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ADDENDUM TO *THE STATE OF WORLD FISHERIES AND AQUACULTURE 2020*

SUMMARY OF THE IMPACTS OF THE COVID-19 PANDEMIC ON THE FISHERIES AND AQUACULTURE SECTOR

The 2020 edition of *The State of World Fisheries and Aquaculture* was completed as the coronavirus disease (COVID-19) pandemic spread around the world. Therefore, the publication makes reference to, but does not address the impacts of, the pandemic on the sector. This addendum is intended to capture these rapidly evolving impacts, and provide a baseline for interventions and policy advice.

Although COVID-19 does not infect aquatic species (Bondad-Reantaso *et al.*, 2020), it has affected the fisheries and aquaculture food systems like no other shock before. The protection measures taken by governments to contain the spread of the disease, while necessary, have impacted each step of the seafood supply chain, from fishing and aquaculture production, to processing, transport, and wholesale and retail marketing. Yet, in this period of global pandemic, fish¹ remains an essential source of animal proteins, micronutrients and omega-3 fatty acids, which are vital in low-income food-deficit countries (LIFDCs) and Small Island Developing States (SIDS), where diets are heavily reliant on fish.²

¹ The term “fish” indicates fish, crustaceans, molluscs and other aquatic animals, but excludes aquatic mammals, reptiles, seaweeds and other aquatic plants.

² Of the 34 countries where fish contributes more than one third of total animal protein supply, 18 are LIFDCs, and 5 are SIDS, where fish serves as the backbone to healthy diets.

It is therefore important that these countries continue to have access to fish products.

Protecting each stage of the fisheries and aquaculture supply chain

In addition to being important for the livelihoods of many fish-dependent communities, fish and fish products are among the most highly traded food products in the world, with 38 percent of total fish production entering international trade. The measures necessary to contain the spread of COVID-19 have caused disruption in all segments of both domestic and international supply chains. Protecting each stage of the supply chain is fundamental to avoid global and local food crises, and protect fish-dependent economies.³

Fishing activity reduced

Fishing activities have decreased in both artisanal and industrial sectors during the pandemic. According to Global Fishing Watch, global industrial fishing activity had fallen globally by about 6.5 percent as at the end of April 2020, compared with previous years, as a result of restrictions and closures related to COVID-19 (Clavelle, 2020). Limited supplies

³ In the area of international trade, in a joint effort to ensure that trade flows continue to be as free as possible, the heads of FAO, the World Trade Organization (WTO) and the World Health Organization (WHO) have called for the prevention of disruptive border restriction measures on trade in food to avoid food shortage, emphasizing that the dissemination of information on food-related trade measures is fundamental.

(e.g. ice, fuel, gear and bait), due to suppliers being closed or unable to provide inputs on credit, have also constrained fishing activities. Labour shortages have also had a severe impact on fishing activities, particularly where crews are made up of migrant workers. As a consequence, their families in home countries are having to cope with the reduction or halting of remittance flows (World Bank, 2020). Recently, in some regions, signs of improvement have been evident in some fisheries (e.g. changes in target species and in marketing strategies in line with changes in demand), with some small-scale fisheries potentially adjusting more quickly to market demand.

Varied impacts in aquaculture production

Effects on aquaculture have varied with regions, species, markets and financial capacity of farms. Following disruptions, many farmers who have been unable to sell their harvest have had to maintain large quantities of live fish. Others have not been able to complete all necessary seasonal tasks such as fish breeding. This has increased costs and risks, in particular when the supply of inputs has also been disrupted, and it is also likely to delay restocking and subsequent harvests. Species grown for export have been severely affected by the disruption of international transport. Although some government or financial institutions have provided financial support, the risk of bankruptcy remains. However, preliminary projections by a few companies indicate that they may have the capacity to recover once the crisis eases.

Aquaculture farms supplying the live-fish market or high-end food services (i.e. restaurants, tourism and hotels) have also been dramatically impacted. Their capacity to recover will depend largely on their ability to re-direct their sales to other markets, especially supermarkets and retail, including their use of digitization tools, which have emerged as a major innovation during the crisis.

Small and medium-sized enterprises and farms are struggling with cash-flow issues, as the crisis has not only slashed their incomes but also created new expenses associated with the cost of maintaining live stocks in production facilities.

The availability of labour and aquaculture inputs needed for production (e.g. medicines, fingerlings and feed) have also been impacted by restrictions on cargo movements, precautionary measures and borders closures. Input suppliers could feel the main impact in the coming months as businesses may close their operations or delay restocking.

Processors, markets and traders adjusting to demand

The main adverse effects are for producers supplying the food services sector, e.g. hotels, restaurants and catering. Some have started direct sales and delivery service to households in an effort to compensate for lost hotel and restaurant demand. Exports have been severely affected owing to transport disruptions. However, food retail sales have remained stable or increased for frozen, canned, marinated and smoked fish with a longer shelf-life.

Processing has been affected by worker health issues and labour shortages due to COVID-19 illness and quarantining of staff. Changes in demand are also affecting storage, resulting in increased food loss and waste. Many wholesale and retail fish markets are often congested and crowded, presenting risks to traders, most of whom are women, as well as to consumers, who take significant risks to maintain their livelihoods and to buy fresh fish to eat.

It is important to highlight the fact that informal supply chains are facing greater impacts due to the lack of formal contractual relationships (no established cold chain or insurance, among others). Another consequence of the virus outbreak, linked to global trade, is the cancellation of key seafood trade events across the world.

Problems in working conditions, especially for women and other vulnerable workers, along the supply chain

While some small-scale fisheries have been able to adapt (e.g. providing direct sales to consumers), in general small-scale fishers and fishworkers have been hit hardest because they

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lack capital to weather the storm, depend on fishing for their daily income/food, and do not have access to health services, among other reasons. In some parts of the Mediterranean and the Black Sea, more than 90 percent of small-scale fishers have been forced to stop fishing during lockdowns, despite being a primary food production sector, as they have been unable to sell their catches and/or as the prices of fish have dropped below a profitable level (Euronews, 2020). Women, who represent 50 percent of the labour force in fisheries and aquaculture,⁴ have been particularly affected by reduced landings and the closure or reduction of processing and marketing activities (CFFA, 2020). In addition, fishers, and fish processors and vendors (many of whom are women), are exposed to a greater risk of infection, as they have close contact with others at all stages of the value chain (CFFA, 2020). Moreover, the widespread informal activities in the sector constitute an added barrier for fishers, women fishworkers and fish farmers in accessing protection offered under labour market policies and contributory social protection mechanisms.

Working conditions and the safety of fishers in both small and industrial sectors have been affected owing to having to work longer periods, which increases fatigue and stress. However, this health crisis does present an opportunity to address and improve the working and sanitary conditions of these most vulnerable groups, with a particular focus on young people and women, who experience an increased burden of work and higher incidence of gender-based violence.

Management and policies

The impacts of COVID-19 have affected fisheries management processes. Some fish assessment surveys have been reduced or postponed, obligatory fisheries observer programmes have been temporarily suspended, and the postponement of science and management meetings will delay implementation of some necessary measures, and the monitoring and enforcement of these measures.

⁴ This figure increases when the secondary sector is taken into consideration (e.g. up to 80 percent in shrimp-processing factories in Bangladesh).

A lack of monitoring and enforcement may encourage a less responsible level of management, monitoring and control of fishing operations and there is a risk that levels of illegal, unreported and unregulated (IUU) fishing will increase. Crew safety is an additional concern. However, the crisis has triggered unprecedented responses by governments across the world. Policies and actions taken include measures to protect public health, to safeguard fishers' and fishworkers' safety,⁵ and to strengthen social protection to support the most vulnerable and avoid a socio-economic crisis. Social protection measures relate to social assistance (e.g. cash transfers), social insurance (e.g. health insurance) and labour market programmes (e.g. unemployment benefits), and steps to ensure the continuity of food supply.

What FAO is doing

FAO's first objective is to ensure food security and nutrition for all. In response to the COVID-19 pandemic, the Organization has led an unprecedented response that includes: dedicated COVID-19 pages on the FAO website, with targeted analysis and solutions across food value chains, sectoral and cross-sectoral policy briefs, advice on planting and harvesting plans.

FAO also hosts weekly COVID-19 planning meetings with regional and subregional offices, and holds regular meetings with Members to update them on the state of and responses to the pandemic.

In addition, the FAO Director-General continues to brief national leaders and decision-makers as well as the broader community through interventions within international fora such as the G20, the World Economic Forum, and the United Nations Economic and Social Council (ECOSOC), and by participating in various international exchanges and through bilateral meetings with Members.

⁵ Such measures include, for example, closing open-air fish markets, disinfecting ports and fishing boats, and enforcing sanitary measures among fishers, fishworkers and aquaculture farmers (e.g. washing hands, ensuring social distancing, wearing gloves).

In the context of fisheries and aquaculture, the response from FAO has been primarily focused on supporting, restarting and strengthening the sector's supply chains and livelihoods, while focusing on the most vulnerable groups and regions. To facilitate this work, the Fisheries and Aquaculture Department established a dedicated COVID-19 Task Force to coordinate departmental initiatives in response to the pandemic and provide coordinated support to measures and interventions addressing the impact of COVID-19 on fisheries and aquaculture. To this end, FAO's recent and ongoing actions include:

- ▶ Developing policy briefs on the impacts of COVID-19 on the sector and policy response (FAO, 2020a), as well as a Q&A to address the most urgent information needs (FAO, 2020b).
- ▶ Working with Members, industry and civil society representatives, and other stakeholders to monitor the situation and provide policy, management and technical advice, as well as technical support to innovate and adapt practices along the supply chain.
- ▶ Coordinating information and responses with international and regional partners, such as regional fishery bodies (FAO, 2020c), intergovernmental economic organizations, research centres and civil society organizations.
- ▶ Continuing to improve its understanding of the virus, to assess any potential risks to global, regional and national food systems – as new information and knowledge become increasingly soundly based (on, for example, international standards, expert opinion, peer-reviewed studies) – and to mobilize resources for coordinated COVID-19 mitigation measures.
- ▶ Working with financial institutions and donors to develop comprehensive and coordinated intervention packages to address the most urgent priorities to reactivate supply chains.

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