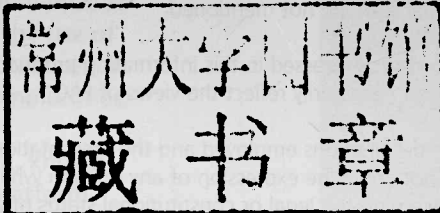


THE STATE OF WORLD FISHERIES AND AQUACULTURE 2012



THE STATE OF WORLD FISHERIES AND AQUACULTURE

2012



FAO Fisheries and Aquaculture Department

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

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FOREWORD

Today, the global community faces multiple and interlinked challenges ranging from the impacts of the ongoing financial and economic crisis to greater climate change vulnerabilities and extreme weather events. At the same time, it must also reconcile meeting the pressing food and nutrition needs of a growing population with finite natural resources. This edition of *The State of World Fisheries and Aquaculture* shows how these issues affect fisheries and aquaculture sector and how the sector is attempting to address them in a sustainable manner.

Fisheries and aquaculture make crucial contributions to the world's well-being and prosperity. In the last five decades, world fish food supply has outpaced global population growth, and today fish constitutes an important source of nutritious food and animal protein for much of the world's population. In addition, the sector provides livelihoods and income, both directly and indirectly, for a significant share of the world's population.

Fish and fishery products are among the most traded food commodities worldwide, with trade volumes and values reaching new highs in 2011 and expected to carry on rising, with developing countries continuing to account for the bulk of world exports. While capture fisheries production remains stable, aquaculture production keeps on expanding. Aquaculture is set to remain one of the fastest-growing animal food-producing sectors and, in the next decade, total production from both capture and aquaculture will exceed that of beef, pork or poultry.

However, in a world in which almost a billion people still suffer from hunger, it is the poor, especially those in rural areas, who are most vulnerable to the combination of threats outlined above. In many areas of sub-Saharan Africa and South Asia, their fish consumption levels remain too low and they are failing to benefit from the contributions that fisheries and aquaculture are increasingly making elsewhere in terms of sustainable food security and income.

The vital contributions from fisheries and aquaculture to global food security and economic growth remain constrained by an array of problems. These include poor governance, weak fisheries management regimes, conflicts over the use of natural resources, the persistent use of poor fishery and aquaculture practices, a failure to incorporate the priorities and rights of small-scale fishing communities, and injustices relating to gender discrimination and child labour.

The recent United Nations Conference on Sustainable Development, known as Rio+20, discussed these governance-related issues and served as a platform to renew political commitment for sustainable development, assess progress and gaps in the implementation of existing commitments, and address new challenges. Two themes underpinning Rio+20 – the institutional framework for sustainable development and the support of a green economy – were reflected in FAO's main message that improved management and efficiencies throughout the food value chain can increase food security while using fewer natural resources, i.e. achieve more with less. A special focus on oceans and coasts at Rio+20 enabled FAO to voice its recommendations on questions ranging from improving the sustainable use of marine and coastal resources through to poverty eradication, small-scale fisheries and aquaculture operations, as well as the potential contribution of small island developing States.

Promoting sustainable fishing and fish farming can provide incentives for wider ecosystem stewardship. The greening of fisheries and aquaculture requires recognition of their wider societal roles within a comprehensive governance framework. There are several mechanisms to facilitate this transition, including

adopting an ecosystem approach to fisheries and aquaculture with fair and responsible tenure systems to turn resource users into resource stewards.

In addition to the efforts of government institutions, enabling fisheries and aquaculture to flourish responsibly and sustainably requires the full involvement of civil society and the private sector. Business and industry can help develop technologies and solutions, provide investment and engender positive transformation. Civil society and international and local non-governmental organizations can hold governments accountable on agreed commitments and ensure that the voices of all stakeholders are heard and represented.

Efforts to foster good governance for responsible and sustainable fisheries and aquaculture should include widespread adoption and implementation of the principles enshrined in the Code of Conduct for Responsible Fisheries, as well as of the provisions of the international guidelines currently under development for securing sustainable small-scale fisheries. It is also necessary to ensure the uptake and application of relevant international instruments, in particular the 2012 Voluntary Guidelines on the Responsible Governance of Tenure of Land, Fisheries and Forests, and to provide support to initiatives such as the GEF/FAO Global Sustainable Fisheries Management and Biodiversity Conservation in Areas Beyond National Jurisdiction, the World Bank's Global Partnership for Oceans and the UN Secretary-General's Ocean Compact.

To ensure that ecological well-being is compatible with human well-being, and to make long-term sustainable prosperity a reality for all, it is necessary to strike the right balance between seizing opportunities and addressing threats in the use of technology and natural resources, in applying sound economic and policy decisions and in preserving environmental integrity and social licence.

It is my sincere hope that this issue of *The State of World Fisheries and Aquaculture* will serve as a useful reference work on the sector – its status, trends, issues and outlook – and that it will contribute to a more complete understanding of the sector's key role in shaping our world.

Arni M. Mathiesen

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ABBREVIATIONS AND ACRONYMS



CAC

Codex Alimentarius Commission

CACFISH

Central Asian and the Caucasus Fisheries and Aquaculture Commission

CBD

Convention on Biological Diversity

CCA

climate change adaptation

CCAMLR

Commission for the Conservation of Antarctic Marine Living Resources

CCSBT

Commission for the Conservation of Southern Bluefin Tuna

CDS

catch documentation scheme

CECAF

Fishery Committee for the Eastern Central Atlantic

CIFAA

Committee for Inland Fisheries and Aquaculture of Africa

CITES

Convention on International Trade in Endangered Species of Wild Fauna and Flora

CODE

Code of Conduct for Responsible Fisheries

COFI

FAO Committee on Fisheries

COP

Code of Practice

COREP

Regional Fisheries Committee for the Gulf of Guinea

CPUE

catch per unit of effort

DRM

disaster risk management

DRR

disaster risk reduction

EAA

ecosystem approach to aquaculture

EAf

ecosystem approach to fisheries

EC

European Commission

ECOSOC

United Nations Economic and Social Council

EEZ

exclusive economic zone

EIFAAC

European Inland Fisheries and Aquaculture Advisory Commission

EIFAC

European Inland Fishery Advisory Commission

FCR

feed conversion ratio

FCWC

Fishery Committee for the West Central Gulf of Guinea

GFCM

General Fisheries Commission for the Mediterranean

GHG

greenhouse gas

HACCP

Hazard Analysis and Critical Control Point (system)

HFA

Hyogo Framework for Action

HUFA

highly unsaturated fatty acid

IATTC

Inter-American Tropical Tuna Commission

ICCAT

International Commission for the Conservation of Atlantic Tunas

IMO

International Maritime Organization

IOTC

Indian Ocean Tuna Commission

ISO

International Organization for Standardization

ITQ

individual transferable quota

IUU

illegal, unreported and unregulated fishing

LDC

least-developed country

LIFDC

low-income food-deficit country

LIFE

low-impact fuel-efficient

LOA

length overall

MDG

Millennium Development Goal

MPA

marine protected area

NAFO

Northwest Atlantic Fisheries Organization

NASCO

North Atlantic Salmon Conservation Organization

NEAFC

North East Atlantic Fisheries Commission

NEI

not elsewhere included

NGO

non-governmental organization

NOAA

National Oceanic and Atmospheric Administration (the United States of America)

NPAFC

North Pacific Anadromous Fish Commission

OECD

Organisation for Economic Co-operation and Development

OSPESCA

Organization of Fishing and Aquaculture in Central America

PERSGA

Regional Organization for the Conservation of the Environment of the Red Sea and Gulf of Aden

RFB

regional fishery body

RFMO

regional fisheries management organization

R&D

research and development

SAR

search and rescue

SEAFO

South East Atlantic Fisheries Organisation

SIOFA

Southern Indian Ocean Fisheries Agreement

SPRFMO

South Pacific Regional Fisheries Management Organisation

SPS AGREEMENT

Agreement on the Application of Sanitary and Phytosanitary Measures

SWIOFC

Southwest Indian Ocean Fisheries Commission

TBT AGREEMENT

Agreement on Technical Barriers to Trade

UNGA

United Nations General Assembly

WCPFC

Western and Central Pacific Fisheries Commission

WHO

World Health Organization

WTO

World Trade Organization

CONTENTS



Foreword	iii
Acknowledgements	xi
Abbreviations and acronyms	xii

PART 1

WORLD REVIEW OF FISHERIES AND AQUACULTURE

Status and trends	3
Overview	3
Capture fisheries production	19
Aquaculture	24
Fishers and fish farmers	41
The status of the fishing fleet	47
The status of fishery resources	52
Fish utilization and processing	63
Fish trade and commodities	67
Fish consumption	82
Governance and policy	89
Notes	100

PART 2

SELECTED ISSUES IN FISHERIES AND AQUACULTURE

Mainstreaming gender in fisheries and aquaculture: from recognition to reality	107
The issue	107
Possible solutions	111
Recent actions	113
Outlook	113
Improved preparedness for and effective response to disasters in fisheries and aquaculture	114
The issue	114
Possible solutions	117
Recent actions	120
Outlook	121
Managing recreational fisheries and their development	121
The issue	121
Possible solutions	123
Recent actions	125
Outlook	125
Barriers to achieving low-impact fuel-efficient fishing	126
The issue	126
Possible solutions	127
Recent actions	133
Outlook	134
Putting into practice the ecosystem approach to fisheries and aquaculture	135
The issue	135
Possible solutions	135
Recent actions	140
Outlook	141
Notes	142

PART 3

HIGHLIGHTS OF SPECIAL STUDIES

Effects of fisheries management policies on fishing safety	151
Methods	151
Results	153
Discussion	155
Conclusions and follow-up	157
Food safety remains a critical component for food and nutrition security	157
Introduction	157
Development of food safety and quality systems	158
Risk analysis	159
Example of risk analysis leading to development of seafood	
safety standards	159
Seafood quality	160
Safety management systems	160
The regulatory framework	161
Climate change and food safety	162
Impact on developing countries	162
Marine protected areas: a tool for the ecosystem approach to fisheries	164
Introduction	164
Background	165
Planning and implementation: lessons learned	168
The way forward	171
Demand and supply of aquafeed and feed ingredients for farmed fish and crustaceans: trends and future prospects	172
Introduction	172
Aquaculture growth and aquafeed	172
Aquafeed production and use	173
Feed ingredient production and availability	174
Current feed ingredient usage and constraints	176
Conclusion	180
Issues to be addressed	181
Global guidelines on ecolabelling and certification in capture fisheries and aquaculture	181
Introduction	181
The Marine Guidelines	182
The Inland Guidelines	183
The Aquaculture Guidelines	184
Evaluation framework	185
Remaining issues	186
The OECD–FAO Agricultural Outlook: chapter on fish	186
The model	186
Projections 2012–2021	188
Notes	194

PART 4

OUTLOOK

The role of capture fisheries in a global sustainable food production system: opportunities and challenges	199
Context	199
The prospects for sustainable increased production	199
Capture fisheries as targets of efforts to reduce resource use and greenhouse gas emissions	204
Minimizing waste	205
Improving governance	205
Notes	207

TABLES

Table 1	World fisheries and aquaculture production and utilization	3
Table 2	Countries or territories with no adequate 2009 catch data submission	20
Table 3	Inland capture fisheries production by continent and major producer	23
Table 4	Number of species items with statistics in the FAO capture database	24
Table 5	Aquaculture production by region: quantity and percentage of world total production	27
Table 6	Top ten regional and world aquaculture producers in 2010	28
Table 7	World fishers and fish farmers by region	41
Table 8	Number fishers and fish farmers in selected countries and territories	43
Table 9	Fishery production per fisher or fish farmer by region in 2010	46
Table 10	Proportion in terms of length of motorized vessels in fishing fleets from selected nations in different regions	50
Table 11	Motorized fishing fleets in selected countries, 2000–2010	51
Table 12	Top ten exporters and importers of fish and fishery products	71
Table 13	Total and per capita food fish supply by continent and economic grouping in 2009	84
Table 14	Study hypotheses	152
Table 15	Comparison of accident rates in French scallop fisheries	154
Table 16	Reduction in fishmeal inclusion in compound aquafeed of different fish species and species groups	178
Table 17	Feed ingredient usage for major aquaculture species and species groups	179

FIGURES

Figure 1	World capture fisheries and aquaculture production	4
Figure 2	World fish utilization and supply	4
Figure 3	World capture fisheries production	5
Figure 4	Recent capture fisheries production by three major components	19
Figure 5	Catch trend for Argentine red shrimp	22
Figure 6	Catch trends for marine bivalve species groups	22
Figure 7	World aquaculture production of non-fed and fed species	34
Figure 8	World aquaculture production and relative share by culture environment	34
Figure 9	World aquaculture production composition by culture environment	35
Figure 10	Production of major species or species group from aquaculture in 2010	38
Figure 11	World production of farmed aquatic plant (algae) by major species or species group	40
Figure 12	Employment in the fisheries sector for the period 1990–2010	42
Figure 13	Proportion of fishing vessels in marine and inland waters by region in 2010	48
Figure 14	Proportion of marine fishing vessels with and without engine by region in 2010	48
Figure 15	Distribution of motorized fishing vessels by region in 2010	48
Figure 16	Size distribution of fishing vessels by region in 2010	49
Figure 17	Capture fisheries production in marine areas	54
Figure 18	Global trends in the state of world marine fish stocks since 1974	56
Figure 19	Utilization of world fisheries production (breakdown by quantity), 1962–2010	63
Figure 20	Utilization of world fisheries production (breakdown by quantity), 2010	65
Figure 21	World fisheries production and quantities destined for export	68
Figure 22	Average fish prices in real terms (2005)	69
Figure 23	Net exports of selected agricultural commodities by developing countries	72
Figure 24	Trade flows by continent (total imports in US\$ millions, c.i.f.; averages for 2008–2010)	74

Figure 25	Imports and exports of fish and fishery products for different regions, indicating net deficit or surplus	76
Figure 26	Shrimp prices in Japan	78
Figure 27	Groundfish prices in the United States of America	78
Figure 28	Skipjack tuna prices in Africa and Thailand	79
Figure 29	Octopus prices in Japan	80
Figure 30	Fishmeal and soybean meal prices in Germany and the Netherlands	81
Figure 31	Fish oil and soybean oil prices in the Netherlands	81
Figure 32	Total protein supply by continent and major food group (average 2007–2009)	82
Figure 33	Contribution of fish to animal protein supply (average 2007–2009)	83
Figure 34	Fish as food: per capita supply (average 2007–2009)	83
Figure 35	Relative contribution of aquaculture and capture fisheries to food fish consumption	86
Figure 36	Natural disasters reported worldwide, 1900–2010	115
Figure 37	The disaster risk management cycle	118
Figure 38	A new semi-pelagic low-impact and selective trawl gear (CRIPS-trawl) that is under development in Norway	128
Figure 39	Smart trawling: reduced seabed damage of bottom trawling	130
Figure 40	A floating pot	131
Figure 41	The EAF/EAA planning framework	137
Figure 42	Global consumption of fishmeal and fish oil by major aquaculture species groups in 2008	176
Figure 43	Actual and predicted reduction in fishmeal use relative to the global production of compound aquafeed	177
Figure 44	Meat and fishery production, dressed weight or eviscerated basis	188
Figure 45	Fishmeal production in product weight	189
Figure 46	General growth in fish prices for high feed costs and strong demand, nominal terms	190
Figure 47	Per capita fish consumption	191
Figure 48	Fishery production in live weight equivalent	192

BOXES

Box 1	Improvements in China's fishery and aquaculture statistics	6
Box 2	Fish culture in rice fields	30
Box 3	Child labour – an important issue also in fisheries and aquaculture	44
Box 4	Developing an assessment strategy for inland fishery resources	60
Box 5	The work of the Codex Alimentarius Commission	64
Box 6	An update on the 2009 Port State Measures Agreement	96
Box 7	A gender baseline in the fisheries and aquaculture sector	108
Box 8	The contribution of women in the aquaculture sector	109
Box 9	Differences in power lead to different opportunities	110
Box 10	Quantifying inequalities	111
Box 11	Disaster management and climate change adaptation: key definitions	117
Box 12	Fishing vessels and fuel consumption	126
Box 13	The need for an ecosystem approach in inland waters	136
Box 14	Interactions between fisheries and aquaculture	138
Box 15	The Hazard Analysis and Critical Control Point system and prerequisite programmes	160
Box 16	An Indian success story	163
Box 17	Marine protected areas, fisheries and the Code	165
Box 18	Freshwater protected areas	166
Box 19	Different national definitions of marine protected area	167
Box 20	Examples of national institutional MPA arrangements	169
Box 21	Tools for analysis and prioritization	171
Box 22	Fed fish and non-fed fish	173
Box 23	Reconciling sustainable inland fisheries with the needs of other sectors	202

Notes: Unless otherwise stated, the source of data for the figures and tables is FAO. Data for China do not include: Taiwan Province of China; China, Hong Kong Special Administrative Region; and China, Macao Special Administrative Region.



PART 1

**WORLD REVIEW OF FISHERIES
AND AQUACULTURE**