



COMMITTEE ON FISHERIES

SUB-COMMITTEE ON FISH TRADE

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ENABLING SUSTAINABLE TRADE AND MARKET ACCESS FOR SMALL-SCALE FISHERIES (SSF)

Executive Summary

Small Scale Fisheries (SSF) actors participate in a variety of markets at the global, regional and national levels. However, they may encounter challenges securing market access and generating sufficient benefits to support sustainable livelihoods. This document reports on related work to enable sustainable trade and market access for SSF, considering emerging issues and developments since the 18th Session of the COFI Sub-Committee on Fish Trade (COFI:FT), and is organized around three thematic areas: data and information, capacity development, and creating an enabling environment.

Suggested action by the Sub-Committee

- Provide guidance on priority activities for FAO, including preparation of specific knowledge products, data, information, and capacity development to support the implementation of Chapter 7 (value chains, post-harvest and trade) of the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (SSF Guidelines)¹ recommendations involving value chains, post-harvest operations and trade and the achievement of the market access component of the Sustainable Development Goal (SDG) 14.b – “Provide access for small-scale artisanal fishers to marine resources and markets”.
- Share experiences towards enabling sustainable trade and market access for SSF, highlighting opportunities and challenges in global, national and regional contexts.

¹ <https://www.fao.org/documents/card/en/c/I4356EN>

- Recognize the main messages and recommendations of the International Year of Artisanal Fisheries and Aquaculture (IYAFA 2022) related to promoting sustainable trade and market access for SSF, including support to the forthcoming commemoration of the tenth anniversary of the SSF Guidelines.

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BACKGROUND

1. Since 2019, Members have recalled, within the context of the COFI:FT, the SSF Guidelines as an essential tool and emphasized the significance of FAO's work in relation to its Chapter 7 and toward achieving SDG 14.b.
2. Furthermore, in different COFI:FT sessions, strong support was expressed for FAO to continue improving Members' understanding of value chains, post-harvest operations and trade in the context of SSF and to support equitable market access for SSF, considering gender approaches. In addition, FAO was also urged to prioritize efforts that assist SSF in obtaining market access and enhancing food security by developing specific knowledge products, data, information, and capacity-building activities.

INTRODUCTION

3. According to the latest estimates, SSF accounted for at least 40 percent of the global landings from capture fisheries in terms of volume and 44 percent of the total value of the landed catch in 2016.² The estimated average annual global landed value of SSF capture during 2013-2017 was nearly USD 77.2 billion in nominal terms, with marine SSF contributing over USD 58.1 billion and inland SSF contributing over USD 19.0 billion.
4. SSF employ an estimated 60.2 million people across the value chain, about 90 percent of the total number of people employed in capture fisheries worldwide. In 2016, total employment in SSF value chains accounted for 1.9 percent of the globally employed population, 1 in every 50 jobs worldwide, and 6.7 percent of agricultural employment (crop, livestock, forestry and fisheries). Women accounted for 35 percent of the total workforce along the SSF value chain (20.9 million) and nearly half (49.8 percent) of the people employed part or full-time in the post-harvest segment of the SSF value chain.
5. Collectively, when considering those employed in SSF along the value chain and those engaged in subsistence activities and their dependents, at least 491.7 million people depend in part on SSF for their livelihoods, representing almost 6.6 percent of the world population and 13.2 percent in the 46 Least Developed Countries (LDCs).
6. In the past fifty years, SSF have contributed to expanding international trade in fisheries and aquaculture products.³ The dynamics of the global market of aquatic products have become increasingly relevant for SSF, as developing countries' share of international aquatic food trade flows has steadily increased since 1976.⁴
7. Increasing participation of SSF in global aquatic markets should be viewed with optimism and caution. It presents an opportunity to increase incomes and reduce poverty but could also pose risks in

² <https://www.fao.org/3/cc4576en/cc4576en.pdf>

³ <https://doi.org/10.4060/ca9229en>

⁴ <https://doi.org/10.4060/cb7874t>

increased resource exploitation, inequality, and food insecurity. This could apply to international, regional, and domestic markets.

DATA AND INFORMATION

Illuminating Hidden Harvests (IHH)

8. FAO, Duke University and WorldFish launched the report “Illuminating Hidden Harvests: the Contributions of Small-Scale Fisheries to sustainable development” in March 2023.⁵ Nearly 800 individual researchers, government officials and consultants contributed to the production of this report, which covers 58 countries and territories. This section presents some pertinent additional findings of the study.

9. IHH is the first attempt to estimate the contribution of SSF to formal export volumes of aquatic foods at a national level. It provides the most comprehensive assessment of the interaction between global aquatic food and markets, which is challenged by the lack of market differentiation of products from aquaculture and capture fisheries in general, as well as large- and small-scale production of both these production systems.

The role of SSF in the international trade of aquatic food products

10. Drawing on the data from a number of case studies, the IHH study found that international trade, including informal trade, is an essential aspect of SSF in all regions of the world. According to estimates for 22 countries studied, which account for 48 percent of the world’s marine capture fisheries production, nearly 26 percent on average of the marine SSF catch by volume was exported between 2013 and 2017. According to estimates for nine countries representing 25 percent of the world’s inland capture fisheries production, slightly more than 16 percent on average of the inland SSF catch was exported between 2013 and 2017.

11. At the regional level, the six analysed African countries exported an average of 28 percent of their marine SSF catch. The eight American and six Asian countries exported an average of 22 and 18 percent, respectively, and the two European countries exported an average of 74 percent.

12. The IHH analysis of the 26 country case studies with available export estimates reveals that international exports from SSF catches tend to increase as countries advance in the economic transformation, as catches from high-income countries were more likely to be exported.

13. According to the available data, among the SSF species catches most likely to be exported are sea urchin, sea cucumber and other echinoderms (about 71 percent of their catches being exported), cephalopods (octopus, squids and cuttlefish at 43 percent) and crustaceans with about 40 percent (IHH study, page 122 Table 5.7).

14. IHH insights serve as a foundation for a more comprehensive understanding of the role of SSF and their interactions with international markets of aquatic food products. A deeper understanding of the dynamics underpinning the role of SSF in trade would enable more effective policy interventions and capacity development initiatives, including in the context of the recent Agreement on Fisheries Subsidies at the World Trade Organization (WTO) and its implementation.

15. In addition, considering the global diversity and complexity of the subsector, delineating a fishery or a subset of fishery participants based on operational characteristics can be helpful and even essential for effectively targeting and implementing policies. In this regard, IHH presented a matrix-based method for ranking fisheries according to multiple operational characteristics, serving as a tool to compensate for the absence of a standard SSF definition.

⁵ <https://www.fao.org/3/cc4576en/cc4576en.pdf>

GLOBEFISH

16. In response to COFI:FT's appreciation of SSF-specific trade and market information, the GLOBEFISH website will be expanded to include a new section for SSF.⁶ This new webpage will provide SSF-specific trade and market knowledge and consolidate information about FAO's efforts to promote and improve trade and market access by enhancing value chains, post-harvest operations and trade, and access to resources, including relevant knowledge products, data, and tools. The new section of the website is anticipated to be launched in 2023.

Information and communication technology

17. Information and communication technologies (ICTs), such as smartphones, applications, and cloud analytics, have tremendous transformative potential for SSF. For effective ICT use, it is necessary to mitigate the risks of increasing inequality and avoid the digital divide, particularly involving gender and the poor. In this regard, FAO and WorldFish have collaborated to investigate information and communication technologies for SSF and published a handbook for fisheries stakeholders that includes market access scenarios.⁷

CAPACITY DEVELOPMENT

Empowering women in fisheries for sustainable food systems

18. The project is funded by Norway through FAO's Flexible Voluntary Contribution (FVC) initiative.⁸ It supports women in Ghana, Indonesia, Madagascar, Malawi, Namibia, the Philippines, the United Republic of Tanzania, Sierra Leone, and Uganda employed in the post-harvest sector of SSF.

19. Working with stakeholders in the field, the project produced a series of peer-to-peer videos that support market access for SSF by promoting improved handling and processing through infrastructure design, group organization and management, value addition and product diversification. The videos and related fact sheets are deployed in participatory training activities to encourage demand-driven interventions that enhance market access.^{9, 10, 11, 12, 13}

20. In Madagascar, the project supports the establishment of village savings and loan (S&L) associations. Typically consisting of 15-25 members, these associations function so that members contribute financially to the association and are subsequently eligible for loans, which, when repaid with interest, enable the association's fund to grow. In addition to assisting with establishing these associations, the project is also developing training manuals that could be used to inform the establishment of S&L associations in other regions.

21. In Ghana, the project developed a gender-responsive food loss assessment methodology that assists in identifying and assessing gender-based constraints that may contribute to lower productivity and inefficiency, ultimately resulting in food loss and waste and lower profits for SSF processors. The methodology is being piloted at project sites in Ghana in tandem with training and capacity building on better fish processing and business management practices.

22. In Indonesia, the project aims to enhance women's organizations' business management and marketing skills. Simultaneously, the project has provided food safety and quality training to facilitate the attainment of Home Industry Products Certification (PIRT), a crucial permit requirement for selling products to consumers.

⁶ <https://www.fao.org/in-action/globefish/globefish-home/en/>

⁷ <https://www.fao.org/documents/card/es/c/cb2030en/>

⁸ <https://www.fao.org/flexible-multipartner-mechanism/background/en/>

⁹ <https://www.fao.org/voluntary-guidelines-small-scale-fisheries/resources/detail/en/c/1607567/>

¹⁰ <https://www.fao.org/voluntary-guidelines-small-scale-fisheries/resources/detail/en/c/1607574/>

¹¹ <https://www.fao.org/voluntary-guidelines-small-scale-fisheries/resources/detail/en/c/1607575/>

¹² <https://www.fao.org/voluntary-guidelines-small-scale-fisheries/resources/detail/en/c/1607576/>

¹³ <https://www.fao.org/voluntary-guidelines-small-scale-fisheries/resources/detail/en/c/1607577/>

Promoting coastal fisheries' contributions to food security and socio-economic development

23. The project is financed by the Global Environment Facility (GEF) and aims to preserve marine resources and support artisanal fisheries in Cabo Verde, Côte d'Ivoire, Ecuador, Indonesia, Peru and Senegal.¹⁴ It employs a two-pronged strategy to create a sustainable and profitable environment for SSF by working with authorities to improve legal frameworks and with fisher and fish worker organizations to strengthen their capacities and market access.

24. In Cabo Verde, the project conducted value chain and gender analyses to support more efficient, gender-equitable value chains, which informed a gender strategy to increase the economic power and autonomy in the decision-making of women fishers and fish workers. The process is being implemented with the Ministry of the Sea of Cabo Verde, the Institute for Gender Equality and Equity, and the Escola do Mar (School of the Sea).

25. In Ecuador, the project assisted the Manta Pole & Line Fishing Association (Asociación Cañeros de Manta) in obtaining Fair Trade certification for their ancestral fishery.¹⁵ Fair Trade certification is a market-driven model for developing socially, economically, and environmentally sustainable value chains that aim to promote equity by distributing the benefits of trade and export among primary producers and processors.

26. In Indonesia, the project promotes the Sasi label for products sourced following a traditional resource management practice.¹⁶ Sasi includes spatial and temporal restrictions on resource harvesting and defines seasonal rules for the region's entry, harvesting, and permitted activities. Additionally, it governs social interactions. The rules are monitored and enforced by the kewang, which serves as the local police force. Their legitimacy and that of the Sasi institution are grounded in "adat" or customary law. The objective is to generate market rewards for community-based indigenous-led fisheries management.

Strengthening SSF value chains using a stakeholder-driven approach

27. The Fish4ACP project is an initiative of the Organisation of African, Caribbean and Pacific States (OACPS) that contributes to food and nutrition security, economic prosperity, and job creation by ensuring fisheries and aquaculture's economic, social, and environmental sustainability.¹⁷ It is coordinated by FAO and funded by the European Union (EU) and the German Federal Ministry for Economic Cooperation and Development (BMZ).

28. One of the project's activities aims to develop and diversify domestic markets for fresh oysters in the Gambia and Senegal. In the Gambia, the project will conduct a scoping study on the tourist market, including investigating the requirements for developing the tourism industry. Senegal's National Oyster Day is a flagship activity aiming to promote the consumption of fresh oysters and other processed oyster products.

29. In the Dominican Republic, the project is assisting in developing the "national mahi-mahi route", aiming to increase the availability of mahi-mahi, create national substitutes for imported similar products, and meet local demand without increasing catches. The project seeks to accomplish this by enhancing the transport, storage, marketing system and cold chain, processing practices and links between value chain actors.

30. In Sao Tome and Principe, the project is developing new market opportunities for fishers and fish workers from the island of Principe, where fish production exceeds demand. The project will support the trade of excess catch with neighbouring Sao Tome by enhancing sectorial associations' shipping and purchasing capabilities, facilitating the formation of commercial agreements between associations, and improving transport conditions between the two islands.

¹⁴ <https://www.fao.org/in-action/coastal-fisheries-initiative/en/>

¹⁵ <https://www.fao.org/in-action/coastal-fisheries-initiative/news/detail/en/c/1603598/>

¹⁶ <https://www.fao.org/in-action/coastal-fisheries-initiative/news/detail/en/c/1607258/>

¹⁷ <https://www.fao.org/in-action/fish-4-acp/en/>

31. The project is conducting a scoping study in the United Republic of Tanzania to identify potential markets for Lake Tanganyika fisheries products, such as dagaa and perch. The study will collect information on major urban centres, such as Dar es Salaam, Morogoro, Kigoma, Dodoma, Arusha and Mbeya, and is expected to pave the way for increased access to major markets with premium prices, promising a better future for small-scale fisherfolk of Lake Tanganyika.

Certification

32. The global fisheries and aquaculture industry is increasingly committed to sourcing sustainable products. Certifications, ratings, and fisheries and aquaculture improvement projects are important tools the industry employs to assess, measure, and verify the sustainability of traded fisheries and aquaculture products.

33. FAO organized a webinar titled “Sustainability Certification: harnessing the Potential for Small-Scale Fisheries and Aquaculture” in May 2022 to provide an overview of sustainability certification schemes and discuss constraints and trends in fisheries and aquaculture, mainly focusing on small-scale operations.¹⁸ More than 200 participants from 64 countries in Africa, Asia, Europe, Latin and North America attended the event. FAO will commission a report and undertake an analysis of certification schemes for SSF based on findings from the webinar following the recommendation of information dissemination of the 18th Session of COFI:FT.

34. Geographical Indications (GIs) are voluntary collective marketing instruments that enable smallholders to define their standards tailored to local conditions and specific product characteristics. Although approximately 8 600 GIs are registered globally, only 6 percent of GI-labelled food products are aquatic. FAO is developing a technical paper highlighting GIs as a facilitator of sustainable market access for aquatic food products. It aims to disseminate information regarding the success factors of GIs, the challenges they face, and their potential to contribute to economic, social and environmental sustainability. An international webinar titled “Realizing the potential of geographical indications to advance sustainable seafood value chains” was held in November 2021 to inform the technical paper.¹⁹ The event attracted over 70 participants from 32 countries and enabled the collection of views on the draft findings, case studies and recommendations.

CREATING AN ENABLING ENVIRONMENT

IYAFA 2022

35. The International Year of Artisanal Fisheries and Aquaculture (IYAFA 2022) highlighted the importance of small-scale artisanal fisheries and aquaculture to food systems, livelihoods, culture, and the environment. IYAFA 2022 was a genuinely international effort, with 266 events in 68 countries.

36. Small-scale artisanal fishers, fish farmers and fishworkers informed the IYAFA 2022 recommendations by reiterating that “access to markets, appropriate infrastructure and inclusive value chains enable fishers, fish farmers and fishworkers to provide affordable, high-quality fish products, foster economic development and generate employment.”²⁰ They called for continued efforts to raise the profile of sustainable practices that reduce food waste and loss and increase opportunities for income generation; increase access to financial resources and markets; increase the representation of small-scale artisanal fisheries and aquaculture in decision-making processes through self-organization and collective action at all phases of the value chain.

37. IYAFA 2022 recommended the establishment of an SSF Summit as a participatory platform for SSF actors and others to convene and collectively support the progress of the SSF Guidelines’ implementation. The Committee on Fisheries (COFI) welcomed the SSF Summit organized in September 2022 with support from FAO and recommended that it be conducted every two years before

¹⁸ <https://seminars.iamz.ciheam.org/certificationiyafa2022/programme/>

¹⁹ <https://www.fao.org/in-action/globefish/news-events/details-events/en/c/1628199/>

²⁰ <https://www.fao.org/artisanal-fisheries-aquaculture-2022/home/en/>

the COFI sessions.²¹ At the next SSF Summit, which will take place in July 2024, partners will celebrate the 10th anniversary of the SSF Guidelines, reflect on progress and challenges, and build on the momentum to empower small-scale artisanal fishers, fish farmers and fish workers to achieve an inclusive and equitable Blue Transformation.²²

NPOA-SSF

38. A National Plan of Action for Small-Scale Fisheries (NPOA-SSF) is a participatory, systematic approach to implementing the SSF Guidelines at the national level. The multi-stakeholder process is designed to identify challenges and opportunities for SSF and agree on strategic interventions to address and realize them, including an emphasis on value chains, post-harvest operations and trade. FAO supported the creation of NPOA-SSFs in the United Republic of Tanzania and Namibia and is currently supporting similar processes in Madagascar, Malawi, Uganda and the Philippines. FAO will finalize and publish a free, user-friendly toolkit designed to guide the development of NPOA-SSF.

FAO SSF Lex

39. FAO introduced SSF Lex in September 2023 as a new legal and policy database on SSF that contributes to implementing the SSF Guidelines.²³ It includes country profiles containing existing national regulatory frameworks, such as those on value chains, post-harvest operations, and trade.

²¹ <https://www.fao.org/documents/card/en/c/cc3652en>

²² <https://www.fao.org/3/cc0459en/cc0459en.pdf>

²³ <https://ssfex.fao.org/>