



COMMITTEE ON FISHERIES

SUB-COMMITTEE ON AQUACULTURE

Eleventh Session

24–27 May 2022

REPORT FROM THE SECRETARIAT OF THE COFI SUB-COMMITTEE ON FISH TRADE: FOR INFORMATION

INTRODUCTION

1. The Seventeenth Session of the Sub-Committee on Fish Trade (COFI:FT/XVII) of the Committee on Fisheries (COFI) was held in Vigo, Spain, in November 2019,¹ and the Eighteenth Session will take place virtually on 7, 8, 9 and 20 June 2022. The report is provided as Information Document COFI:AQ/XI/2022/INF.8.
2. The following paragraphs summarize the main discussions of interest to the aquaculture sector and related updates since COFI:FT/XVII.

RECENT INTERNATIONAL TRADE DATA

3. The fisheries and aquaculture sectors expanded significantly in recent decades, increasing overall production, trade and consumption. This expansion has been characterized by many transformations, including changes in the production source, being progressively more dependent on aquaculture. Significant changes occurred in the key producers and traders, with consistent growth of the role of developing countries, particularly in Asia.
4. Fisheries and aquaculture products are among the most traded food commodities worldwide. In 2019, about 37 percent of total fisheries and aquaculture production entered international trade in different product forms, and over 200 countries and territories reported fish trading activities. In 2019,

¹ www.fao.org/3/ca8665t/CA8665T.pdf

Documents can be consulted at www.fao.org

exports of fisheries and aquaculture products were valued at USD 161 billion, accounting for about 11 percent of the export value of agricultural products (excluding forest products) and about 1 percent of total merchandise trade value. This compares with USD156 billion for the trade of all meats. From 1976 to 2019, the value of global exports of fisheries and aquaculture products increased at an annual rate of 7 percent in nominal terms. The share of developing countries in this trade increased from 38 percent of global export value in 1976 to 54 percent in 2019. In 2019, exports of fisheries and aquaculture products of developing countries were valued at USD 87 billion. Developed markets still dominate fish imports, but the importance of developing countries as consumers and producers has been steadily increasing. In 2019, fish imports by developing countries represented 32 percent of the global total by value, compared with 12 percent in 1976.

MAIN OUTCOMES OF THE SESSION

5. The Sub-Committee suggested areas for future fisheries and aquaculture trade analysis, particularly addressing the problems associated with the incomplete recording of intra-regional trade.

6. FAO's important role in fisheries and aquaculture statistics was stressed, with a specific emphasis on the necessity of accurate and timely data and information in support of policy setting, monitoring, and management of fisheries and aquaculture. FAO should continue with capacity-building actions related to the improvement of national data collection.

7. The Sub-Committee reiterated the importance of the basic principles of predictability, transparency and non-discrimination associated with the world trade system. It supported the role FAO plays in providing specialized technical expertise, capacity-building, and analytical work on trade-related issues of fisheries and aquaculture products. The Sub-Committee expressed concern about the growing number of measures having possible impacts on the exports of fisheries and aquaculture products, particularly affecting exports from developing countries. The Sub-Committee underlined the need for more harmonized standards in international trade and called upon FAO to continue its harmonization efforts.

8. FAO was encouraged to continue the reported work on quality and safety, small-scale fisheries, product legality and transparency, traceability, biodiversity conservation, and trade agreements. On food fraud, considering its multifaceted aspects, FAO was called to identify critical measures, regulations, tools, and procedures to combat it across value chains and provide technical assistance to countries in this area.

9. The Sub-Committee stressed the critical role played by the fisheries and aquaculture sectors in terms of production and trade, contributing to (i) global food security; (ii) economic growth and development, livelihoods and income; (iii) the inclusiveness of women; and (iv) the participation of developing countries.

10. The importance of communication in aquaculture to address consumer perceptions and misconceptions was highlighted by the Sub-Committee, particularly reiterating the role of FAO, governments, the private sector, and other stakeholders in communicating, building trust, and increasing transparency in aquaculture value chains. It was recommended that the Sub-Committee on Aquaculture addresses this topic to have it discussed in a more appropriate forum, avoiding any duplication or overlapping.

11. The Sub-Committee underscored that the responses to the questionnaire monitoring the implementation of Article 11 of the FAO Code of Conduct for Responsible Fisheries (CCRF) should be seen as a platform to facilitate analysis, future technical assistance, and capacity building actions, addressing the challenges faced by Members. It was requested that FAO redraft the questions to obtain more specific responses from Members and conduct further analysis of the open-ended responses to identify trends and inform the work of COFI and COFI:FT.

12. The importance of the Sub-Committee as the only global forum dedicated to discussions of trade issues in fisheries and aquaculture was also emphasized.

UPDATES ON FAO MAIN ACTIVITIES AND DELIVERABLES AFTER COFI:FT/XVII

13. Based on recommendations of previous COFI:FT sessions, the following main activities have been developed since COFI:FT/XVII.

14. FAO continued publicizing information and enhancing collaboration on themes associated with fish production, fish trade, markets for fisheries and aquaculture products, food safety, border rejection of fisheries and aquaculture products, fish food loss and waste, Sustainable Development Goals (SDGs) and transparency.

15. FAO is developing the “FAO Practical Guidance on Developing Sustainable Value Chains for Aquatic Products” under the European Commission-funded FISH4ACP project,² focusing on a standardized approach for value chain analysis and development in fisheries and aquaculture. The methodology is being field-tested in ten African, Caribbean, and Pacific countries and will be utilized in other ongoing fish value chain projects.

16. In collaboration with the International Labour Organization (ILO), FAO also published the “Guide to Dried Shrimp Production”,³ for producers, buyers, and those involved in extension services. It aims to describe sound processing, handling, and hygiene practices to help producers maximize the value and income from dried shrimp, meet required national standards, and access new and high-value markets.

17. In June 2021, the Voluntary Code of Conduct for Food Loss and Waste Reduction was approved at the Forty-second Session of the FAO Conference. In fisheries and aquaculture, the food loss and waste website⁴ continues to be updated regularly with new information and resources to report associated causes and solutions. In December 2020, FAO, in conjunction with the African Women Fish Processors and Traders Network (AWFishNET), held an initial virtual event to raise awareness of the interlinked issues of gender and food loss and waste in African fish value chains.

18. FAO continued its work on traceability by developing a draft guidance document on “Advancing end-to-end traceability: Critical Tracking Events (CTEs) and Key Data Elements (KDEs) along capture fisheries and aquaculture value chains”. The document is undergoing online public consultations and informal regional ones to collect inputs from interested parties and Members. In addition, FAO has provided technical advice to the Global Sustainable Seafood Initiative (GSSI) to revise the second version of the Global Benchmark Tool. FAO has also been assisting the development of GSSI’s novel approach (Seafood MAP) in supporting non-certified fisheries and farms with a common language framework towards responsible and sustainable practices.

19. In the area of social responsibility, FAO promoted the Vigo Dialogue 2020, addressing social problems faced by fisheries and aquaculture workers and the industry, small and medium enterprises associated with the COVID-19 pandemic.⁵ In June 2021, FAO started a series of informal regional

² Based on the FAO Sustainable Food Value Chain (SFVC) and the EC Value Chain Analysis for Development (VCA4D).

³ www.fao.org/documents/card/en/c/ca8928en/

⁴ www.fao.org/flw-in-fish-value-chains/en/

⁵ www.fao.org/documents/card/en/c/cb5009en

consultations with Members to present and discuss the current development of a guidance on social responsibility, as recommended by the Thirty-third Session of COFI. FAO work on this guidance is being conducted in close cooperation with relevant United Nations (UN) agencies and stakeholders.

20. In the area of information sharing, FAO GLOBEFISH has launched new information products. To facilitate the understanding, dissemination, and widespread use of the classification of fisheries and aquaculture products based on the Harmonized System (HS), FAO, with the technical support of the World Customs Organization (WCO), developed a Handbook on the HS codes for fish and fish products.⁶ This publication is entirely based on the HS Code used to classify internationally traded products to gather statistics and assess duties and taxes. The publication presents all commodity codes for fisheries and aquaculture products, including related products classified in HS Code chapters 3, 5, 12, 13, 15, 16 and 23, providing a comprehensive description of the coverage of every single code. Furthermore, FAO GLOBEFISH has organized a series of online events to provide more up-to-date information on fish trade and markets and facilitate countries adopting best practices, including adaptation to the new normal due to the COVID-19 pandemic.

21. FAO is finalizing a new questionnaire on article 11 of the CCRF addressing post-harvest practices and trade to be distributed to Members and reported to COFI:FT/XVIII.

COLLABORATION WITH OTHER UN AGENCIES

22. In the development of many activities associated with trade aspects of fisheries and aquaculture products, FAO has been in close collaborative efforts with other UN agencies and International Organizations, in particular the World Trade Organization, the ILO, the International Maritime Organization, the World Health Organization, the Intergovernmental Oceanographic Commission of the United Nations Educational, Scientific and Cultural Organization, the International Atomic Energy Agency and the United Nations Conference on Trade and Development. In addition, a constructive collaboration also exists with the Organisation for Economic Co-operation and Development and the WCO.

⁶ <https://bit.ly/HS-Handbook>