



THE STATE OF WORLD FISHERIES AND AQUACULTURE

2002



Includes
World Fisheries and Aquaculture Atlas
CD-ROM

Editing, design, graphics and desktop publishing:

Editorial Group
FAO Information Division

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ISBN 92-5-104842-8

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FAO Fisheries Department

FOREWORD

During the past two years, the international fisheries community has achieved many important developments: the International Plan of Action on Illegal, Unregulated and Unreported fishing was adopted by FAO members during the first months of 2001; in October of the same year, the Reykjavik Conference on Responsible Fisheries in the Marine Ecosystem called on the world community to promote an effective ecosystems framework for fisheries management; in November 2001, the World Trade Organization's (WTO's) Ministerial Conference in Doha paid special attention to fisheries subsidies and decided that participants in the next round of trade negotiations should aim to clarify and improve WTO disciplines on such subsidies, taking into account the importance of this sector to developing countries; at about the same time, the UN Fish Stocks Agreement came into force; and, in September 2002, the World Summit for Sustainable Development (WSSD) adopted a Plan of Implementation that is clearly focused on improving the sustainability of world fisheries. Aquaculture has received increasing attention during the past two years, as illustrated by the fact that the world's first inter-governmental body to specialize in this field, the Sub-Committee on Aquaculture of the FAO Committee on Fisheries, met in Beijing in the spring of 2002.

In many countries, these international developments have been accompanied by actions aimed at broadening and strengthening fisheries management for the purpose of achieving sustainable fisheries and aquaculture. However, results are slow to arrive, particularly in terms of rebuilding stocks or increasing fishers' incomes. This should be no surprise. Scientists have warned repeatedly that most heavily exploited stocks will take time to recover – if they can do so at all. Patience and perseverance are therefore essential, and fisheries management should foster such attitudes among all those concerned.

One of the important contributions of FAO in this regard is the biennial publication of *The State of World Fisheries and Aquaculture (SOFIA)*, the purpose of which is to provide some of the knowledge required for understanding the fisheries sector.

As in the past, in Part 1 of *SOFIA 2002* the situation in China is reported separately whenever doing otherwise might hide significant differences between developments in China and developments in the rest of the world. Part 2 highlights important issues, some of which are not new, such as the difficulty and importance of obtaining reliable fishery statistics and the plight of small-scale and artisanal fishers, while others have emerged more recently, including catch certification, antibiotics and aquaculture and an ecosystems framework for fisheries management. Part 3 contains reports on three studies that have been published recently by FAO. Part 4 reports on the findings of studies on future fish consumption and speculates about the future implications of the rising costs of capture fisheries.

It is the hope of FAO and its Fisheries Department that this new edition of *SOFIA* will prove to be a useful tool for facilitating a balanced and comprehensive understanding of the fisheries sector, particularly its international aspects.

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ACKNOWLEDGEMENTS

The State of World Fisheries and Aquaculture 2002 was prepared by FAO Fisheries Department staff, led by a team comprising U. Wijkström, A. Gumy and R. Grainger. General direction was provided by the Department's management staff, including: L. Ababouch; J. Csirke; S. Garcia; J. Jia; I. Nomura; B. Satia; J. Turner; and G. Valdimarsson.

The preparation of Part 1, World review of fisheries and aquaculture, was the overall editorial responsibility of R. Grainger assisted by D. Evans (consultant), who coordinated the contributions made by L. Garibaldi (production, capture fisheries); J. Csirke (marine resources); A. Crispoldi (fishers and fishing fleets); R. Metzner (fisheries management); D. Douman (regional fisheries governance); R. Subasinghe (aquaculture); D.M. Bartley (inland fisheries); S. Vannuccini and G. Laurenti (consumption); S. Vannuccini (utilization and trade); and H. Josupeit (commodity trade).

Contributors to Part 2, Selected issues facing fishers and aquaculturists, included: K. Cochrane (implementing the ecosystem approach to capture fisheries management); D. Evans and R. Grainger (reliable statistics as an essential basis for fisheries management); A. Smith (catch certification and documentation); G. MacFadyean (consultant) (poverty alleviation in small-sale fishing communities); and H. Lupin, R. Subasinghe and D. Alderman (of the Centre for Environment, Fisheries and Aquaculture Science [CEFAS] UK) (antibiotic residues in aquaculture products).

Contributors to Part 3, Highlights of special FAO studies, included: J. Csirke (fisheries and long-term climate variability); the Fisheries Development Planning Service (the search for an operational definition of subsidies provided to the fisheries sector); U. Tietze (techno-economic performance of marine capture fisheries); and N. Hishamunda (aquaculture development in China: the role of public sector policies).

Part 4, Outlook, was written by C. de Young, R. Metzner and U. Wijkström.

Part 5, Fisheries activities of country groupings, was written by A. Gumy.

Several other staff members as well as non-FAO authors have contributed texts on specific issues, and they are cited in the relevant boxes throughout the publication. Information of relevance for all five parts has been provided by FAO staff in the Regional and Subregional Offices. S. Montanaro assisted with preparation of the figures and the tables.

The Editorial Group of the FAO Information Division was responsible for the editing, design and production of The State of World Fisheries and Aquaculture 2002.

GLOSSARY

ACC

Administrative Committee on Coordination (UN)

ACP

African, Caribbean and Pacific Group of States (EC)

ADI

acceptable daily intake

AFFP

Arab Federation of Fish Producers

ASEAN

Association of Southeast Asian Nations

CAC

Codex Alimentarius Commission

CARICOM

Caribbean Community and Common Market

CCAMLR

Commission for the Conservation of Antarctic Living Resources

CCP

critical control point

CCSBT

Commission for the Conservation of Southern Bluefin Tuna

c&f

cost and freight

c.i.f.

cost, insurance, freight

CFRAMP

CARICOM Fisheries Resource Assessment and Management Program

CFP

Common Fisheries Policy (EC)

CIDA

Canadian International Development Agency

CIS

Commonwealth of Independent States

COFI

Committee on Fisheries (FAO)

CRFM

Caribbean Regional Fisheries Mechanism (CARICOM)

CWP

Coordinating Working Party on Fishery Statistics (inter-agency)

DANIDA

Danish International Development Agency

DWFN

Distant Water Fishing Nations

EAF

ecosystem approach to fisheries

EEA

European Economic Area

EC

European Community

ECOWAS

Economic Community of West African States

EEC

European Economic Community (superseded by EC)

EEZ

exclusive economic zone

EU

European Union

FFA

South Pacific Forum Fisheries Agency (ù

FIFG

Financial Instrument for Fisheries Guidance (EC)

FISHSTAT

Computer System for Global Fishery Statistical Time Series

f.o.b.

free on board

GLOBEFISH

Computerized System of Fish Marketing Information

GRT

gross registered ton

HACCP

Hazard Analysis and Critical Control Point (system)

HIPC

heavily-indebted poor countries

IACSD

Inter-agency Committee on Sustainable Development

IATTC

Inter-American Tropical Tuna Commission

IBSFC

International Baltic Sea Fishery Commission

ICCAT

International Commission for the Conservation of Atlantic Tunas

ICES

International Council for the Exploration of the Sea

ICFA

International Coalition of Fisheries Associations

ICLARM

International Centre for Living Aquatic Resources Management

IMF

International Monetary Fund

IMO

International Maritime Organization

IOC

Intergovernmental Oceanographic Commission

IOTC

Indian Ocean Tuna Commission

IPOA-IUU

International Plan of Action to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing

IUU

illegal, unreported and unregulated (fishing)

JECFA

Joint FAO/WHO Expert Committee on Food Additives

LAES

Latin American Economic System

LIFDC

low-income food-deficit country

MCS

monitoring, control and surveillance

MRL

maximum residue limit

MRLVD

maximum limit for residues of veterinary drugs (CAC)

NACA

Network of Aquaculture Centres in Asia-Pacific

NAFTA

North American Free Trade Agreement

NGO

non-governmental organization

NRC

National Research Council (United States)

OECD

Organisation for Economic Co-operation and Development

OIE

International Office of Epizootics

OLDEPESCA

Latin American Organization for Fisheries Development

PRSPs

Poverty Reduction Strategy Papers

RFB

regional fishery body

RFMO

regional fisheries management organization

SAARC

South Asian Association for Regional Cooperation

SADC

Southern African Development Community

SEAFDEC

Southeast Asian Fisheries Development Centre

SEAFO

Southeast Atlantic Fisheries Organization

SFLP

Sustainable Fisheries Livelihoods Programme

SPF

South Pacific Forum

SPS

Sanitary and Phytosanitary Agreement (WTO)

TAC

total allowable catch

UNCED

United Nations Conference on Environment and Development

UNCLOS

United Nations Conference on the Law of the Sea

UNEP

United Nations Environment Programme

USFDA

United States Food and Drug Administration

VMS

Vessel Monitoring System

WECAFC

Western Central Atlantic Fisheries Commission

WHO

World Health Organization

WSSD

World Summit for Sustainable Development

WTO

World Trade Organization

Note: The data on food fish supply (total and per capita) presented for the world in the Overview section of Part 1 (Tables 1 and 2) differ from those presented in the Fish utilization section of Part 1 (Table 8) owing to different time frames. The source of the more detailed figures reported in the latter is the FAO Fisheries Circular No. 821, Rev. 6. [Laurenti, G. (comp.) 1961-1999. Fish and fishery products: world apparent consumption statistics based on food balance sheets], which was compiled using statistics held in the FAO fishery statistical database in August 2001. The world total data presented in the Overview (Tables 1 and 2) are based on more recent production figures of March 2002, which also incorporated historical revisions. The food fish supply data in Tables 1 and 2 are indicative and may be subject to further revision when the food balance sheets are updated.