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Global trade in fish and fishery products: An overview

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ABSTRACT

Global trade in fishery products plays a significant role in shaping the harvesting and use of fish, and therefore will be an important part of a transition to sustainable fisheries. This article provides an overview of global trade flows in fish and fishery products as well as future trends affecting the sector. It then moves on to review trade policy measures applied in major producing and importing countries, including tariff, non-tariff measures, and fisheries subsidies. It ends with an overview of recent developments in international frameworks governing trade in fish and fishery products at the global, regional and national levels.

1. The global trade landscape

Fish and fishery products are among the most traded food commodities worldwide. The share of total production that is exported increased significantly from 25 percent in the mid-1970s to nearly 37 percent in 2012, reflecting the sector's growing degree of integration in the global economy [1]. In recent years, liberalisation policies, technological innovations, improvements in processing, packaging, and transportation, as well as changes in distribution and marketing, have further accelerated this trend, while facilitating the emergence of complex supply chains in which goods often cross national borders several times before final consumption.

Fig. 1 provides an overview of the value of global trade flows by major regions. While developing Asia, Oceania, and Latin America and the Caribbean have consolidated their role as net fisheries exporters, the EU and the US continue to show consistent trade deficits in fish and fishery products. It should be noted, however, that expressed in volume terms such deficit are significantly smaller. By value, Africa was a net exporter for the period 1985–2010, but a net importer since 2011. However, Africa has long been a net importer in quantity terms, reflecting the lower unit value (price) of imports [1]. The European Union imports – excluding intra-EU trade-accounted for nearly a quarter of the value of global imports in 2012, making it by far the largest import market followed by the United States, Japan and China[1]. On the export side, China alone accounts for nearly 15 percent of the value of total exports followed by Norway, Thailand and Vietnam. Emerging economies such as Brazil, Mexico Russia or Egypt are also playing an increasing role in exports [1]. Overall, developing countries whose exports represented just 34 percent of world trade in 1982, saw their share rise to 54 percent of total fishery export value by 2012. For these countries, fisheries represent a critical source of export earnings, job creation, income generation, and ultimately growth and development, with net exports largely exceeding those of other agricultural commodities such as rice, meat, sugar, or coffee [1].

For several smaller exporters, fish and fishery products also represent a considerable share of total merchandise trade, highlighting the critical importance of trade in this sector for job creation, income generation, and ultimately growth and development. Fig. 2 illustrates this point by looking at the average share of fisheries in total exports of the top exporting LDCs and SIDS over

[1] It should be noted however that the rapid increase in China's imports observed over the last few years is partly a result of surging domestic consumption but also of outsourcing, with China importing raw material from all major regions, for processing and re-export. This phenomenon reflects the growth of global value chains, where fish may be caught in one part of the world, processed in another, and consumed in a third.

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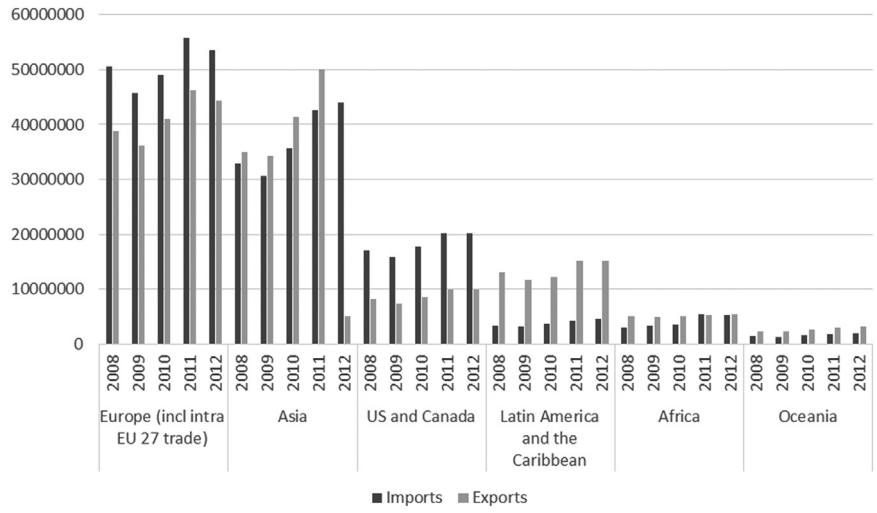

Fig. 1. Fishery Trade Flows by Regions (USD '000). *Source*: FAOSTAT.

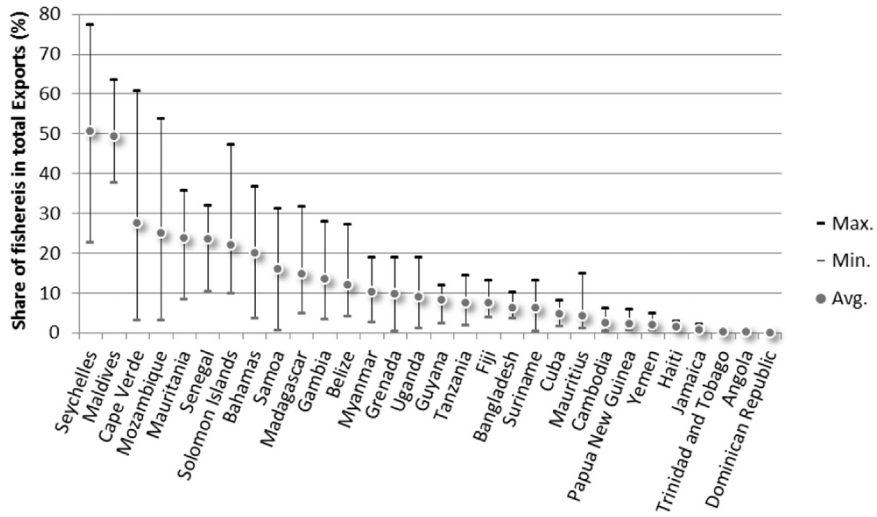

Fig. 2. Share of Fisheries Exports in Total Exports of Top Least Developed and Small Island Exporters, 1990–2009. *Source*: Author's calculations based on FAOSTAT database and WTO Tariff and Trade Database.

the last two decades. In countries like the Seychelles, Maldives, Cape Verde, and Mozambique, fisheries represented between 25 percent and 50 percent of total merchandise exports, with this share rising to 60 percent or even 75 percent in certain years. This very high level of reliance on fisheries resources suggests these countries may be particularly vulnerable if the health of the fish stock decline as a result of overfishing, or if fish stocks move as a result of climate change.

2. Future trends in prices and trade

The 2015 *OECD-FAO Agricultural Outlook* [2] predicts that over the next ten years, per capita fish consumption will continue to increase in all continents, with Asia showing the fastest growth. Responding to increased demand, production will expand by 19 percent between the 2012–14 base period and 2024, to reach 191 million tonnes. This growth is likely to be mainly driven by aquaculture, which is expected to increase by 38 percent over the period 2012–14–2024, particularly in Asia. In 2023, aquaculture will surpass total capture fisheries even if the capture sector will remain dominant for a number of species and vital for domestic and international food security. The expansion of aquaculture might, however, face certain limitations, including water constraints; limited availability of optimal production locations; and the rising costs of fishmeal, fish oil, and other feeds.

Fish prices are influenced by demand and supply factors, including the costs of production and transportation, but also of alternative commodities, including meat and feeds. Changing diets, rising incomes, and urbanisation will likely lead to enhanced consumption of meat, including fish in fillets or prepared and preserved forms and should continue to sustain high agricultural prices, particularly for meat, fish, and biofuels. In addition, there are supply-reducing factors such as a limited potential for increased capture fisheries production and cost pressure from some crucial inputs (for example, fishmeal, fish oil and other feeds) in aquaculture [3]. Fish and fishery products will remain highly traded commodities with 31 percent of total production going to export in 2024.

3. The role of trade policy

3.1. Tariff barriers

Fish and fish products are considered industrial products in the