



Oceans Economy and Trade Strategies (OETS)

Preliminary Sector Assessment for Costa Rica

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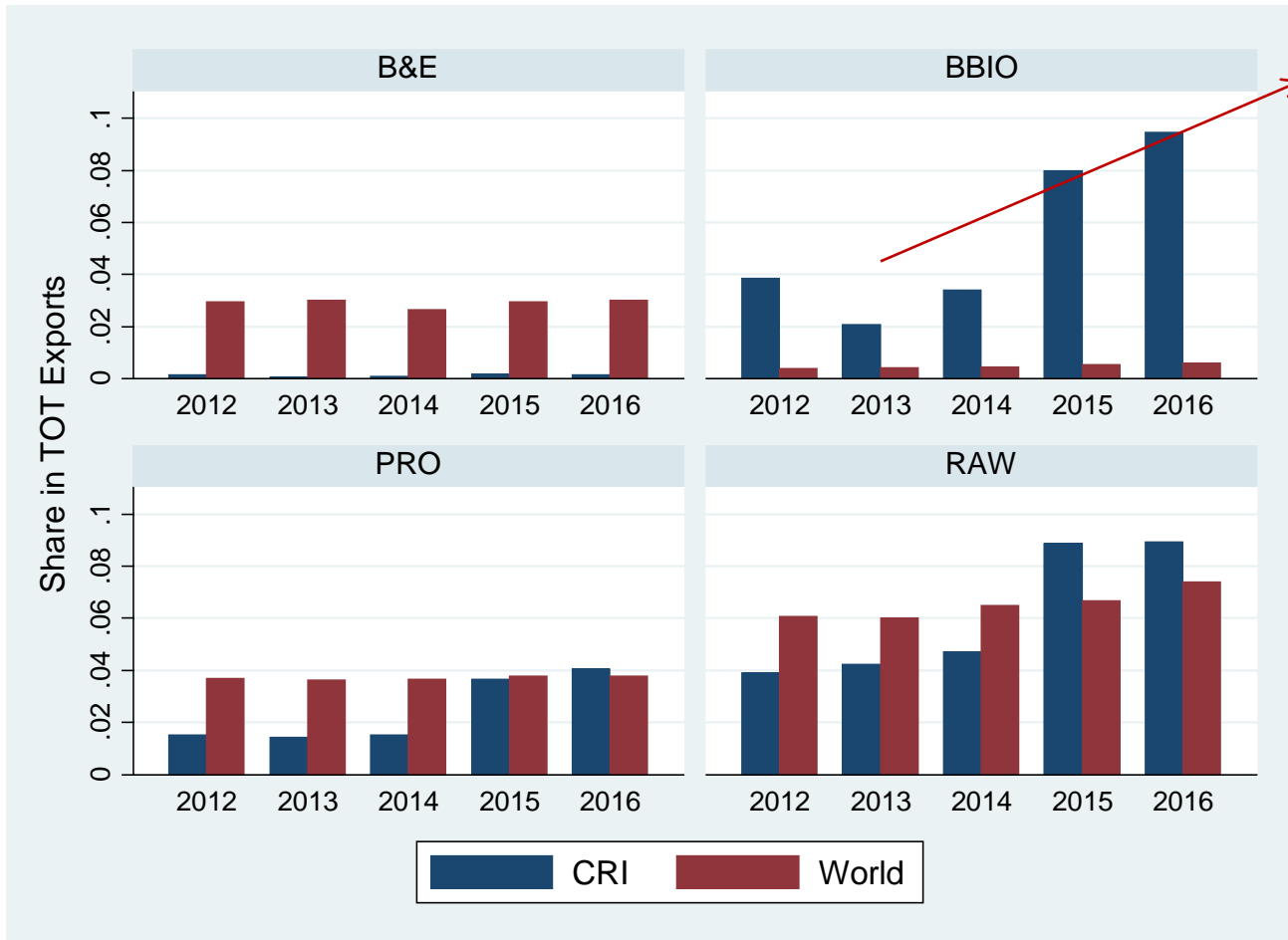
CONTENTS

1. Objectives
2. Costa Rica's oceans economy – goods
3. Costa Rica's oceans economy – services
4. Preliminary overview of selected oceans sectors
 1. Sector definition
 2. Global trends
 3. Country-specific trends
5. Discussion and way forward



2. Costa Rica's oceans economy - goods

Share in total exports

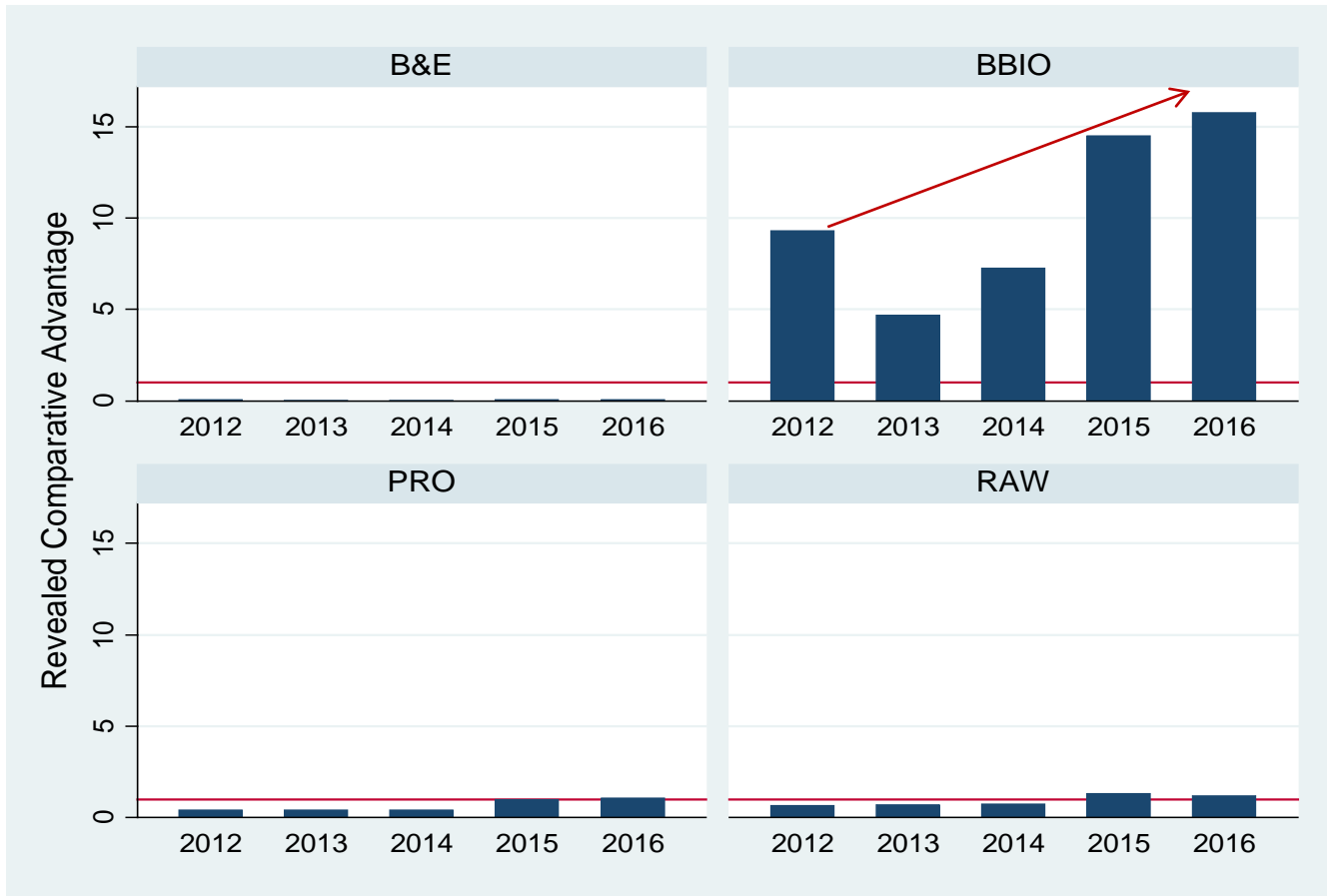


B&E: Boats and Engines
BBIO: Blue Bio
PRO: Processed Seafood
RAW: fish, crustaceans, molluscs



2. Costa Rica's oceans economy - goods

Revealed comparative advantage

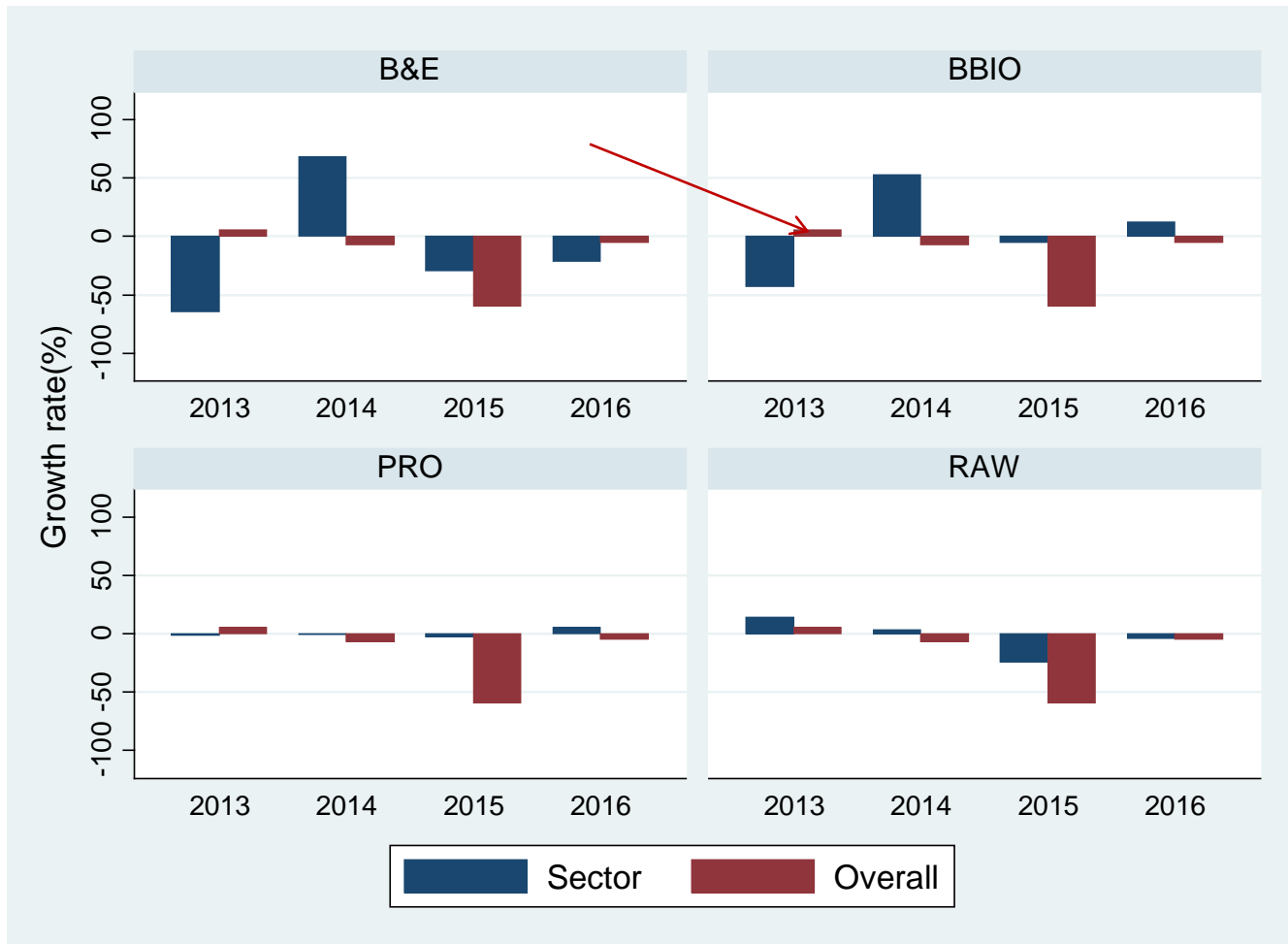


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2. Costa Rica's oceans economy - goods

Growth rates



B&E: Boats and Engines
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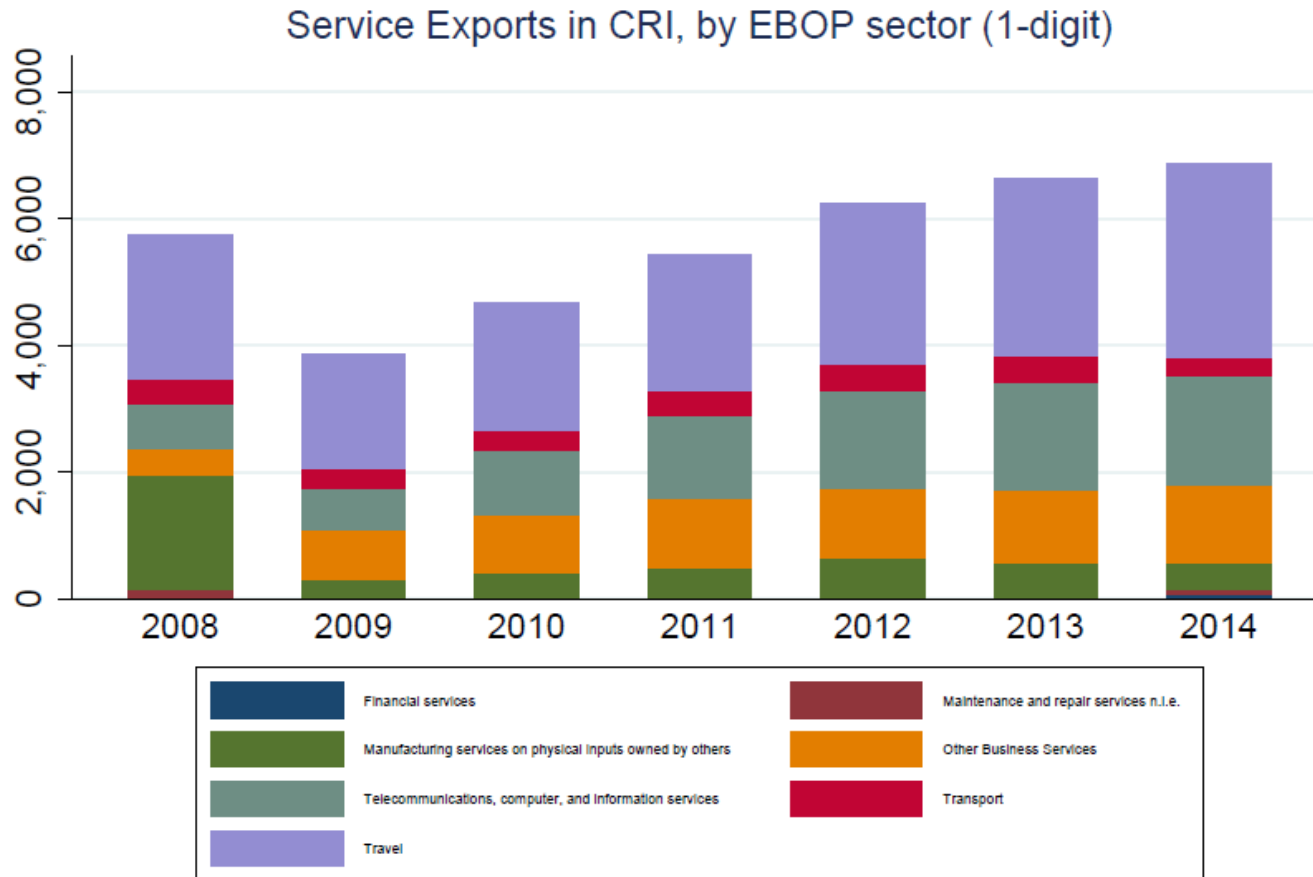
2. Costa Rica's oceans economy - production

	Ocean Area	Environment	Species	2012	2013	2014	2015
	Inland waters	Freshwater	Crustaceans	1	1	0.5	0.5
	Inland waters	Freshwater	Freshwater fishes	23355	26401	22650	18203
Aquaculture	Inland waters	Freshwater	Diadromous fishes	773	860	864	897
	Marine areas	Brackishwater	Crustaceans	3043	2890	2973	2682
	Marine areas	Brackishwater	Marine fishes	100	180	260	700
	Marine areas	Brackishwater	Molluscs	15	20	18	20
Capture	Inland waters	Freshwater fishes	Freshwater fishes	1000	1000	1000	1000
	Marine areas	Crustaceans	Crustaceans	1379	3296	2385	2385
	Marine areas	Marine fishes	Marine fishes	24257	15163	12305	12309
	Marine areas	Molluscs	Molluscs	56	49	6	6

Source: FAOStats



3. Costa Rica's oceans economy – services

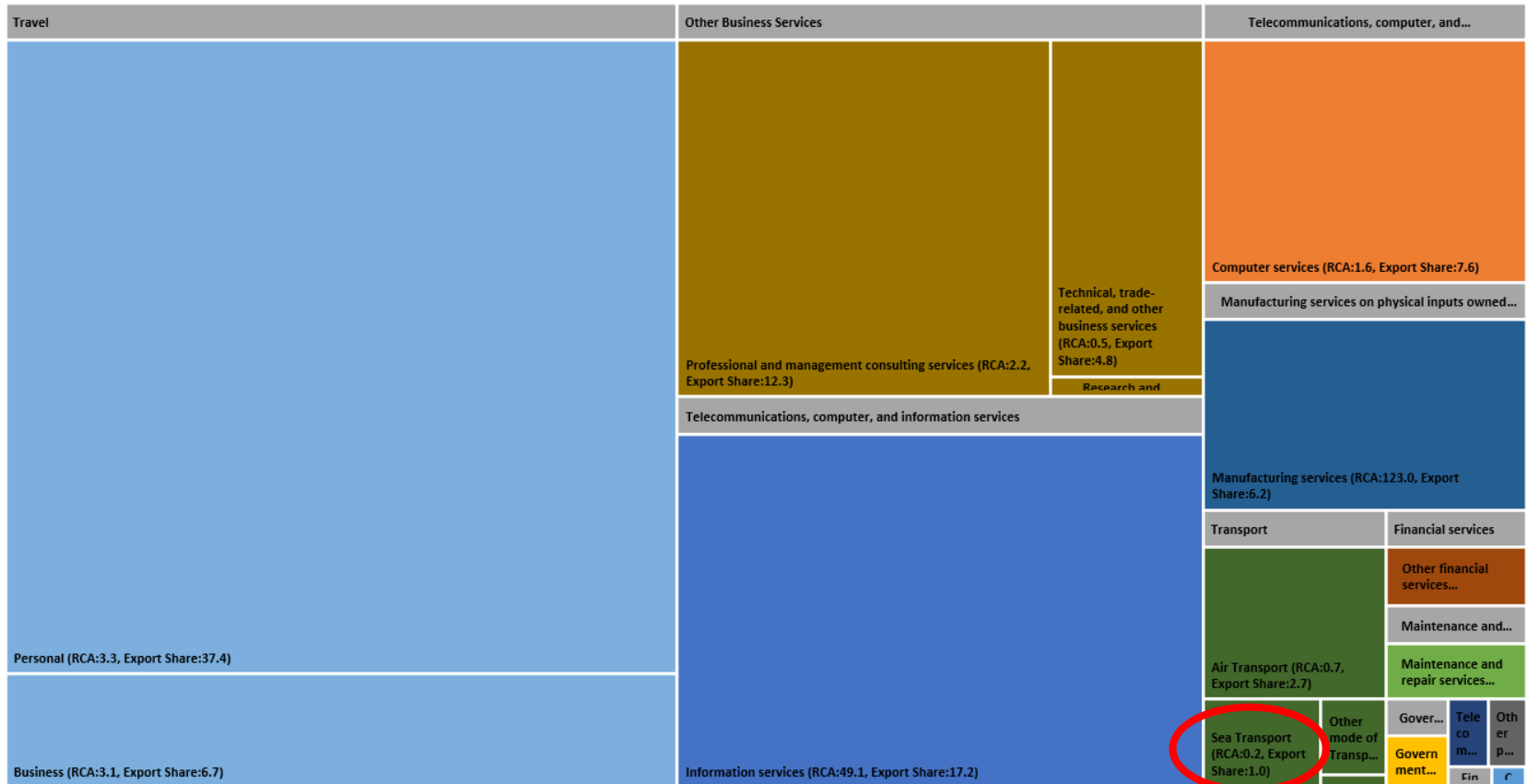


Note: Calculations based on IMF (2017): World Trade in Services: Evidence from a new database
Service exports in Million USD

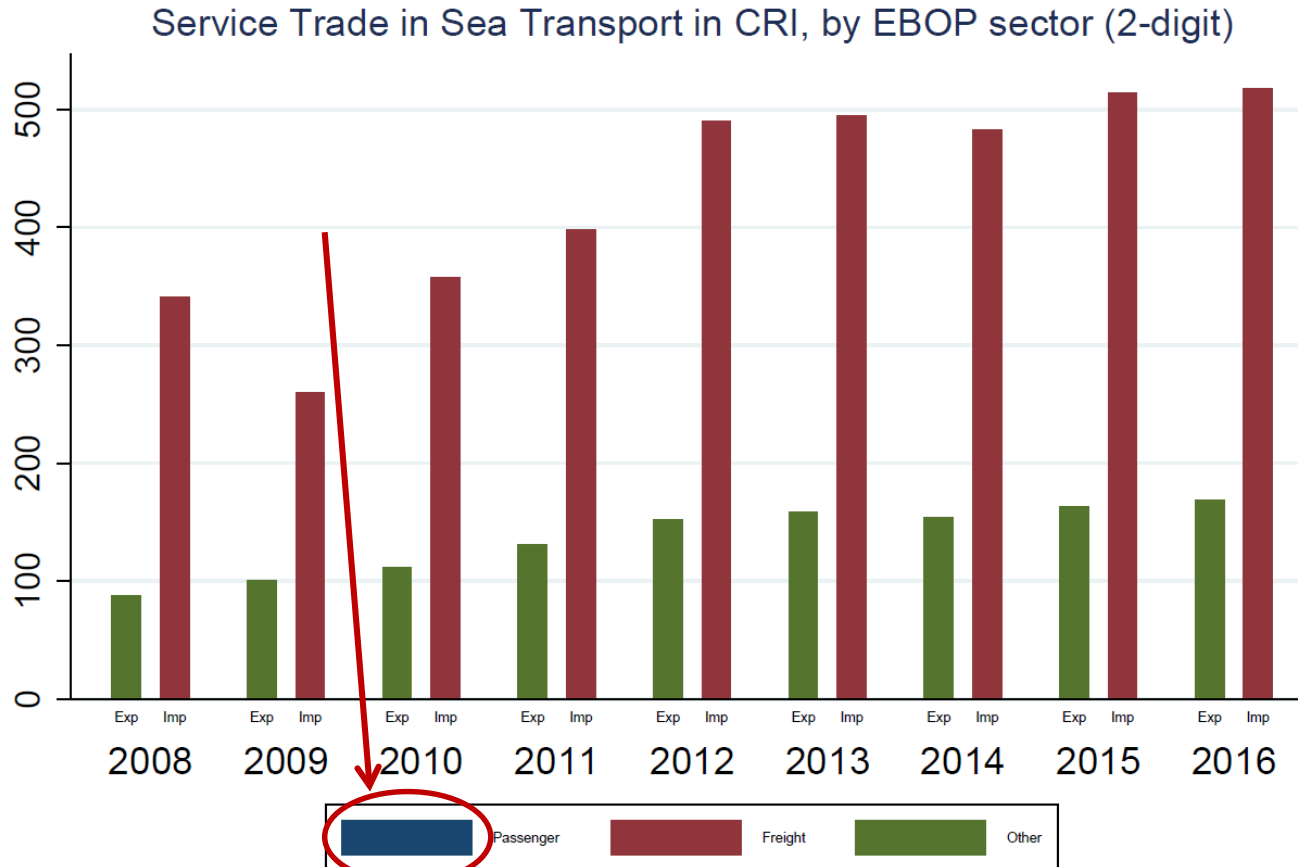


3. Costa Rica's oceans economy – services

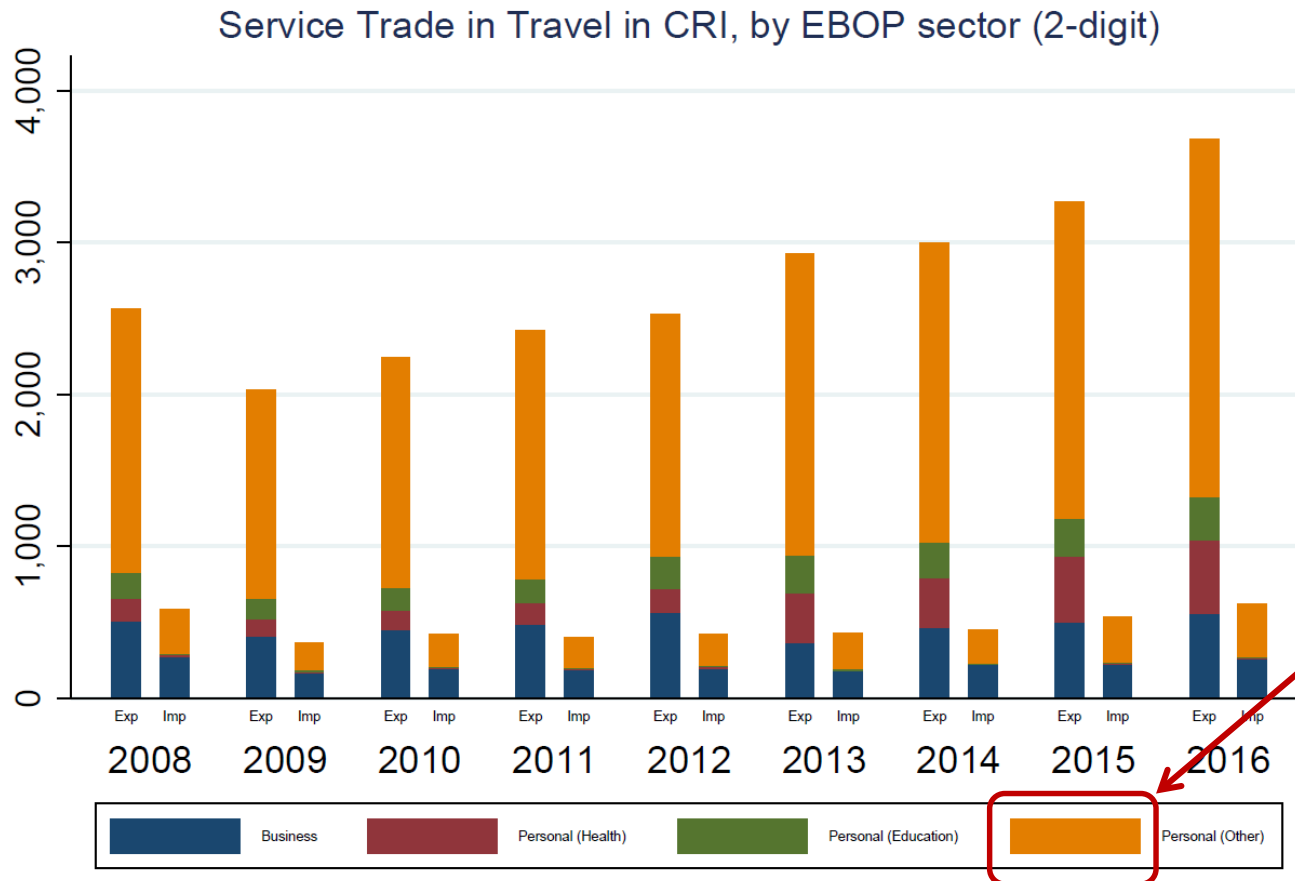
Service exports in CRI, by EBOP sector (2-digits) in 2014



3. Costa Rica's oceans economy – sea transport



3. Costa Rica's oceans economy – travel services



Note: Calculations based on UNCTAD Stats (2018)
Service exports in Million USD



4. Selected oceans sectors

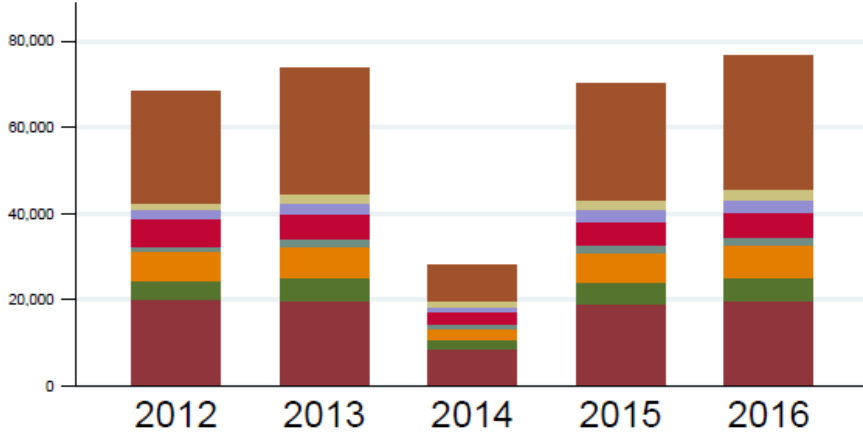
Sector definition

Sector	Products	Harmonized System (HS)	Standard Int'l Trade Classification (SITC)
1. All Fish (except tuna)	<ul style="list-style-type: none"> • Live fish • Fish, fresh or chilled • Fish, frozen • Fish, dried • Molluscs • Aquatic invertebrates 	0301 0302 0303 0304 0305 0307 0308	343 344 345 366 3501-3504
2. Tuna	<ul style="list-style-type: none"> • Atlantic and Pacific bluefin tunas • Southern Bluefin tunas • Longfinned tunas • Yellowfin tunas • Bigeye tunas 	30194 30195 30231-30236 30341-30487	341 342
3. Crustacean	<ul style="list-style-type: none"> • Lobster • Shrimps • Crabs • Prawns • Other: Meals and pellets of crustaceans 	0306	360
4. Seafood manufacturing	<ul style="list-style-type: none"> • Prepared fish • Prepared tuna • Prepared crustacean • Residues and waste from fish industries 	1603 1604 1605 230120	141 371 372 8142

Global Exports in 4 selected sectors

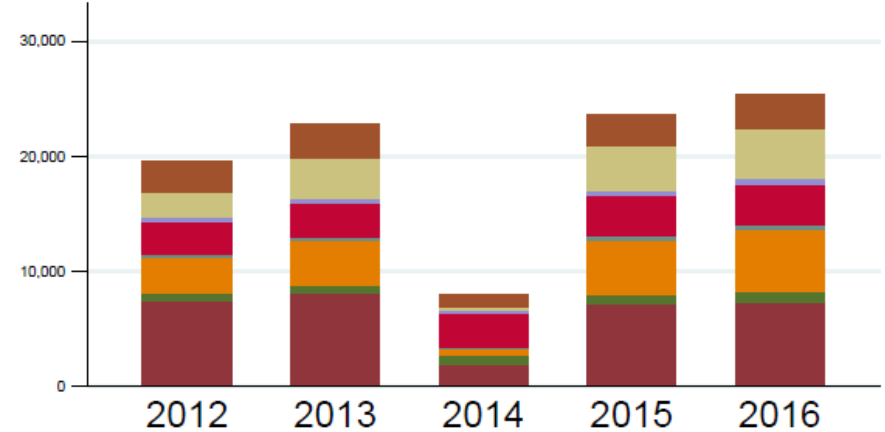
Fish

Costa Rica's global exports in Fish averaged 75.07000000000001 Mil. USD



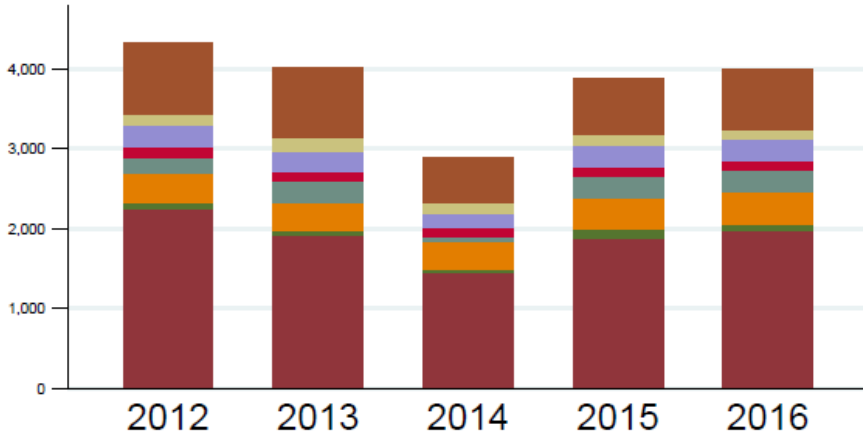
Crustaceans

Costa Rica's global exports in Crustaceans averaged 11.08 Mil. USD



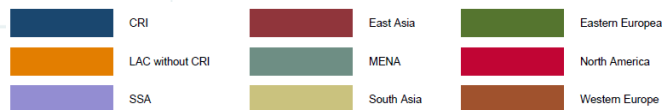
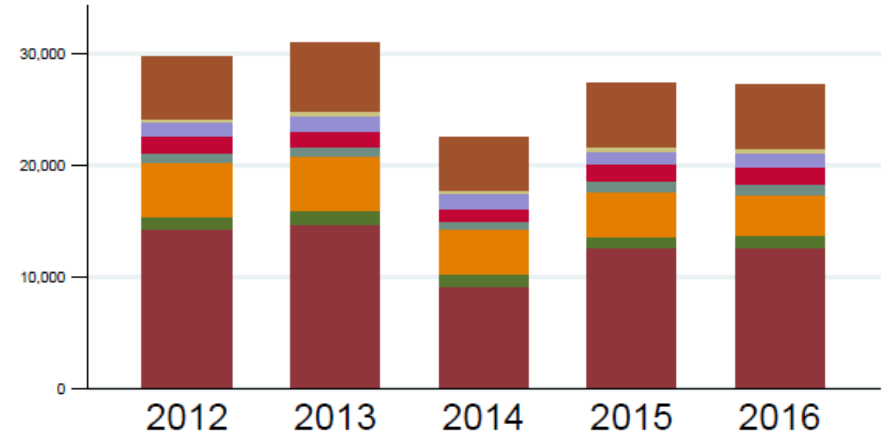
Tuna

Costa Rica's global exports in Tuna averaged 10.73 Mil. USD



Seafood Manufacturing

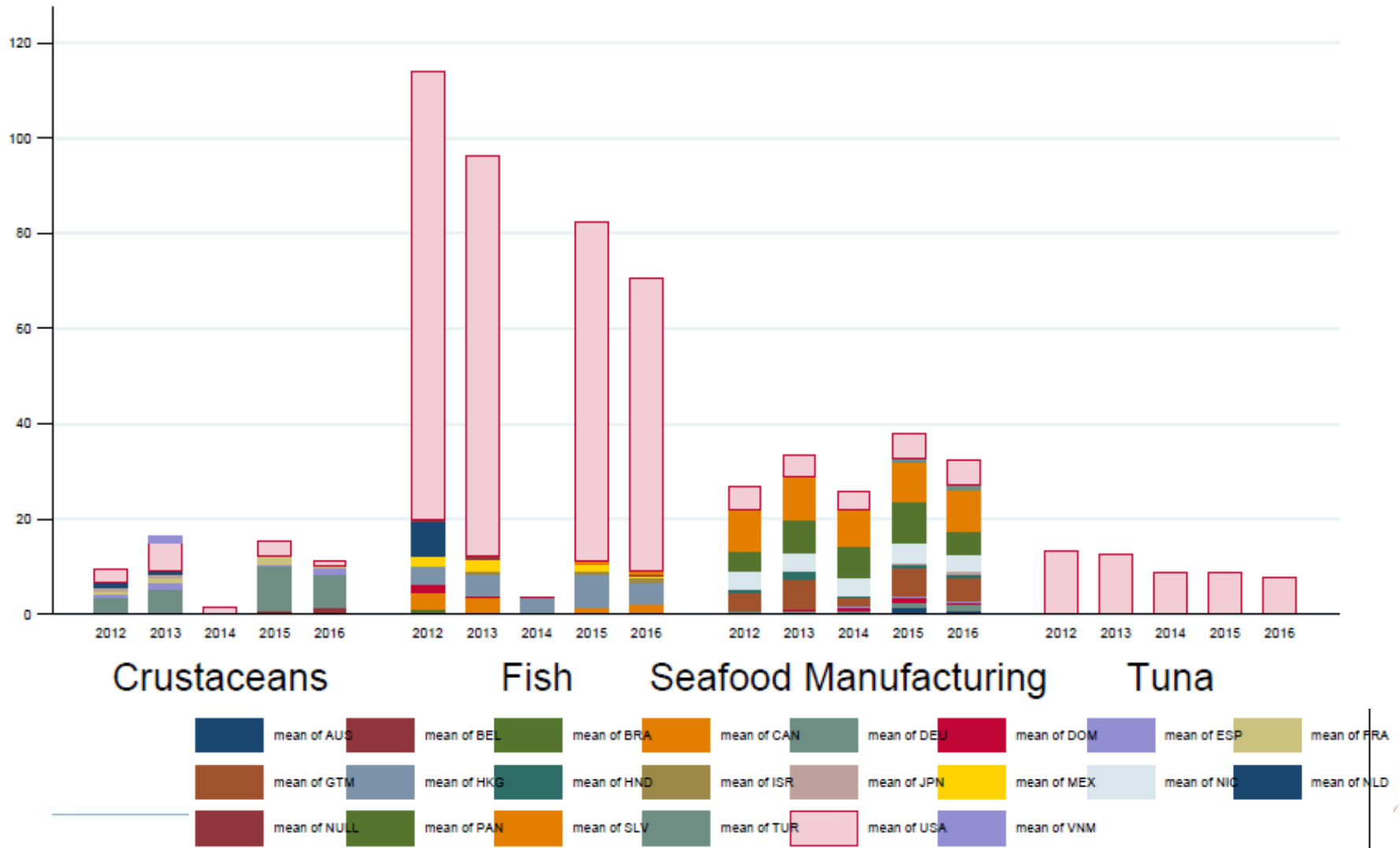
Costa Rica's global exports in Seafood Manufacturing averaged 32.2 Mil. USD



Note: Calculations based on UNCOMTRADE
Sectors as defined in appendix
Exports measured in Mil. USD at constant prices (2012)

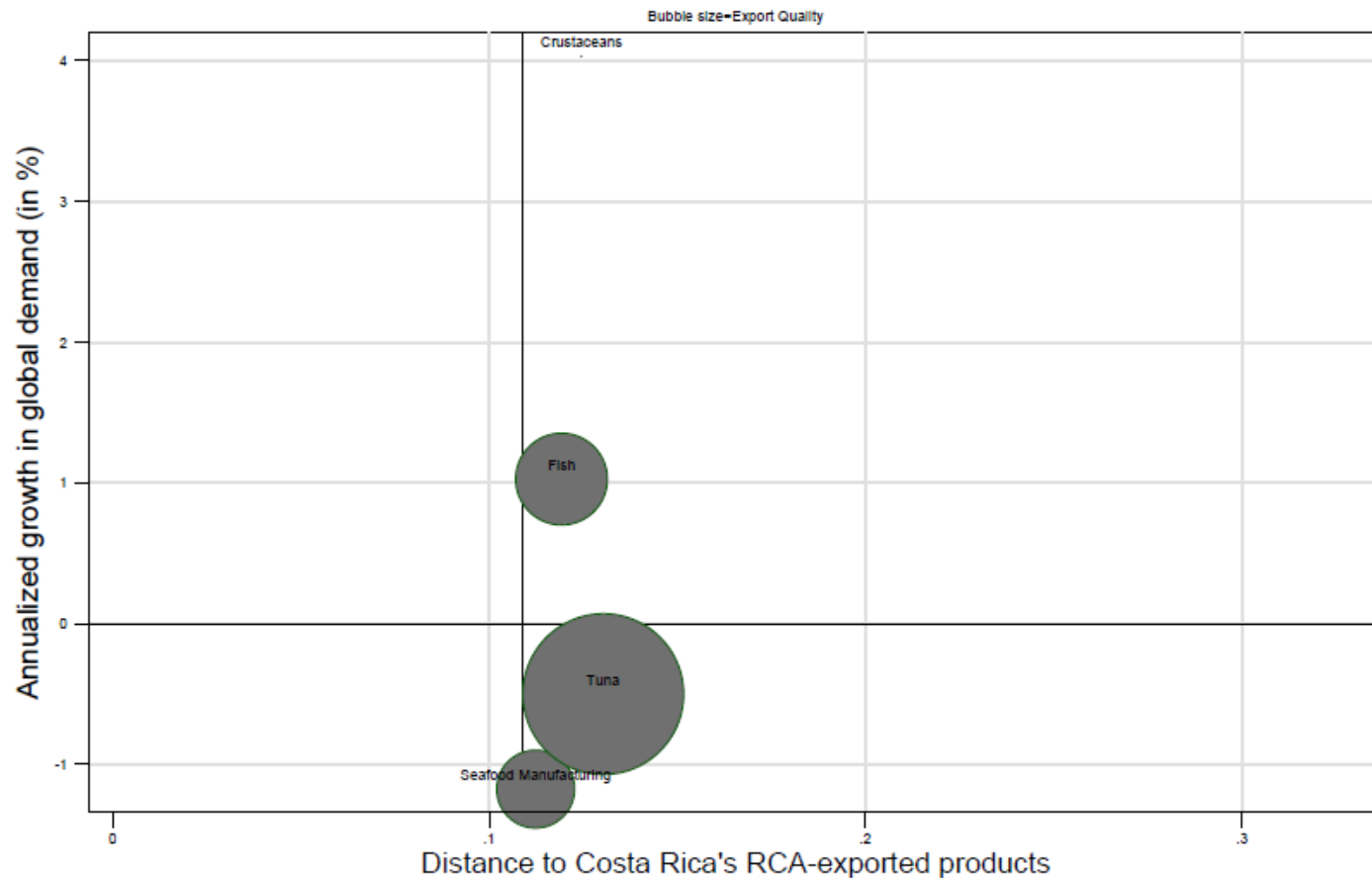
4. Selected oceans sectors: market structure

Costa Rica's export structure, by sector



4. Selected oceans sectors: demand and supply

Demand, Supply and Export Quality of Selected Oceans Sectors

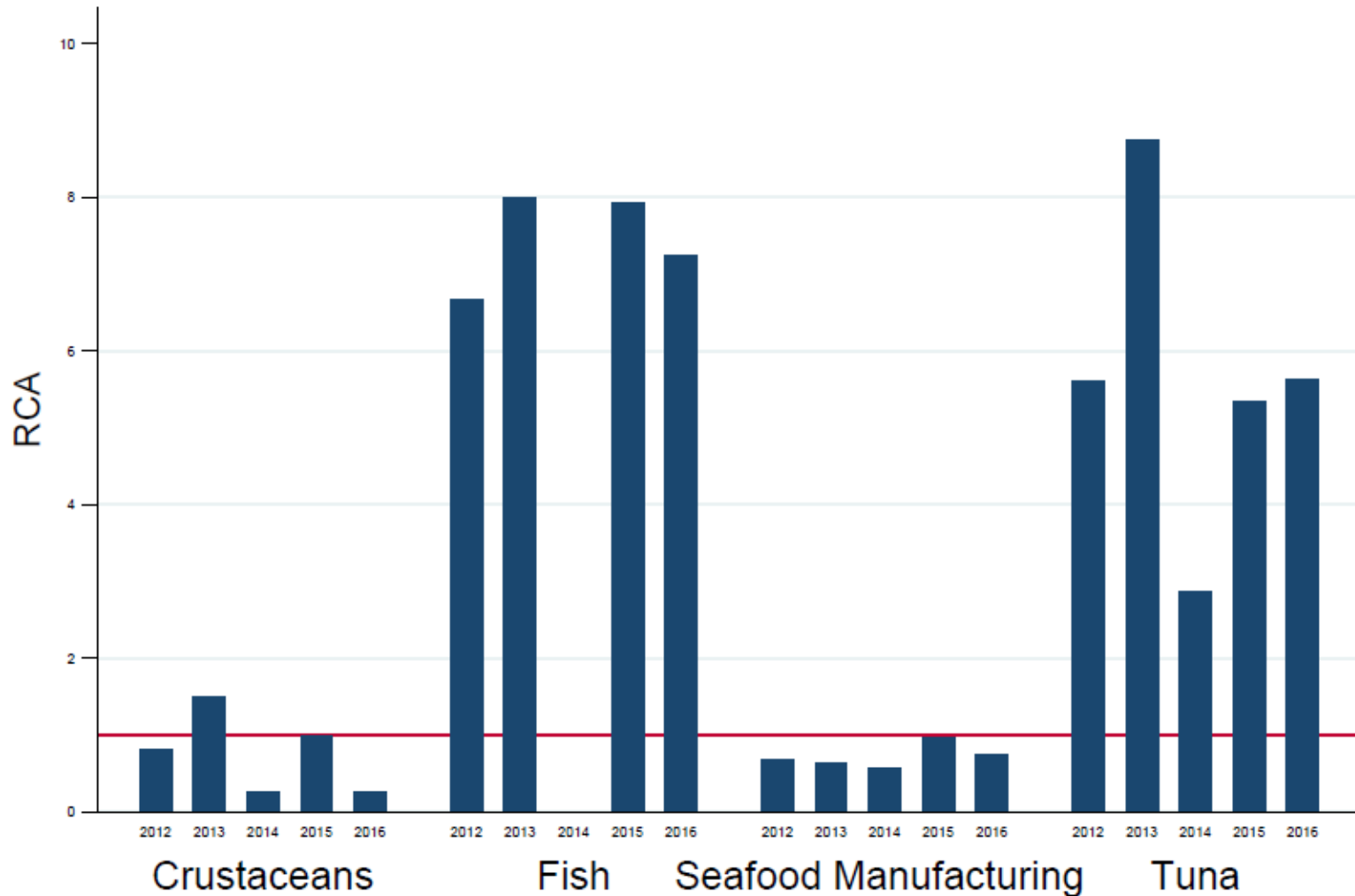


Data sources: BACI (based on UNCOMTRADE), Feenstra and Romalis (2014)
Methodology: Metrics are averaged over 2012-2016; Asymmetrical distance; unweighted sector aggregation

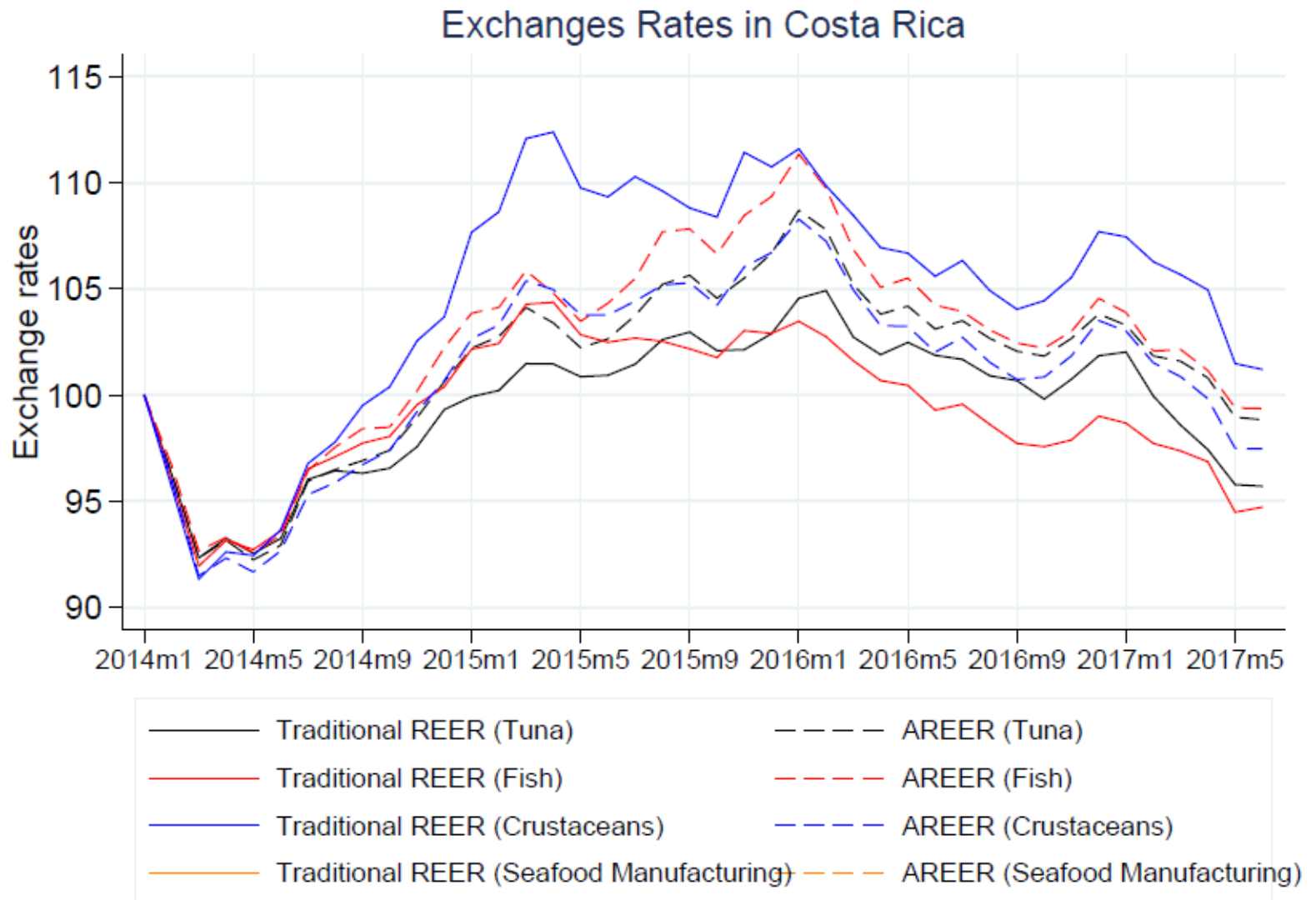


4. Selected oceans sectors: export competitiveness (trade)

Revealed Comparative Advantage, by Sector



4. Selected oceans sectors: export competitiveness (price)



5. Discussion and way forward

- Complementary data gathering, analysis and synthesis required:
 1. More disaggregated **trade analysis** (at HS 6-digits), with insights from customs statistics (firm-level trade flows)
 2. **Market access conditions** (tariffs and non-tariff measures)
 3. **Employment and earnings** (survey-based), disaggregated by gender and vulnerable populations (not leaving anyone beside)
 4. Private sector data on **production** and perceptions of **market imperfections** (survey-based)
- Analysis of the political economy
 1. Stakeholder mapping
 2. Level of compliance with mandatory and voluntary sustainability standards
 3. Focus on regions?



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