Total Seafood Import

227,610 MT



Total Seafood Export

62,091 MT



Source: MEWA Team Analysis - Data for the year 2017



Safety & Quality Drivers



Best Aquaculture Practices

The Kingdom is on track to become the first nation to be BAP certified in the world. Ensuring that the Best Aquaculture Practices are implemented across the board.

Aquaculture Biosecurity

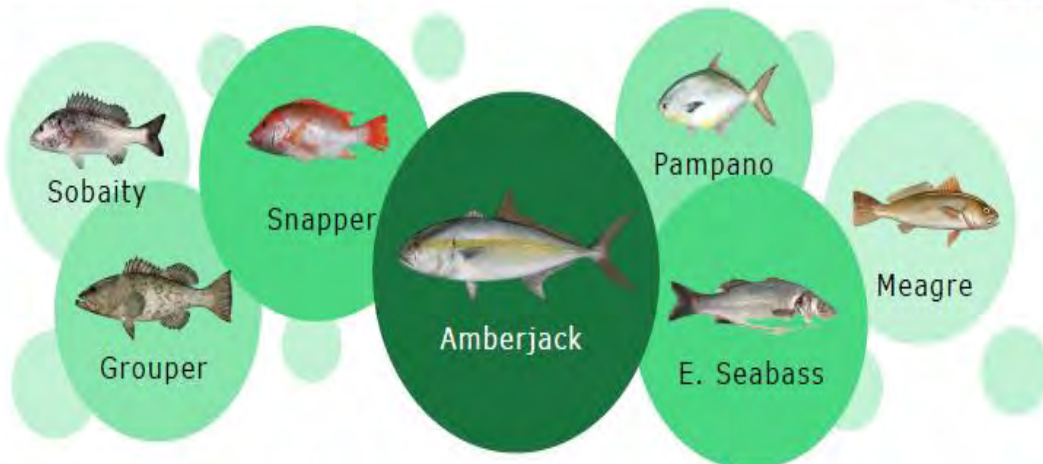
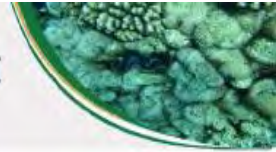
The Kingdom's aquaculture production is safeguarded with a very strict Biosecurity program, which is a global case study in its implementation.

SAMAQ Certification

To highlight and promote the local aquaculture production, MEWA with the local aquaculture society launch the SAMAQ certification Program. Based on strict auditing it guarantees the farm is following best aquaculture practices.



Research & Development



Research & Development is already underway through KAUST and Beacon Development company into increasing the FCR of existing species and developing best practices for domesticating 7 new species



5



Aquaculture Investment



Ready to invest

We have worked with existing projects in the Kingdom to understand their bottlenecks and developed greenfield project locations as well for potential investors

Seafood Processing Plant

Working with our partner MODON, we have worked to create special zones for any investor to utilize for a seafood processing plant

Public private Partnership

Government is working hard to develop the aquaculture sector is open to partner with a private entity to join and develop hatcheries, feed mills or processing plants



Greenfield Aquaculture Investment opportunities



Province Site No. Location

Tabouk	1	Duba
	2	Omloj
Madinah	3	Yanbu
	4	Yanbu
	5	Arrayis
	6	Mastorah
	7	Mastorah
	8	Mastorah
Makkah	9	Rabigh
	10	Al Muzaylif
	11	Al Muzaylif
	12	Al Muzaylif
	13	Al Qunfudah
Aseer	14	Saeedat Al Sawaleha
Jazan	15	Al Sumairat



Brownfield Aquaculture Investment opportunities



Tharawat Seas



- Licensed Capacity: 10,000 Tons
- Products: Mediterranean Sea bream, European sea bass, Marine tilapia

Al Refaei Fish Farm



- Licensed Capacity: 600 Tons
- Products: Vannamei shrimp, Sea bream, Seabass

Red Sea Aquaculture (RSACO)



- Licensed Capacity: 3,250 Tons
- Products: Vannamei shrimp

Island Prawn Company



- Licensed Capacity: 5,000 Tons
- Products: Vannamei shrimp

Jazan Energy & Development Company



- Licensed Capacity: 3,600 Tons
- Products: Vannamei shrimp

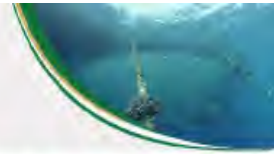
Marsa Rabigh For Plant Production



- Licensed Capacity: 2,000 Tons
- Products: Shrimp and fish



Brownfield Aquaculture Investment opportunities



Saudi Coasts Company



- Licensed Capacity: 2,000 Tons
- Products: Vannamei shrimp and Fish



Aquaculture Sharq Farms Company



- Licensed Capacity: 7,600 Tons
- Products: Vannamei shrimp and Fish



Saudi Fisheries Company



- Licensed Capacity: 20,000 Tons
- Products: Vannamei shrimp and Fish



Estazra Alwatan



- Licensed Capacity: 4,000 Tons
- Products: Vannamei shrimp



Arabian Sea Bounties Holding Co



- Licensed Capacity: 2,000 Tons
- Products: Vannamei shrimp and Fish



Msturah Company For Agriculture



- Licensed Capacity: 4,000 Tons
- Products: Vannamei shrimp and fish



Food Processing Seafood Processing



Food Processing Cluster

Specialized zones for the development of food processing plants, including seafood processing.

Investment Advantages

Industrial land rent starting from SR. 1 per square meter. Rates of land and basic services such as electricity, water and fuel within the industrial cities are a stimulation for industrial investment

Integrated Services

Integrated infrastructure and continuous development for more services (water, advanced communications network, industrial security, government services, commercial complexes, residential complexes).





Public Private Partnerships



Feed mills

To ensure that increased production has adequate feed availability the government is looking to establish specialized feed mills

Hatcheries

To localize the value chain of aquaculture the government is investing the development of national hatcheries

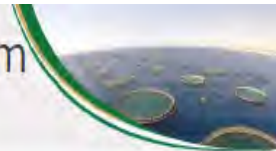
Processing Plants

With cooperation of MODON the government is investing in the development of seafood processing the plant to diversify the output of aquaculture



Aquaculture in the Kingdom

Sustainability and Environmental impact



Low Environmental Impact
Low risk to the environment, with most impact local and temporary. In some cases, aquaculture can benefit the environment.

Food of the future
Farmed fish and shellfish production is set to soar between 2010 and 2050 in order to meet projected fish demand worldwide.

Protection of the Wild
As maintaining ~~Stock~~ health and wild fish stocks is a major concern, aquaculture will likely play a significant role in mitigating this concern.



A Better Protein Source

Fish are more efficient at converting protein than even chickens.

Better FCR is about seven times more efficient than raising cattle, about three times more efficient than raising pigs, and about one and a half times more efficient than raising chickens.

Disease Free
No contamination from pesticides, herbicides, heavy metals or harmful chemicals

Source: FAO, NOAA, MEWA, NFDP



Change Snapshot



Market Management

- Educating SFDA & Municipalities
- National Center for Seafood quality
- Marketing Campaign to increase awareness of local seafood (3 years)
- SAMAQ support

Post-Production

- Cold Chain logistics
- Processing plant development (MODON)
- Export trade routes
- Local market access

Monitoring & Support

- Biosecurity Program
- Education Program (Bachelors & Technical diplomas)
- International Expertise
- R&D centers

Legislative

- Easier Licensing Procedures
- Easier environmental regulations
- Extensive Funding options
- Import Regulations

Pre-Production

- Specialized feed mills
- National Hatcheries
- Broodstock Program
- Genetics & Domestication programs