What is FAO?

Food and Agriculture Organization of the United Nations

- Established to lead international efforts to defeat world hunger
- Acts as a neutral forum to direct global policy
- Gathers and disseminates information about food production and markets
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FIPM?

Fish Products, Trade and Marketing service – a branch of the FAO Fisheries Department
- Deals with fish *all along the supply chain*
- Runs technical assistance projects in developing countries, helps formulate best practice guidelines
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Status and Trends of Global Fisheries & Aquaculture

Production

- Aquaculture
- Capture fisheries

Trade and markets

- Market access
- Traceability
- Certification
- Prices & projections
- Trade & market trends
- Fish & nutrition
PRODUCTION
Capture fisheries today

**Marine Fisheries**

- Large proportion either **fully utilized** or **over-exploited**
- Limited potential for increased production

**In-Land Fisheries**

- Some stocks collapsed or collapsing
- But many remain **underutilized**
- Lack of data
Aquaculture vs capture production
1950 - 2012

Capture  Aquaculture

Source: FishstatJ & Globefish Highlights (2013)
Note: 2011 & 2012 estimated figures
Aquaculture vs capture in global production
1950 - 2022 (FAO-OECD projections)

Source: FishstatJ & Globefish Highlights (2014)
Note: 2012 & 2013 estimated figures
TRADE AND MARKETS
Market access

• Import Tariffs:
  – low on most imports by developed countries
  – but remain high on developing country imports
  – High tariffs are barriers to regional trade
Traceability and certification in the Supply Chain

Globalization of supply chains (separation of producer and consumer) + Concerns about food safety and quality assurance + Consumer awareness of fisheries sustainability issues

= Growing need for traceability mechanisms and guidelines and certifications

Are costs and benefits equally distributed along the supply chain?

Balance between need for traceability and minimizing unnecessary barriers to trade?
• Traceability best practice guidelines currently being developed through FAO consultancy
  • First draft submitted at COFI-ST 2014

• Multiple FAO projects currently underway with traceability components
  • Review of traceability systems for small pelagics in developing regions

• FAO is particularly concerned with facilitating market access to developed markets for producers in developing countries, e.g. by their compliance with traceability and certification requirements
  • Focus on small-scale fishers
Growing number of ecolabels may confuse consumer

What’s the difference? Which is the best?

More means less – value of each individual label decreases

→ Need for harmonization of standards

FAO’s Guidelines

Guidelines for the Ecolabelling of fish and fishery products from marine capture fisheries (2005)

Guidelines for the Ecolabelling of Fish and Fishery Products from Inland Capture Fisheries (2010)
GLOBAL SEAFOOD SINCE 1976

Income growth + Urbanisation + Product development

Fish supply per capita
Seafood exports

KG per capita per year
Millions of tonnes

World per capita supply of all meats, by type

Kg per capita per year

Bovine Meat
Mutton & Goat Meat
Pigmeat
Poultry Meat
All seafood
Pelagic Fish
Linear (All seafood)

Source: FAOstat (2014)
World per capita fish consumption map by major species group
2009
World fish trade - major importers
2011 to 2013

Note: 2013 estimated, EU includes intra-EU
Source: Globefish Highlights (2014)
Global market trends

Strong growth: now 4th **biggest importer** and **biggest exporting country**
Steadily increasing per kaput consumption: 31 kg/kaput

long-term growth: **# 1 market** (EU 28)
rising population and stable consumption at 23 kg/kaput
increasing import dependence

long-term growth, overtaking Japan as **# 1 importing country**
rising population and stable consumption 24 kg/kaput

**long-term decline** in fish consumption and imports of meat>fish.
high consumption but falling: 57 kg/kaput
World fish trade - major exporters
2011 to 2013

<table>
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<th>Year</th>
<th>China</th>
<th>REST OF ASIA</th>
<th>SOUTH AMERICA</th>
<th>EU</th>
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Source: Globefish Highlights (2014)
PRICES
Fish Price Index by Species Group
1990 - 2013
Total fish consumption, OECD-FAO projections

Source: OECD-FAO Agricultural Outlook 2013
Total fish consumption, OECD-FAO projections

Source: OECD-FAO Agricultural Outlook 2013

Millions of tonnes

DEVELOPED
DEVELOPING
% for food (developed)
% for food (developing)
Fishmeal production & consumption, OECD-FAO projections

Source: OECD-FAO Agricultural Outlook 2013

Thousands of tonnes

Consumption (developed countries)

Total production

Consumption (developing countries)

% FROM WHOLE FISH

Consumption (developed countries)
FISH AND NUTRITION
Use of pelagics for direct human consumption increasing

BUT major stocks such as anchoveta still utilised for fishmeal and fish oil

Market development for human consumption is driven by income growth, lack of marine seafood alternatives, increased awareness of nutritional value of pelagic species

Small pelagics have great potential as a highly nutritious, cheap food source particularly for nutrient deficient populations
Fish & Nutrition

Fish provides many valuable nutrients

- protein
- long-chain omega-3 fatty acids
- fat-soluble vitamins
- minerals like iron, calcium, iodine, zinc & selenium

With numerous health benefits

- (known) reduced risk of cardiac death, aids neurodevelopment in unborn infants
- (probable) reduced risk of stroke, (possible) reduced risk of depression

Which are important in developing countries

- fish provides nutrients where they are most needed
- cheap small pelagics growing component of developing country diets
CONCLUSIONS
Code of Conduct for Responsible Fisheries

- Sets out principles and international standards for responsible practices with respect to the goals of conservation, management and development

- FAO actively promoting its implementation and monitoring progress

- Internationally agreed but non-binding
CONCLUSIONS

- SUPPLY INCREASES THANKS TO AQUACULTURE
  - BUT FISHERIES MANAGEMENT STILL AN ISSUE

- WORLD TRADE IS INCREASING
  - BUT SHARE OF 3 BIG MARKETS DECLINING
  - ROLE OF CHINA

- FISH’S NUTRITIONAL VALUE

- PRICES TO RISE STRONGLY

- IMPORTANCE OF TRACEABILITY, LABELING AND CERTIFICATIONS

- MARKET ACCESS REMAIN A CHALLENGE
THANK YOU

www.globefish.org