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The State of World Fisheries and Aquaculture 2008

New horizons in challenging times

The world financial crisis, and increases and fluctuations in food and energy prices, combined with the effects of climate change, are recasting the global landscape. Although the complex social and economic impacts are only beginning to play out, unprecedented challenges are emerging across all sectors and in all regions. For fisheries and aquaculture, this means taking advantage of new opportunities while minimizing threats.

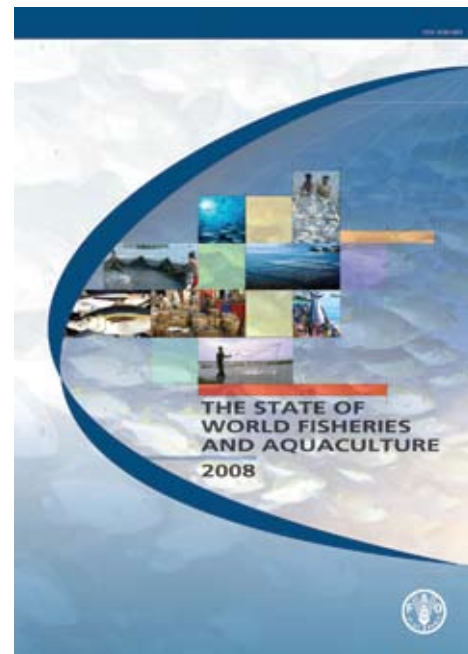
Energy costs and the prices of basic foodstuffs rose rapidly worldwide in the second half of 2007 and the first half of 2008, affecting fish prices and causing a slight setback in demand. It is expected, nonetheless, that in the long term the **global demand for fish will continue to increase**, in a manner consistent with the pattern of recent decades.

In 2006, the world consumed 110.4 million tonnes of fish – 51.7 million tonnes from aquaculture. If overall production is to keep pace with an expanding world population and given the strong likelihood that capture fisheries will remain stagnant, **future growth will have to come from aquaculture**.

Any development in aquaculture should be made with a view to diminishing reliance on wild stocks (as such reliance can undermine the health of these stocks). This is an opportunity to move from capture-based to

KEY MESSAGES

- Aquaculture continues to be the fastest-growing animal food-producing sector and, for the first time, is able to provide half of all fish consumed worldwide. Future developments should move towards hatchery-based aquaculture, cutting dependence on wild stocks.
- Actions are urgently needed to mitigate the factors driving climate change, as well as to adopt adaptation measures aimed at countering the threats to food and livelihood provision.
- The role of small-scale fishers must be enhanced in order to tap their full potential in society and improve their livelihoods. Integrated development initiatives should create or strengthen cross-linkages among, *inter alia*, literacy, housing, social security, health and infrastructure.
- The accident rate in the fishing industry remains unacceptably high. To address this issue, an international plan of action on safety at sea could be developed and promoted as part of the FAO Code of Conduct for Responsible Fisheries.
- The maximum potential from the world's oceans in terms of production from wild living marine resources has probably been reached, necessitating more closely controlled approaches to fisheries management in order to tackle the economic losses that currently characterize many capture fisheries and to reduce fishing capacity to levels commensurate with sustainable levels of harvesting.
- Private standards and certification schemes should be reconciled with the public sector's task of regulating the use of responsible practices in fisheries and aquaculture throughout the food chain.



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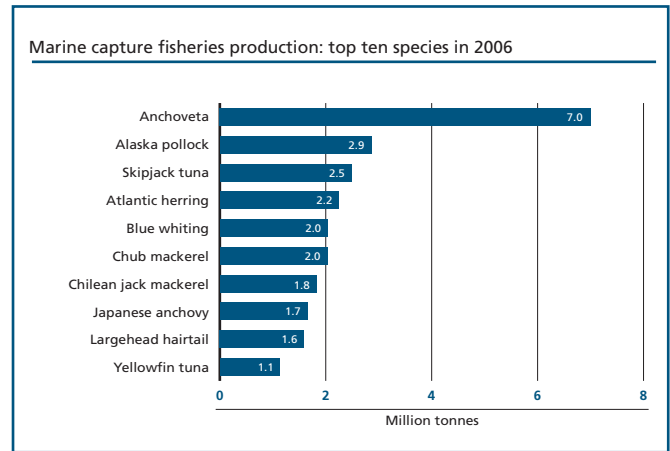
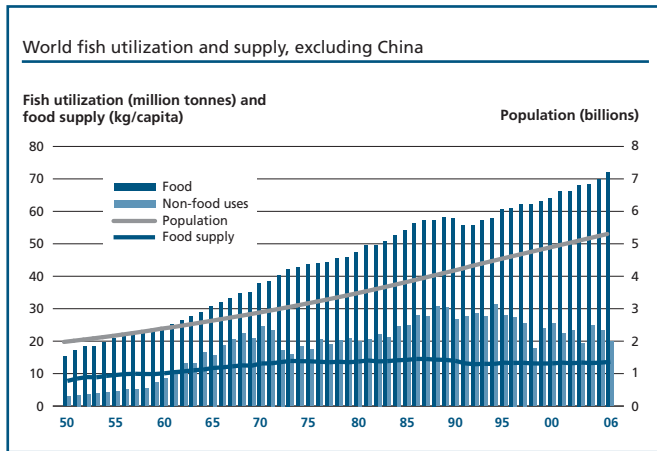
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The State of World Fisheries and Aquaculture, the flagship publication of the FAO Fisheries and Aquaculture Department, presents a world review of fisheries and aquaculture, including trends and statistics. It highlights issues debated worldwide and profiles future scenarios with a view to providing the most current global view and perspective on fisheries and aquaculture.

This report is accompanied by the latest edition of the *FAO World Fisheries and Aquaculture Atlas* CD-ROM, a comprehensive and global view of marine and inland capture fisheries and aquaculture.



hatchery-based practices and to enhance selective breeding methods. Constraints, particularly dependence on broodstock, seed and feeds, must be reduced so that the industry can benefit from gains similar to those long enjoyed by the livestock industry, especially those of selective breeding.

World exports of fish and fishery products reached US\$85.9 billion in 2006, with further **strong growth in trade expected**. Prices of fishery products followed the general upward trend of all food prices in the course of 2007 and the first half of 2008 – the first time in decades that real prices of fish have increased. The overall long-term trend is positive, with a rising share of both developed and developing country production arriving in international markets.

Growing consumer and retail power has given voice to concerns about human health and the social and environmental impacts of fishers and aquaculture. As a result, private **standards and certification schemes have proliferated throughout the supply chain**. Designed to trace the origin of food products (and ensure their quality and safety), they are also beginning to focus on environmental and social conditions. Such schemes, which can sometimes distort markets and lead to discriminatory treatment of certain products or countries, should be in line with international frameworks to promote science-based standards and harmonization.

As the demand for fish keeps growing, so must the **sustainability of aquatic resources**. Many marine fishery stocks, while holding steady in terms of exploitation, are still threatened by overfishing whereas a review of inland fish stocks – rivers, lakes, etc. – shows that there is room for development provided it is coupled with appropriate precautionary management approaches.

Fisheries management has generally shifted from production and development policies towards management and sustainability policies. A sharp focus on **capacity building for fisheries management is a priority** for both developing and developed countries, particularly as globalization strengthens their interdependence.

Threats can generate opportunities

Climate change threatens the sustainability of both capture fisheries and aquaculture development.

Gradual global warming and associated physical changes, plus an increased frequency of extreme weather events, are exacerbating the pressures on natural resources and ecosystems. Climate variations will affect food and livelihood provision, with some fishery-dependent communities facing decreased availability of fish, increased production costs and reduced trade opportunities. However, changes in species distribution and abundance could create new markets. Measures are urgently needed to minimize negative impacts and to exploit opportunities.

Fishing at sea is probably the most dangerous occupation in the world – an estimated 24 000 deaths occur each year. The main causes are not only poorly designed, constructed or equipped vessels, but also inappropriate human behaviour and a simple lack of awareness of safety issues and good practices. Developing guidelines on best practices and actions to improve safety (underpinned by public pressure for better health and safety conditions on vessels) – possibly including an international plan of action – provides an opportunity to address the issue in a holistic fashion.

About 520 million people – or 8 percent of the world's population – depend on fisheries for their well-being, whether as a source of protein, income or family stability. Most fishers are small-scale, artisanal fishers. **Small-scale fishing communities, often poor, vulnerable and marginalized, contribute significantly to local economies** – and the potential for growth is enormous. Where fish is produced and processed locally, the net income benefit to the community is more than twice the value of the fish sales. Increasing the role of small-scale fisheries as contributors to poverty alleviation and food security should be a priority, yet government policy agendas tend to give little weight to such issues.