

KNOWLEDGE ASYMMETRIES ALONG THE SEAFOOD VALUE CHAIN, IMPACTS ON STAKEHOLDERS AND THE ROLE OF INFORMATION TECHNOLOGY

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MARKET ACCESS REQUIREMENTS

- Legislation and official controls
- Sanitary and phytosanitary requirements
- Sustainability, environment issues
- Price information, duties, taxes
- Non-tariff trade barriers
- Multitude of standards to be met:
 - National
 - Regional
 - Certifications
 - Private standards
 - Codex standards

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Joint FAO/WHO Food Standards Programme
CODEX ALIMENTARIUS COMMISSION

CODEX ALIMENTARIUS

**FOOD HYGIENE
BASIC TEXTS**

SECOND EDITION

CODE OF CONDUCT

FOR

RESPONSIBLE FISHERIES



ARTICLE 9 - AQUACULTURE DEVELOPMENT

9.1 Responsible development of aquaculture, including culture-based fisheries, in areas under national jurisdiction

9.1.1 States should establish, maintain and develop an appropriate legal and administrative framework which facilitates the development of responsible aquaculture.

9.1.2 States should promote responsible development and management of aquaculture, including an advance evaluation of the effects of aquaculture development on genetic diversity and ecosystem integrity, based on the best available scientific information.

9.1.3 States should produce and regularly update aquaculture development strategies and plans, as required, to ensure that aquaculture development is ecologically sustainable and to allow the rational use of resources shared by aquaculture and other activities.

9.1.4 States should ensure that the livelihoods of local communities, and their access to fishing grounds, are not negatively affected by aquaculture developments.

9.1.5 States should establish effective procedures specific to aquaculture to undertake appropriate environmental assessment and monitoring with the aim of minimizing adverse ecological changes and related economic and social consequences

ARTICLE 11 - POST-HARVEST PRACTICES AND TRADE

11.1 Responsible fish utilization

11.1.1 States should adopt appropriate measures to ensure the right of consumers to safe, wholesome and unadulterated fish and fishery products.

11.1.2 States should establish and maintain effective national safety and quality assurance systems to protect consumer health and prevent commercial fraud.

11.1.3 States should set minimum standards for safety and quality assurance and make sure that these standards are effectively applied throughout the industry. They should promote the implementation of quality standards agreed within the context of the FAO/WHO Codex Alimentarius Commission and other relevant organizations or arrangements.

11.1.4 States should cooperate to achieve harmonization, or mutual recognition, or both, of national sanitary measures and certification programmes as appropriate and explore possibilities for the establishment of mutually recognized control and certification agencies.

11.1.5 States should give due consideration to the economic and social role of the post-harvest fisheries sector when formulating national policies for the sustainable development and utilization of fishery resources.

11.1.6 States and relevant organizations should sponsor research in fish technology and quality assurance and support projects to improve post-harvest handling of fish, taking into account the economic, social, environmental and nutritional impact of such projects.

11.1.7 States, noting the existence of different production methods, should through cooperation and by facilitating the development and transfer of appropriate technologies, ensure that processing, transporting and storage methods are environmentally sound.



Food
and
Agriculture
Organization
of
the
United
Nations



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RESPONSIBLE
FISHERIES

7



**RESPONSIBLE
FISH UTILIZATION**



World review

Selected issues

Highlights of special studies

Outlook



WORLD REVIEW

Global fisheries and aquaculture production

- 144 million tonnes in 2006
- capture : 92 million tonnes
 - ◆ marine: 82 million
 - ◆ inland : 10 million
- aquaculture : 52 million tonnes





WORLD REVIEW

Inland fisheries

- 10 million tonnes in 2006
- precautionary approach vital
- catch statistics poor
- resources vulnerable to climate change and habitat degradation





WORLD REVIEW

Aquaculture

- annual growth rate 8.7%
- 51.7 million tonnes 2006
- value US\$78.8 billion
- China produces 67%





WORLD REVIEW

Fishers & fish farmers

- major growth in employment
- estimated 44 million in 2006 (12.5 million in China)
- mostly small-scale and artisanal
- 8% world's population depend on fisheries





WORLD REVIEW

Fishing fleets

- total number powered fishing vessels 2.1 million
- 70% in Asia
- 90% less than 12m long





WORLD REVIEW

Fish trade

- world trade worth US\$ 85.9 billion in 2006
- 37% all fish production exported
- net exports of developing countries up 4 times since 1986
- China biggest exporter since 2002

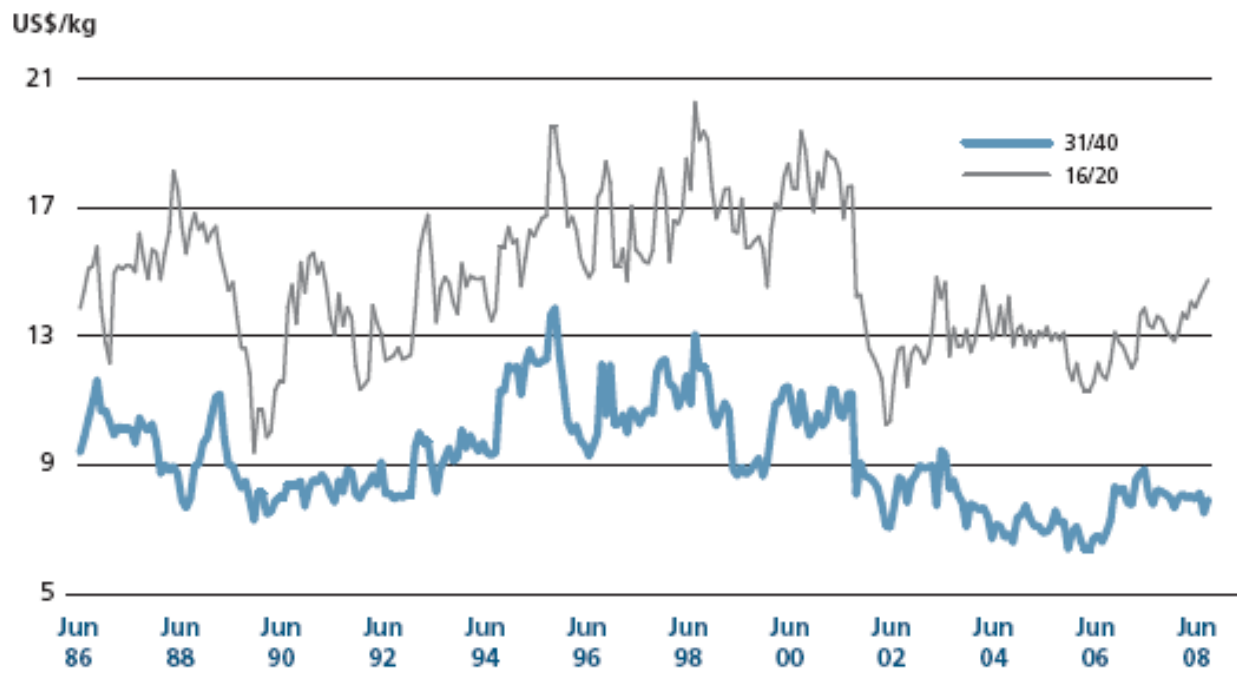


Trade flows by continent (total imports in US\$ millions, c.i.f.; averages for 2004–06)

Europe



Shrimp prices in Japan





WORLD REVIEW

Governance

Marine fisheries

- key issue is reducing fishing capacity

RFMOs

- must be more effective

IUU fishing

- efforts to prevent and deter needed





WORLD REVIEW

Governance

Deep-sea high seas fisheries

- international guidelines adopted by FAO

Highly migratory species and straddling stocks

- growing participation in UN Fish Stocks Agreement

Bycatch and discards

- managing bycatch species and reducing discards requires international attention



WORLD REVIEW

Governance

Aquaculture legislative framework

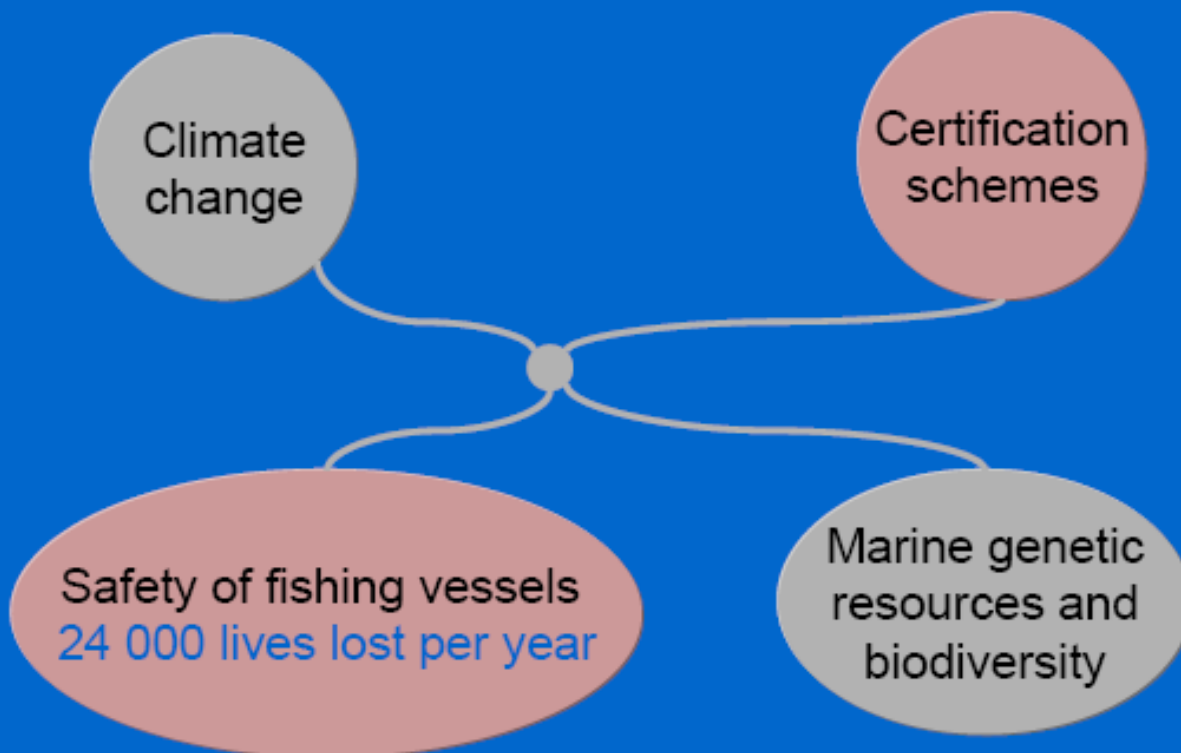
- codes of practice
- environmental risk assessment & monitoring
- health management

Trade and fisheries subsidies

- progress in WTO negotiations



SELECTED ISSUES



Private and public standards and certification schemes: synergy or competition?

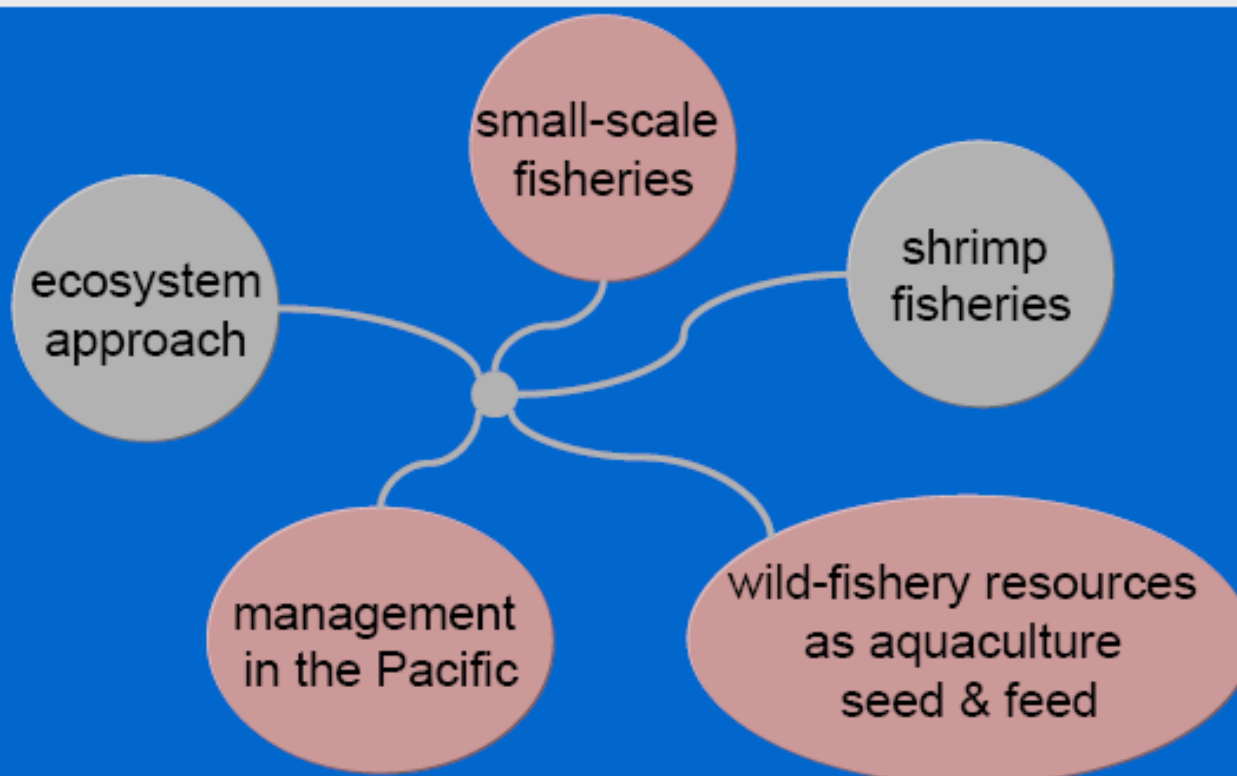
THE ISSUE

The context

Fish and fishery products are the most internationally traded food commodity. In recent decades, more than one-third of total annual production (live weight equivalent) has entered international trade. About half of this trade (as measured in value) originates in developing countries, whereas more than 72 percent is destined for three main markets: the European Union (EU), Japan and the United States of America. These three markets dominate fish trade in terms of both prices and market access requirements.



HIGHLIGHTS OF SPECIAL STUDIES





OUTLOOK

Projections & developments: 2010 and beyond

- total world production on target
- marine capture fisheries steady
- inland fisheries landings increasing
- aquaculture production growing
- fish for non-food purposes is not decreasing

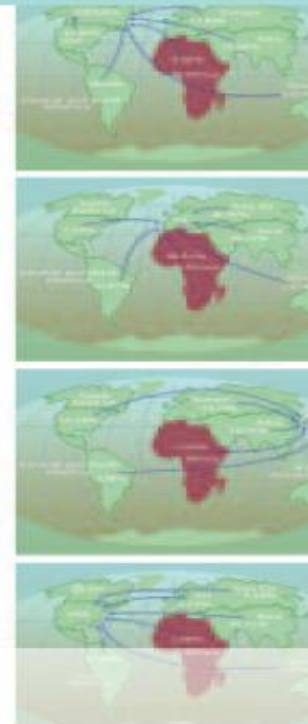


OUTLOOK

Aquaculture – constraints on future growth

- growth not uniform
- sector still growing – but at a lower rate
- aquaculture-enabling policies
- omnivorous species provide potential

Causes of detentions and rejections in international fish trade



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International Trade Centre

UNCTAD/WTO

Export Quality
Bulletin No. 84
April 2008

Exporting Seafood to the EU

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Some Basics

The Health Certificate

Other Requirements

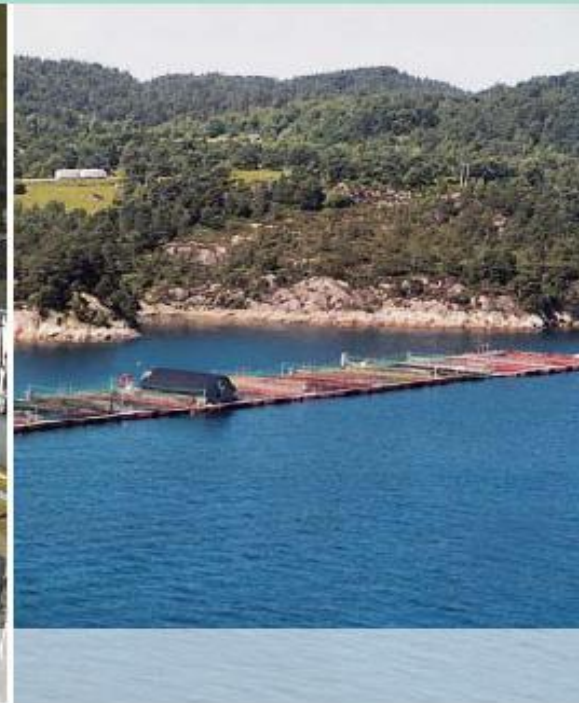
EU Regulations

Annexes

Assessment and management of seafood safety and quality



Application of risk assessment in the fish industry



A world map with a dark blue background and light grey landmasses. Seven project locations are marked with colored dots and labeled with their names and cities. The labels are: EUROFISH (Copenhagen), GLOBEFISH (Rome), INFOYU (Beijing), INFOSAMAK (Casablanca), INFOPECHE (Abidjan), INFOFISH (Kuala Lumpur), and INFOSA (Windhoek). In the bottom right corner, there is a white box containing the text 'Detailed Descriptions' above the word 'Projects' in a large, bold, white font. Below this box are two smaller white boxes: 'Search by topic' and 'Search by country'.

EUROFISH
Copenhagen

GLOBEFISH
Rome

INFOYU
Beijing

INFOSAMAK
Casablanca

INFOPECHE
Abidjan

INFOFISH
Kuala Lumpur

INFOSA
Windhoek

INFOPESCA
Montevideo

Detailed Descriptions
Projects

Search by topic

Search by country

OUTPUTS FROM FISHINFO NETWORK

- Market reports
- Commodity updates
- Web-based reports of market analysis
- FISHINSPECTOR

Responsible use of antibiotics in aquaculture



OTHER FAO PROJECTS IN THE REGION OF INTEREST TO SEAT

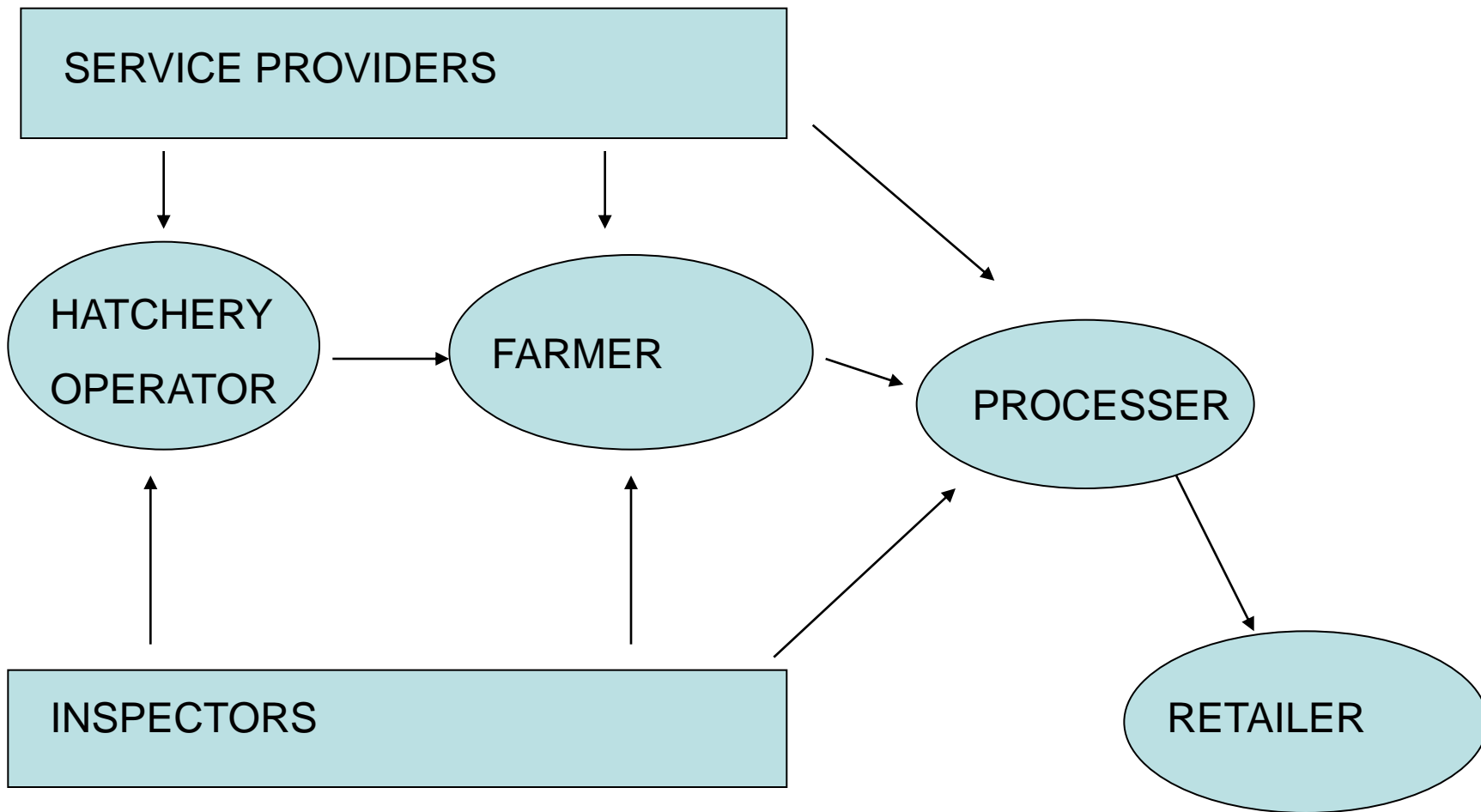
- TCP in Bangladesh on improved shrimp hatchery practices
- EU Funded project in Bangladesh on improving food safety
- TCP in Hubei Province and Hunan province of China
- Regional Fisheries livelihood Project (Vietnam among SEAT partners)

INFORMATION DISSEMINATION ACTIVITIES

- Regional Workshops addressing Market access requirements
- Co-sponsoring biannual World Seafood Congress (Morocco, 2009)- participation from Vietnam, China, Bangladesh
- Regional/International Conference Co-sponsoring

RECENT AND UPCOMING ACTIVITIES OF INTEREST TO SEAT

- Expert Workshop on Improving Biosecurity through prudent and responsible use of veterinary medicines (antimicrobials) in aquatic food production, Bangkok, Dec 15-18, 2009
- Expert Workshop on Application of Biosecurity for control of *Salmonella* contamination in sustainable aquaculture, Mangalore, Jan 19-21, 2010.



REVIEW OF EXISTING INFORMATION SYSTEM

- Suitability for different segments of value chain
- Accesibility, utility
- Critical points and channels of communication for standard end users

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THANK YOU