



Food and Agriculture
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Agenda item 4

State of World Fisheries and Aquaculture: SOFIA 2018

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COFI/2018/2

COFI ● ● ●

9–13 July 2018

#COFI33



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The State of World Fisheries and Aquaculture 2018



Key facts & figures

Global total **capture fishery production** in 2016 was **90.9 million tonnes**.

33.1% of fish stocks are estimated as **overfished** (fished at biologically unsustainable levels).

Global total **aquaculture production** of aquatic animals in 2016 was **80.0 million tonnes**.

Fish consumption has increased from **9 kg** per capita in 1961 to more than **20 kg** per capita today.

Fish trade was valued at **US \$143 billion** in 2016.
World fish supply reached a record high of **20.3 kg per capita** in 2016.

Women account for **14%** of all people directly engaged in primary sector of fisheries and aquaculture.

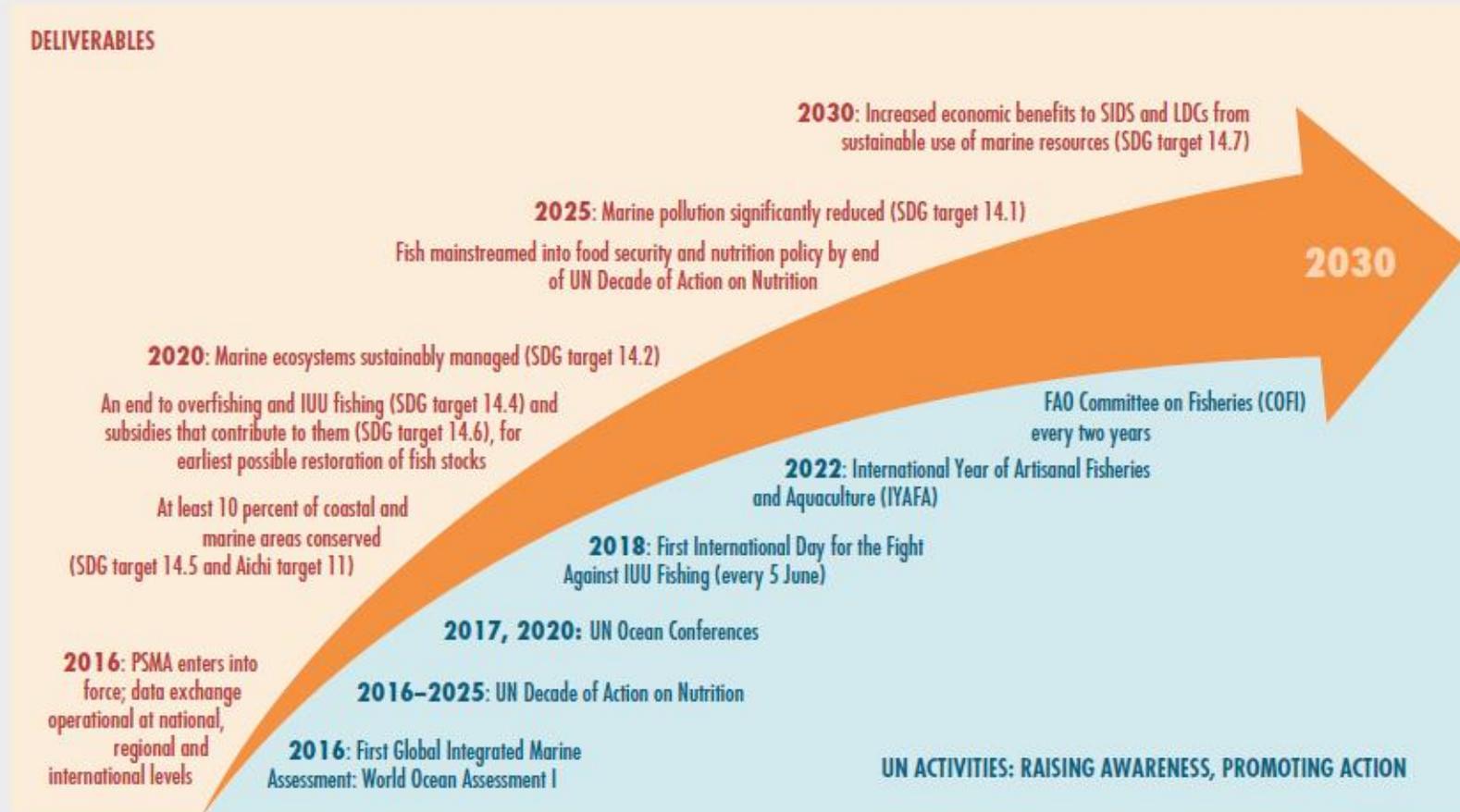
SOFIA 2018 highlights the critical importance of fisheries and aquaculture for the **FOOD, NUTRITION AND EMPLOYMENT** of millions of people, many of whom struggle to maintain reasonable livelihoods.



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Meeting the Sustainable Development Goals

FIGURE 32
KEEPING MOMENTUM TO ACHIEVE THE 2030 AGENDA



Many Sustainable Development Goals (SDGs) are directly relevant to fisheries and aquaculture,

in particular SDG 14 'Life under water'





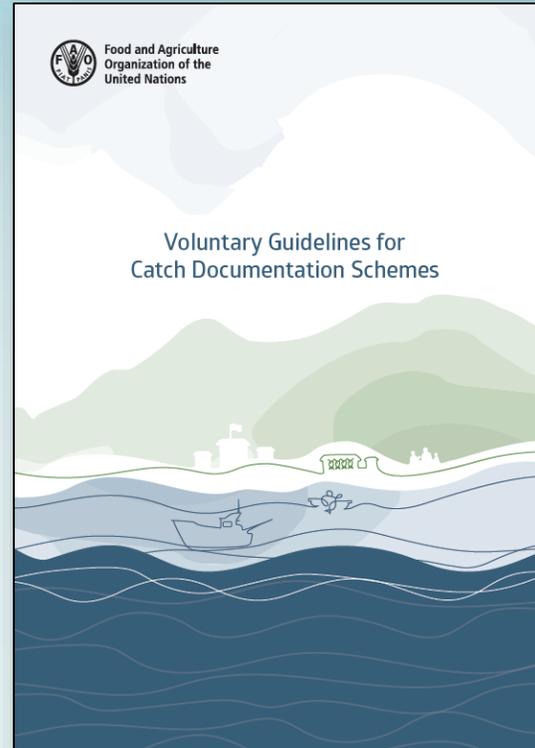
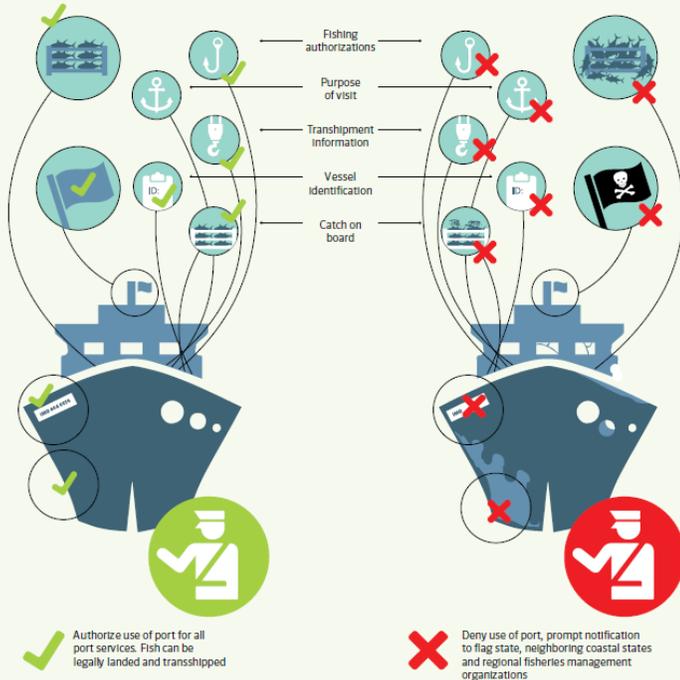
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Combatting illegal, unreported and unregulated fishing

The Port State Measure Agreement

The Port State Measures Agreement is a cost-effective and efficient manner to combat IUU fishing by preventing vessels engaged in IUU fishing from using ports to land their catches.

Two foreign vessels request entry to a designated port in a country that adheres to the Port State Measures Agreement:



Recent FAO-led international developments include:

- **Catch Documentation schemes**
- **Global Record**
- **Port State Measures agreement**

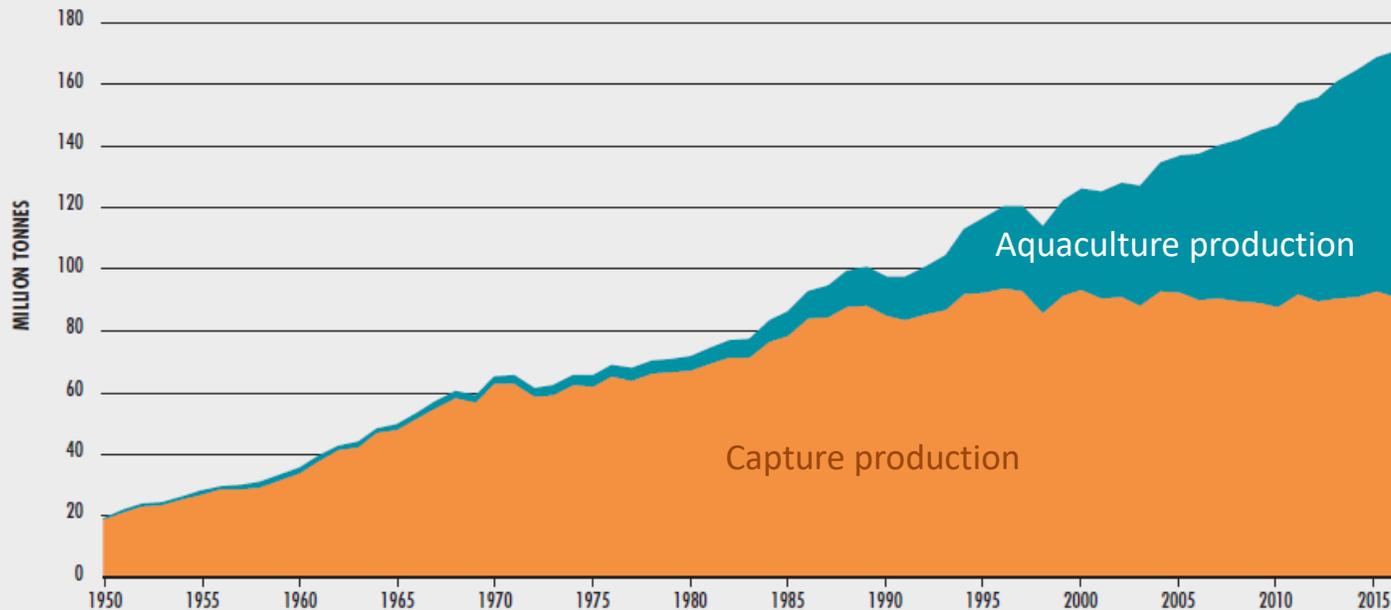




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Total Fish Production

FIGURE 1
WORLD CAPTURE FISHERIES AND AQUACULTURE PRODUCTION



Note: Exclude aquatic mammals, crocodiles, alligators and caimans, seaweeds and other aquatic plants

- In 2016 reached an all-time high of 171 million tonnes
- 88 percent utilized for direct human consumption

Thanks to:

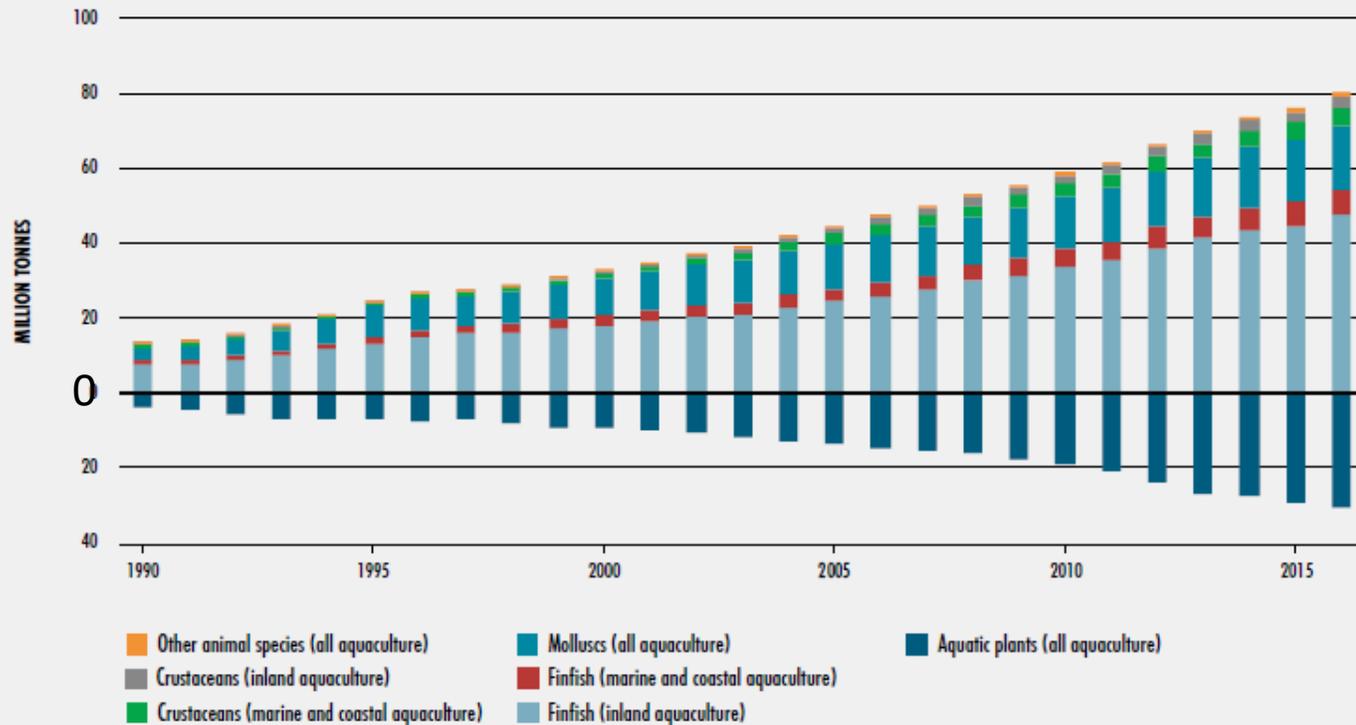
- Stable capture fisheries production,
- Reduced wastage and
- Aquaculture growth



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Global Aquaculture Production

FIGURE 5
WORLD AQUACULTURE PRODUCTION OF FOOD FISH AND AQUATIC PLANTS,
1990–2016



In 2016

80.0 million tonnes of food fish
(53 percent of total food fish)

30.1 million tonnes of aquatic
plants

5.8 percent annual growth rate
during 2001-2016



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The Status of Fishery Resources

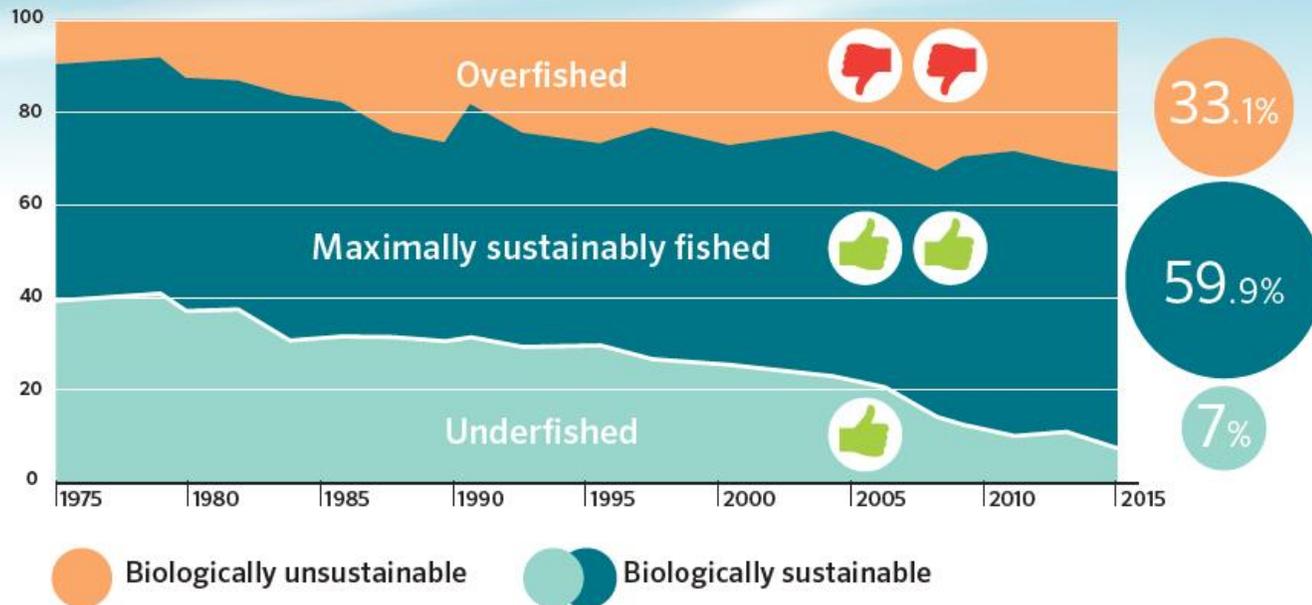
The category "Fully Fished" has been re-named "Maximally Sustainably Fished" to avoid confusion

Continues to show worrying trends:

➤ Overfished stocks increased from 10.0 in 1974 to 33.1 percent in 2015

➤ Stocks fished within biologically sustainable levels decreased from 90.0 in 1974 to 66.9 percent in 2015

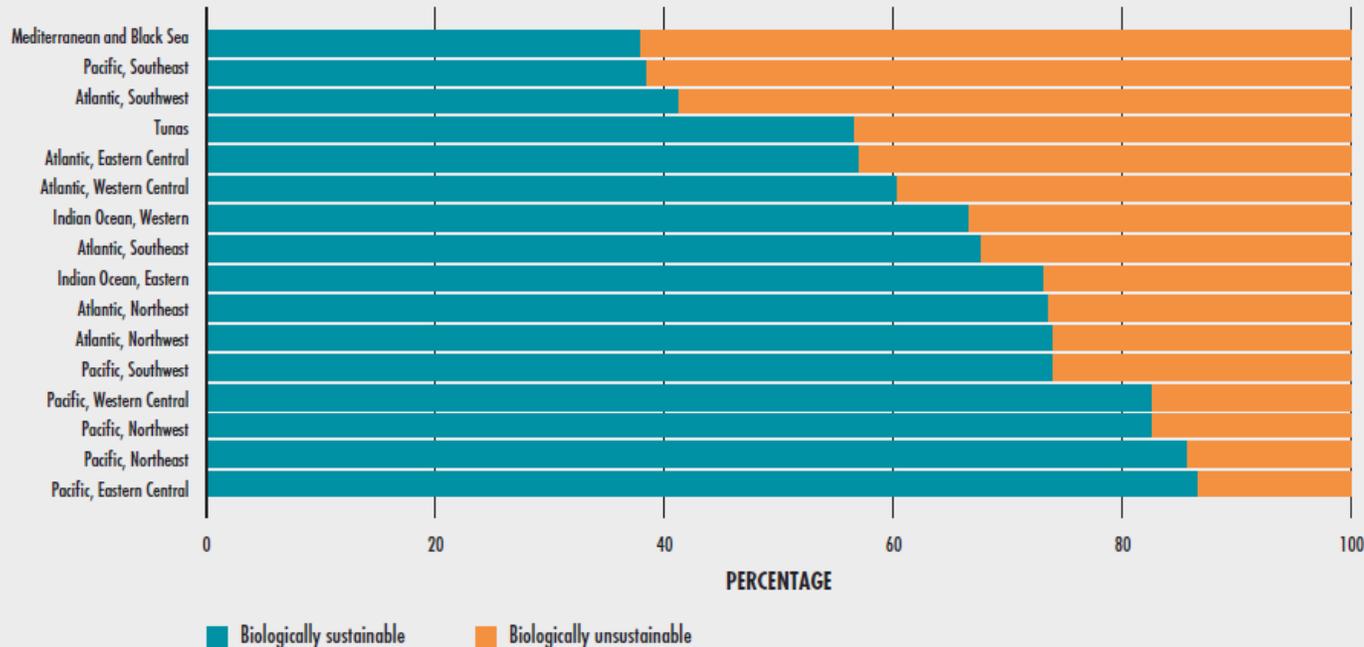
State of the world's marine fish stocks



- The global picture masks signs of recovery in the developed world
- The sustainability divide between developed and developing countries constitutes a major challenge to achieving SDG14.4



FIGURE 15
PERCENTAGES OF STOCKS FISHED AT BIOLOGICALLY SUSTAINABLE AND UNSUSTAINABLE LEVELS
BY FAO STATISTICAL AREA, 2015



NOTE: Tuna stocks are singled out as they are largely migratory and straddling across statistical areas.

Highest percentage of unsustainable stocks:

- the Mediterranean and Black Sea (62.2 percent Area 37)
- the Southeast Pacific (61.5 percent Area 87)
- Southwest Atlantic (58.8 percent, Area 41)

Lowest percentage of unsustainable stocks (13-17 percent overfished):

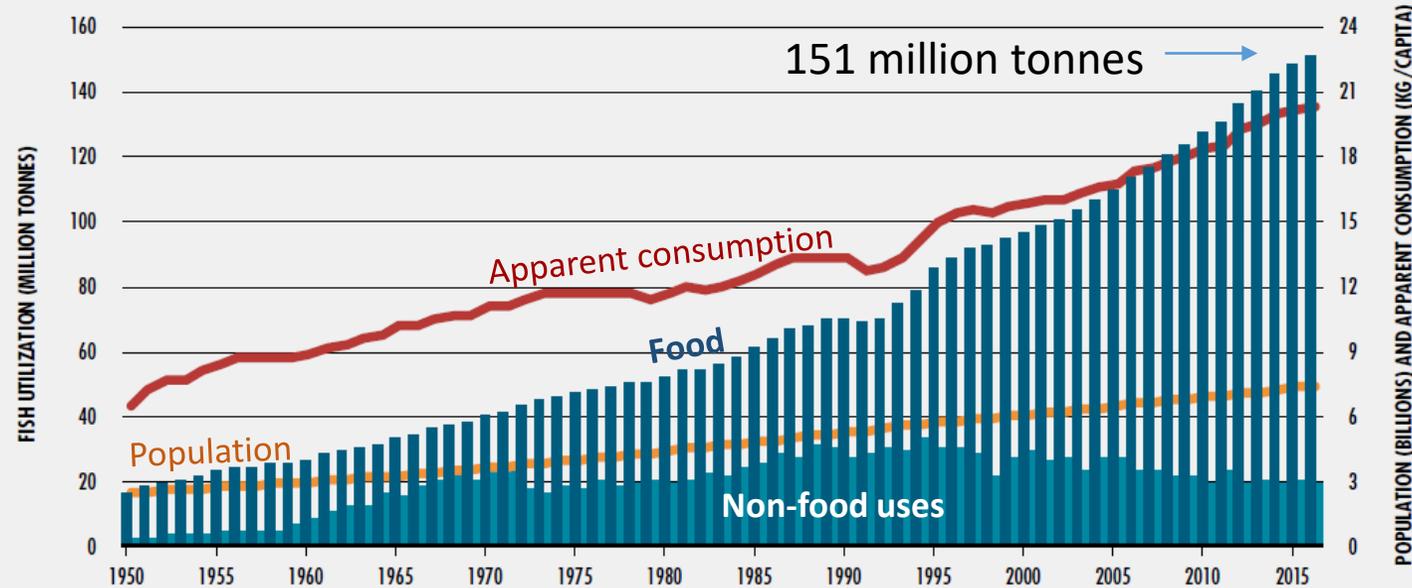
- Eastern Central (Area 77) and Western Central (Area 71) Pacific
- NE (Area 67) and NW (Area 61)
- Southwest Pacific (Area 81)



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[Apparent] Fish Consumption

FIGURE 2
WORLD FISH UTILIZATION AND APPARENT CONSUMPTION



- In 2016, 151 million tonnes were utilized for direct human consumption
- Global fish consumption in 2015 reached an all-time record of 20.2 kg/capita/year (estimated 20.3 in 2016)

Fish consumption*



9Kg

1961



20.3Kg

2016

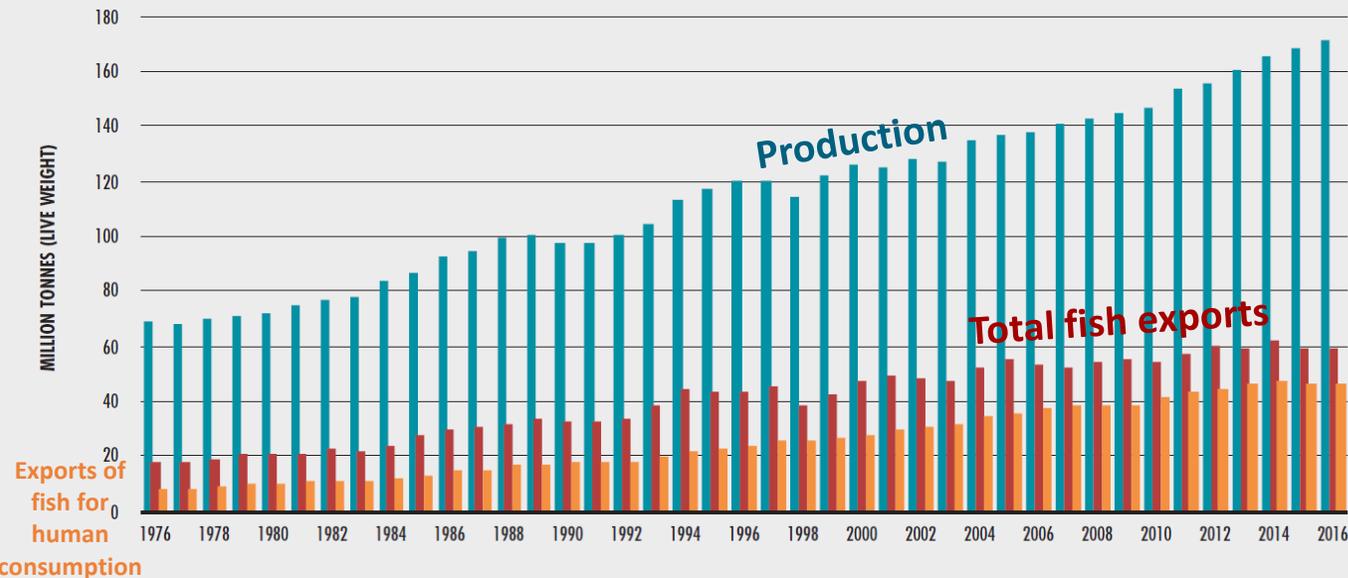
*per capita



In 2016

- 35% of all fish products enter the international trade
- Exports value of US \$143 billion
- Developing countries made up 59 percent of total fish exports volume (54% in value)
- Net trade revenue for developing countries (US \$37 billion) exceeds that of all meats, tobacco, rice, sugar combined
- Fish exports (in volume) in 2016 represent a 245 percent increase over 1976.

FIGURE 19
WORLD FISHERIES AND AQUACULTURE PRODUCTION AND QUANTITIES DESTINED FOR EXPORT





Fish Trade

Fish trade is valued at 143 billion USD.



Which countries are the major marine capture fisheries producers?

1. China
2. Indonesia
3. United States of America
4. Russian Federation
5. Peru
6. India
7. Japan
8. Viet Nam
9. Norway
10. Philippines

Which countries are the major aquaculture producers? **

1. China
2. India
3. Indonesia
4. Viet Nam
5. Bangladesh
6. Egypt
7. Norway
8. Chile
9. Myanmar
10. Thailand

** excluding aquatic plants

Major importers of fish and fishery products: *

1. United States of America
2. Japan
3. China
4. Spain
5. France
6. Germany
7. Italy
8. Sweden
9. Republic of Korea
10. United Kingdom

* Major importers and exporters measured in value

Major exporters of fish and fishery products: *

1. China
2. Norway
3. Viet Nam
4. Thailand
5. United States of America
6. India
7. Chile
8. Canada
9. Denmark
10. Sweden

EXPORT

In 2016

- China is the main fish producer
- Since 2002, China is the largest exporter of fish and fish products, followed in 2016 by Norway and Viet Nam
- The European Union, followed by the United States and Japan, are the major importers of fish and fish products.

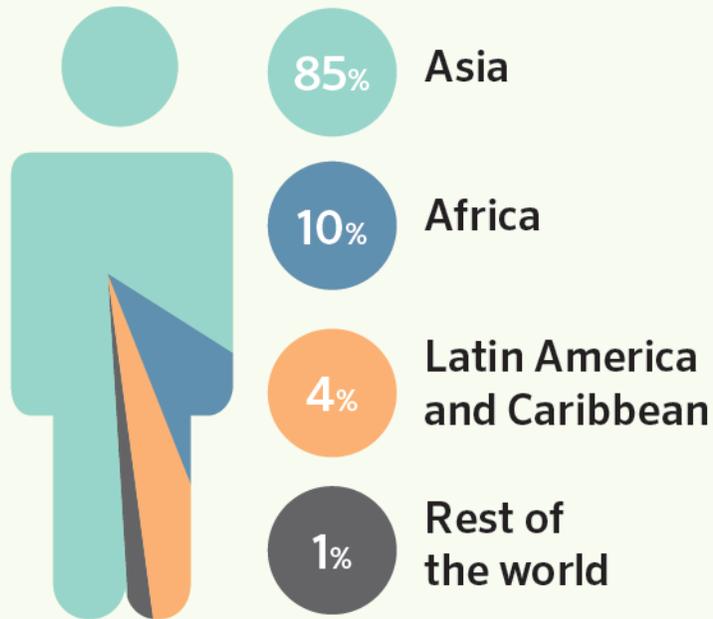


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Employment in fisheries and aquaculture

Employment in fisheries and aquaculture

59.6 million people engaged in primary sector of fisheries



19.3
MILLION
in aquaculture

40.3
MILLION
in fisheries

When including the
secondary sector, over

50%
ARE WOMEN

In 2016

➤ 59.6 million people were engaged in the primary sector of capture fisheries and aquaculture

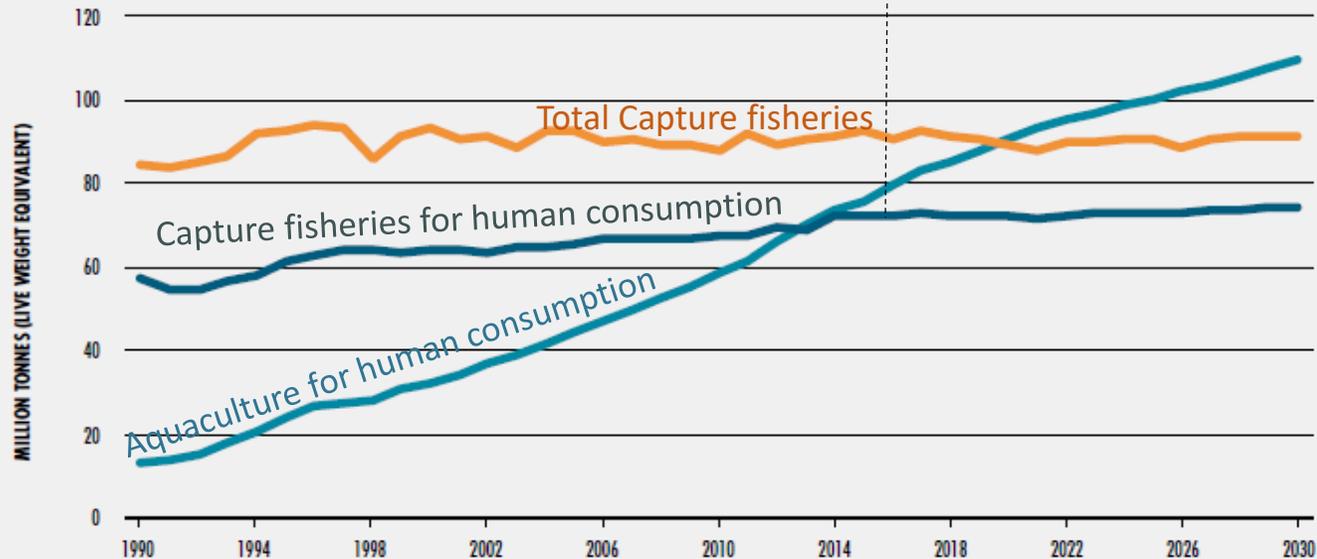


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Outlook to 2030 – Projections for Fisheries, Aquaculture and Markets

Average Fish
consumption
20.2 kg / capita in 2015

FIGURE 50
GLOBAL CAPTURE FISHERIES AND AQUACULTURE PRODUCTION, 1990–2030



- World fish production, consumption and trade are expected to increase.
- Expanding world aquaculture production is anticipated to fill the supply–demand gap.
- This growth rate will slow down over time.
- Prices will all increase in nominal terms while declining in real terms, although remaining high.
- Food fish supply will increase in all regions, while per capita fish consumption is expected to decline in Africa, which raises food security concerns.



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Suggested Action by the Committee

- Underline the importance of FAO's role in reporting on the state of world fisheries and aquaculture, and advise on how COFI can best contribute to this and benefit from it
- Underline the relevance of SOFIA and advise on its role in the framework of the 2030 Agenda for Sustainable Development
- Provide advice on how the publication can be improved in future editions



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SOFIA

Online Survey for The State of World Fisheries and Aquaculture (SOFIA)

Through this survey we would like to get your feedback on the relevance, quality and usefulness of the information and analyses presented in SOFIA, as well as on the main features you would like to see in future editions. We would greatly appreciate it if you could complete the questionnaire. Your feedback and suggestions will help make SOFIA an even better resource, and inform an ongoing evaluation of FAO's contribution to knowledge on food, agriculture and natural resources.

Please go to <https://goo.gl/vauqQ6>



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