

COMMITTEE ON FISHERIES
COMITÉ DES PÊCHES
COMITÉ DE PESCA

Report of the thirteenth session of the

SUB-COMMITTEE ON FISH TRADE

Hyderabad, India, 20–24 February 2012

Rapport de la treizième session du

SOUS-COMITÉ DU COMMERCE DU POISSON

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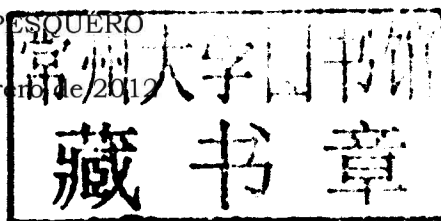
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PREPARATION OF THIS DOCUMENT

This is the final report approved by the thirteenth session of the Sub-Committee on Fish Trade of the Committee on Fisheries.

PRÉPARATION DE CE DOCUMENT

Le présent document est le rapport final approuvé par le Sous-Comité du commerce du poisson du Comité des pêches à sa treizième session.

PREPARACIÓN DEL PRESENTE INFORME

Este es el informe final aprobado por la decimotercera reunión del Subcomité de Comercio Pesquero del Comité de Pesca.

FAO Committee on Fisheries/Comité des pêches/Comité de Pesca.

Report of the thirteenth session of the Sub-Committee on Fish Trade. Hyderabad, India, 20–24 February 2012.

Rapport de la treizième session du Sous-Comité du commerce du poisson. Hyderabad, Inde, 20-24 février 2012.

Informe de la decimotercera reunión del Subcomité de Comercio Pesquero. Hyderabad, India, 20-24 de febrero de 2012.

FAO Fisheries and Aquaculture Report/FAO Rapport sur les pêches et l'aquaculture/FAO Informe de Pesca y Acuicultura. No. 996. Rome/Roma, FAO. 2012. 71 pp.

ABSTRACT

The Committee on Fisheries established the Sub-Committee on Fish Trade to serve as a multilateral framework for consultations on international trade in fishery products. The thirteenth session of the Sub-Committee was held in Hyderabad, India, from 20 to 24 February 2012.

The Sub-Committee took note of recent developments concerning international trade in fishery products. It also considered specific issues related to international trade and sustainable fisheries development, including:

- harmonized system of classification for fish products;
- safety and quality of fishery products;
- best practice guidelines for traceability;
- FAO evaluation framework to assess the conformity of public and private ecolabelling schemes with the FAO Guidelines for the Ecolabelling of Fish and Fishery Products from Marine Capture Fisheries;
- value chain analysis and international fish trade;
- fish trade and the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES); and
- monitoring implementation of Article 11 (post harvest practices and trade) of the Code of Conduct for Responsible Fisheries.

In its capacity as the International Commodity Body for Fishery Products, the Sub-Committee endorsed three project proposals for funding by the Common Fund for Commodities.

RÉSUMÉ

Le Comité des pêches a établi le Sous-Comité du commerce du poisson afin qu'il serve de cadre multilatéral aux consultations relatives au commerce international des produits de la pêche. La treizième session du Sous-Comité s'est tenue à Hyderabad (Inde) du 20 au 24 février 2012.

Le Sous-Comité a pris note de l'évolution récente concernant le commerce international des produits de la pêche. Il s'est également penché sur des questions particulières afférentes au commerce international et au développement durable des pêches, notamment:

- un système harmonisé de classement des produits de la pêche;
- la sécurité sanitaire et la qualité des produits de la pêche;
- des directives sur les pratiques optimales en matière de traçabilité;
- un cadre d'évaluation de la conformité des programmes publics et privés d'écolabellisation aux Directives de la FAO pour l'étiquetage écologique du poisson et des produits des pêches de capture marines;
- une analyse de la chaîne de valeur et du commerce international du poisson;
- le commerce du poisson et la Convention sur le commerce international des espèces de faune et de flore sauvages menacées d'extinction (CITES);
- Enfin, le suivi de l'application de l'Article 11 (pratiques après capture et commerce) du Code de conduite pour une pêche responsable.

En qualité d'organisme international de produit pour les produits de la pêche, le Sous-Comité a approuvé quatre propositions de projet en vue de leur financement par le Fonds commun pour les produits de base.

RESUMEN

El Comité de Pesca estableció el Subcomité de Comercio Pesquero para que sirviera de marco multilateral en el que celebrar consultas sobre el comercio internacional de productos pesqueros. La 13.^a reunión del Subcomité de Comercio Pesquero se celebró en Hyderabad (India) del 20 al 24 de febrero de 2012.

El Subcomité tomó nota de los acontecimientos recientes en relación con el comercio internacional de productos pesqueros. También examinó cuestiones específicas relativas al comercio internacional y el desarrollo sostenible de la pesca, tales como:

- el Sistema armonizado de clasificación en relación con los productos pesqueros;
- la inocuidad y calidad de los productos pesqueros;
- las directrices sobre las mejores prácticas para la rastreabilidad;
- el marco de evaluación de la FAO a fin de determinar la conformidad de los sistemas públicos y privados de ecoetiquetado con las Directrices de la FAO para el ecoetiquetado de pescado y productos pesqueros de la pesca de captura marina;
- el análisis de la cadena de valor y el comercio pesquero internacional;
- el comercio pesquero y la Convención sobre el comercio internacional de especies amenazadas de fauna y flora silvestres (CITES); y
- el seguimiento de la aplicación del Artículo 11 (Prácticas postcaptura y comercio) del Código de Conducta para la Pesca Responsable.

En su calidad de organismo internacional de productos básicos respecto de los productos pesqueros, el Subcomité refrendó tres propuestas de proyectos para su financiación por el Fondo Común para los Productos Básicos.

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MATTERS REQUIRING ATTENTION BY THE COMMITTEE ON FISHERIES

REPORT ON TRADE-RELATED ACTIVITIES IN FAO

Members underlined the importance of FAO's work in capacity-building for developing countries, in particular in relation to market access and value-addition for small-scale producers in developing countries. Members also noted the need for assistance on market identification, and in carrying out the analysis of national and international value-chains. (Para. 9)

The Sub-Committee encouraged FAO to make the focus on small-scale sector more explicit in its work programme, and to include the sector as a separate agenda item on the agenda of the Sub-Committee on Fish Trade at its next session. (Para. 10)

Members referred to the usefulness of the GLOBEFISH project in providing analysis and information on trends in international fish markets. The Sub-Committee also highlighted the important contribution in regional capacity building carried out by the FISH INFONetwork and encouraged FAO to continue its support and coordination of the Network. (Para. 11)

Members welcomed the inclusion of fish in the OECD-FAO 2011-2020 Agricultural Outlook and encouraged the further refinement of the model. The Sub-Committee noted the usefulness of FAO's fish price indexes and welcomed the improved integration of fisheries within the broader context of food production, trade, consumption and nutrition. (Para. 12)

The Sub-Committee noted the important work undertaken by the joint WHO-FAO Expert Consultation on the Risks and Benefits of Fish Consumption and encouraged FAO to communicate more extensively the findings. (Para. 13)

Members noted the growing role of ecolabels and certification arrangements and the difficulties and challenges these could present to all producers, and especially small-scale producers. (Para. 14)

The Sub-Committee encouraged FAO to continue the integration of FAO's fisheries related work with that of other FAO technical departments, including in the production of the FAO Food Outlook. Coordination should also continue with other international organizations, such as the Organisation for Economic Cooperation and Development (OECD), the World Trade Organization (WTO) and the World Bank. Members underlined FAO's important role in providing specialized technical expertise to the WTO, in particular for the fisheries subsidies negotiations, and encouraged FAO to play a more pro-active role in providing technical support to the WTO negotiations. (Para. 15)

The Sub-Committee expressed its support to the work of FAO related to the improvement of the Harmonized System of Classification for fish products and the continued collaboration with the World Customs Organization. (Para. 16)

Members welcomed the new customs' rules which classify landings abroad as exports. (Para. 17)

Members welcomed FAO's increased collaboration with the Statistics Division of the United Nations (UN) on issues related to improvement of classifications and the methodology used to collect statistics. (Para. 20)

RECENT DEVELOPMENTS IN FISH TRADE

The Sub-Committee noted the need for FAO to continue the monitoring and analysis of international fish trade and related developments in supply, demand, prices and consumption. Members noted the contribution of the small-scale sector to trade and encouraged FAO to make more explicit the impact of trade developments on this sector in its future work and reporting. (Para. 22)

The Sub-Committee also noted the challenges presented by changing and more stringent import requirements in important markets and that despite the large share of exports represented by developing countries, capacity-building and technical assistance continue to be needed by many exporting developing countries in order to implement such measures. (Para. 23)

Members highlighted the need for sustainable trade practices and encouraged FAO to continue its work in assisting Members in implementing the FAO Code of Conduct's Technical Guidelines on Responsible Fish Trade. (Para. 24)

The Sub-Committee requested FAO to carry out a number of studies. These include studies on the impact of regional trade agreements on the small-scale sector and rural communities including their social dimensions; regional trade developments; opportunities offered by geographical indications; developments in farming of whiteleg shrimp and related marketing issues; ornamental fish trade; fisheries services; financial instruments in fish trade including food commodity futures; and regional trade in low-value species. The Secretariat, while taking note of the requests, informed the Sub-Committee that due to the limited staff and financial resources, not all the studies could be undertaken in the next biennium. (Para. 25)

The Sub-Committee underlined FAO's comparative advantage in the analysis of fish trade. It welcomed FAO's strengthened relationship with organizations such as the OECD, the World Bank, the WTO and others and encouraged FAO to continue its efforts in disseminating more widely the results of its studies including the role of the fisheries sector in trade (including trade in services), consumption and towards improved food security, livelihoods, employment, especially women. (Para. 26)

Members underlined the growing role of aquaculture in production, trade and consumption and the need to evaluate the sector's dependence on fishmeal for its future growth. The Sub-Committee further noted the strong demand growth in many developing country markets and how this has provided opportunities for increased local aquaculture production with a subsequent growth in intra-regional trade. The Sub-Committee further noted that developing countries increasingly have become important markets also for developed country exporters. (Para. 27)

RESULTS OF THE EXPERT CONSULTATION TO DEVELOP AN FAO EVALUATION FRAMEWORK

Some Members recommended the adoption of the draft evaluation framework proposed by the Expert Consultation, noting that the evaluation framework could be subject to further revision once more experience had been gained in its implementation, while other Members felt that the draft evaluation framework was not ready for adoption and would benefit from a pilot program to test its applicability. (Para. 31)

The Sub-Committee agreed that, at this stage, it was not necessary to convene a further Expert Consultation or a Technical Consultation to progress work on the evaluation framework. (Para. 32)

Most Members appreciated the inclusion of inland fisheries in a common evaluation framework that addresses both the marine and inland fisheries, recognizing that the marine and inland guidelines share a large number of indicators. (Para. 33)

The Sub-Committee noted the recommendation made by the Expert Consultation that an amendment was required to the Guidelines in order to address the chain of custody requirements in full, but did not agree that this was necessary at this time. (Para. 34)

The Sub-Committee agreed that it would be useful to assess the effect of various ecolabelling schemes on fisheries management and economic returns. (Para. 35)

TRACEABILITY BEST PRACTICE GUIDELINES

The Sub-Committee, with the assistance of a group of Friends of the Chair, agreed to the following terms of reference for future work to be carried out in relation to the consideration and development of best practice guidelines for traceability:

Invite the FAO Secretariat to compile and analyze best practices and existing standards for a range of traceability purposes, including a gap analysis.

Identify options for future work including possible instruments.

The paper will explain the context of traceability more fully and will identify current systems and standards to avoid duplication for the future work.

The following principles for traceability schemes will provide the framework for the analysis:

- Not create unnecessary barriers to trade;
- Equivalence;
- Risk based;
- Reliable, simple, clear and transparent.

The paper would also review options for technical assistance to implement traceability schemes. (Para.38)

The Sub-Committee also agreed that the FAO Secretariat will develop this paper with the assistance of an expert consultant and submit it to the Fourteenth Session of the Sub-Committee on Fish Trade for further guidance. (Para. 39)

REVIEW OF MARKET ACCESS REQUIREMENTS

Members expressed support for FAO work in providing scientific support for Codex Alimentarius work. (Para. 41)

The Sub-Committee emphasized that FAO should provide technical assistance to small-scale fisheries and aquaculture in developing countries to improve their market access. (Para.42)

VALUE-CHAIN ANALYSIS AND INTERNATIONAL FISH TRADE

The Secretariat took note of the suggestions for inclusion of additional countries and regions in the value-chain project. (Para. 46)

The Sub-Committee noted the potential for the creation of cooperatives or similar collective structures to overcome fragmentation of small-scale operators. (Para. 48)

Members referred to the complexity of international value-chains and the importance of a more equitable distribution of benefits among value-chain stakeholders. Members also pointed out the usefulness of value-chain studies in analyzing how the value-chain could improve the conditions of small-scale operators. (Para. 49)

The Sub-Committee noted the challenges in acquiring adequate data on prices and costs along the value-chain and referred to a number of national and regional initiatives in improving collection and dissemination of appropriate data. (Para. 50)

UPDATE ON CITES RELATED ACTIVITIES

Members expressed support of the work FAO had undertaken with regard to commercially exploited aquatic species of interest to CITES and underlined the important role international fish trade has for the livelihoods and economies of many States. (Para. 51)

The majority of Members supported the current position of FAO regarding the interpretation of the CITES Appendix II criteria and encouraged the Secretariat to continue with its work in this regard. In particular, they stressed the need to examine stock status and the effects of international trade on it. (Para. 52)

The Sub-Committee expressed its continued support for the FAO Expert Advisory Panel and commented on the importance of robust scientific and objective advice on the stock status of aquatic species proposed for listing by CITES. Members requested the Panel, under its Terms of Reference, to strengthen its consideration of technical issues related to fisheries management and international trade which should also include the role of aquaculture for the species in question. However, different opinions were expressed on whether this would be best accomplished through a parallel process, or integrated into the existing evaluations by the Panel. (Para. 53)

Some Members supported continued work on a general Memorandum of Cooperation between FAO and CITES, while some other Members did not. However, the Sub-Committee emphasized that it should not, in any manner, undermine the current Memorandum of Understanding (MoU) between CITES and the FAO Fisheries and Aquaculture Department. (Para. 54)

Members underlined the importance of improving internal cooperation and consultations between national fisheries authorities and those responsible for CITES matters to ensure that pertinent information is being adequately presented to CITES parties as well as in fisheries management fora. (Para. 55)

Members welcomed the ongoing review of the implementation of the International Plan of Action for the Conservation and Management of Sharks undertaken by FAO which takes into account responses to the questionnaire developed by the Sharks Working Group of the CITES Animals Committee. Some Members also informed about the work undertaken by them in support of the International Plan of Action for the Conservation and Management of Sharks. (Para. 56)

The Sub-Committee emphasized that FAO work related to CITES be financed through Regular Programme Funds. While in principle this is recognized by the Council and by the FAO Fisheries and Aquaculture Department, CITES activities continue to depend on extra-budgetary funds due to the difficult current financial situation in FAO as well as the need to balance competing priorities. FAO has, until now, relied exclusively on the Japanese trust fund project for this purpose but it may, in the future, require extra-budgetary contributions from other Members of FAO. Without extra-budgetary funds, however, FAO will not be able to convene the Expert Advisory Panel scheduled for December 2012. The Sub-Committee encouraged FAO Members to contribute financial support to this process. (Para. 57)

The Secretariat took note of the need to consult with Members before communicating with CITES on issues not discussed by COFI or its subsidiary bodies. (Para. 58)

MONITORING IMPLEMENTATION OF ARTICLE 11 OF THE CODE OF CONDUCT FOR RESPONSIBLE FISHERIES (CCRF)

Members noted that the responses in the questionnaire indicated a low level of implementation by States on measures designed to reduce post-harvest losses and to evaluate and monitor the impacts of trade in fish and fisheries products on food security. Members also noted that the responses in the questionnaire indicated emerging concerns related to compliance with IUU regulations and traceability requirements. (Para. 60)

Members expressed concern with the low response rate to the questionnaire and cautioned that it was difficult to accurately assess the current level of implementation of the Code based on the limited feedback that was obtained. (Para. 61)

Members proposed a number of measures to be taken by FAO to ensure a higher response rate the next time the questionnaire is distributed. (Para. 62)

COFI SUB-COMMITTEE ON FISH TRADE AS INTERNATIONAL COMMODITY BODY FOR THE COMMON FUND FOR COMMODITIES

The Sub-Committee endorsed the three new projects submitted for consideration. (Para. 63)

Members suggested that project proposals with a regional focus could act as an instrument for integration within the region, when participating countries have common fisheries concerns. For example, Africa, Central America and the Pacific regions expressed interest in future regional projects. (Para. 64)

The roles of the various stakeholders - intergovernmental bodies, executing agencies and member countries - were explained by the Secretariat. In this regard, the need for better consultation among FAO, implementing partners and recipient members was underscored. Further, the need for adequate and relevant information and analysis of the proposed projects was also emphasized. A concept note will be prepared by the Secretariat for the next Session of the Sub-Committee clarifying these points. (Para. 65)

Members appreciated previous and ongoing CFC funded projects which benefit developing countries in promoting fish production, national and international marketing of fish products, fisheries cooperatives, incomes and quality of life. (Para. 66)

Members expressed appreciation for the gender focus of various CFC funded projects and proposed projects, especially along the value chain. It was suggested that future project proposals incorporate gender awareness campaigns, especially for small-scale fisheries. Members further suggested that future work incorporate decent working conditions in future project proposals. (Para. 67)

ANY OTHER MATTERS

The Sub-Committee took note of the invitation by Brazil as the host country for participation by members of the FAO Committee on Fisheries in the United Nations Conference on Sustainable Development (Rio+20), which will take place on 20–22 June 2012 in Rio de Janeiro, Brazil. (Para. 69)

DATE AND PLACE OF THE FOURTEENTH SESSION

The date and venue of the Fourteenth Session would be determined by the Director-General in consultation with the Chairperson and in light of the international calendar of meetings. (Para. 70)

