Fisheries trends and trade measures by 2035

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Objective
To provide a preliminary forward-looking perspective on how **fisheries** and key **trade-related measures** would look like by **2035** based on current **trends**

**Trends & Challenges**
- Population trends
- Climate change effects & challenges
- Harvesting vs. aquaculture
- Trade regimes & trade barriers

**We have for the first time a SDG exclusively dedicated to oceans**
Global Trends – Population

Today... world population is 7.4 billion

Additional **1.5 billion** people by **2035**

**Different age structure** of the global population (most people over 45 years old)

This will change **the demand**

Major **markets** will be in **emerging economies & developing countries**

Climate Change Effects

*Records* in high temperature on the sea-surface in many regions...

...Generate changes in the **marine environment**: Temperature, Water Stratification, Ocean Currents, Winds, Sea Level, pH Level, Precipitation, Rates of Changes
Since 1901 through 2014, sea surface temperatures rose at an average rate of \(0.13^\circ F\) per decade (NOAA, 2015)

With this pattern, we will probably go over a 1 degree variation in sea surface temperature by 2035
Climate change
Fish stocks

- 60% of the ocean biomass could be affected by disruptions

- Even with a full implementation of the Paris Agreement, we could only start curbing emissions by 2030-2035

- Accumulation effect

- Impacts may still be felt well over 2035 and could be irreversible in many cases
Current level of wild catch = 90 million tons. If we apply good fish management policies we may expand to 93-94 million tons by 2035 (WB, FAO, IFPRI and AES).

We have reached the limit and recovery is too slow.

Need to reassess stocks soon to have a solid baseline to measure advancement of SDGs 14.
Raise of Aquaculture

- The **gap in the supply** of fish will be filled by aquaculture by 2030
- Importance and urgency of **global fish and sustainable aquaculture management**
- Aquaculture **business** will be located mainly in **developing countries** in Asia, Latin America, Africa & Middle East
Future generations will need:

- Production and availability of food
- High quality, healthier and perhaps less caloric foods: natural proteins, fats, vitamin, oils, etc.

This is likely to expand to emerging and developing countries within this decade, coinciding with growing income levels.

The world food-producing sector must secure food & nutrition for the growing population through increased sustainable production.
Trade regimes and trade barriers

- Doha Round stagnated and losing impulse. However, the multilateral trade system will have to deliver in certain areas regardless of the fate of the Round (SDG targets: 14.6 and 14b)
- Regional Trade Agreements (RTAs) continue to increase (625 WTO notifications by Feb. 2016)
- New trend in RTAs towards the inclusion of conservation and sustainable use of marine resources and in the enforceability of the environmental chapters (i.e. the TPP)
- Developing countries are the main exporters with 56% of total world exports by 2014 (in value).
- Developing countries will be the main exporters and importers of fish and fish products by 2035

The role trade policies and rules needs to be a prominent issue in the First Triennial Oceans and Seas Oceans Conference in Fiji in 2017
**Tariffs in fish products**

*Source: UNCTAD (2016) Trade in Sustainable Fisheries.*

- **Tariffs** are coming *down* regardless of lack of advances in the Doha Round.

- **MFN and average applied tariffs** (wild capture and aquaculture) are *not particularly high* as compared to bound rates. This is the consequence of unilateral tariff reduction & accession commitments.

- MFN rates might be close to 4% and effectively applied rates might be close to 0% by 2035.

- RTAs will deeply contribute to cut these tariffs among participants.
Tariff peaks - Tariff escalation

- Some fish products in certain countries face tariff peaks and tariff escalation
- Most tariff peaks: high-income countries (usually linked to level of processing)

It’s in the interest of fish export and importing countries to reduce tariff and tariff peaks.

The WTO negotiations and the UNCTAD's Global System of Trade Preferences among developing countries could have a role since developing countries will play a higher role in both exports and imports.

Non Tariff Measures

- 80% of all NTMs are technical and phytosanitary measures

Source: UNCTAD (2016) Trade in Sustainable Fisheries based on WTO data.

- 1,250 fish related SPS/TBT measures, growing at 11.2% since 2010
- If the same growth rate continues, it could exceed 10,500 SPS and TBT measures by 2035
- And they are accumulating!
- NTMs could be important barriers for access to markets by small scale and artisanal fishermen (SDG 14.b)
- Urgent need to increase transparency, understanding, mechanisms harmonization, capacity building and mutual recognition
- There is a need for an NTMs mapping in the fish sector

SPS and TBT measures for fish and fish products (HS codes 03, 1604 and 1605) (2010-2015) - accumulated measures -

- SPS WTO-notified measures (initiated or in force)
- TBT WTO-notified measures (initiated or in force)
Conclusions

• Even if we improve sustainability on fishing activities, there might be significant impacts over fish migratory, reproduction trends and on the food chain due to climate change and other factors.

• We may have already reached the oceans' sustainability boundaries, unless global long-term resource conservation & effective management of resources becomes a top priority.

• Multilateral agreements have shaped the way in which we harvest, process and trade fish. RTAs are starting to set the new standards on key trade related aspects of marine resources.

• Need an NTMs mapping on the fish sector: with declining tariffs, NTMs continue to grow and will become a key determinant for market access and trade flows.

• These and other trends need to be considered in SDG 14 indicators and implementing activities.

• Trade needs to be a key issue in the 2017 Triennial Oceans and Seas Conference in Fiji.

• Need to explore the role of a UN task force/platform dedicated to trade related aspects of SDG 14 in Geneva.