Seafood and other marine resources value chains

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The Seafood value chain

Inputs → Processing → Packaging → Wholesaling → Retailing → Consumption

Harvesting
- Catch
- Sort
- Grade
- Weigh

Pre-Landing & Landing
- Cold storage
- Freezing - Icing
- Distribution to manufacture

Cleaning / Pre-transformation
- De-heading
- Slime removal
- Cutting
- Meat-bone separation
- Use of discards

Processing
- Salt
- Smoke
- Dry
- Can
- Package
- Brand

Services & Marketing
- Transport
- Fishmongers
- Marketing
- Wholesalers
- Certifiers
- Retailers
- Restaurants
- Sales
### Key factors influencing fisheries value chains

<table>
<thead>
<tr>
<th>Environment</th>
<th>• Resources</th>
<th>Capacity</th>
<th>Catch Potential</th>
<th>Renewable &amp; Non-renewable</th>
<th>Sustainability</th>
<th>Yields (MSY or other reference points)</th>
<th>Impacts on ecosystems</th>
<th>Recycling</th>
</tr>
</thead>
<tbody>
<tr>
<td>People</td>
<td>• Food security</td>
<td>Jobs &amp; Employment</td>
<td>Fishers' rights</td>
<td>Communities</td>
<td>Companies (employees)</td>
<td>Wages</td>
<td>Skills</td>
<td>Cooperation</td>
</tr>
<tr>
<td>Policy and regulation</td>
<td>• Jurisdiction</td>
<td>Law of the sea</td>
<td>Trade agreements</td>
<td>Cooperation</td>
<td>Access &amp; tenure rights</td>
<td>Stocks management</td>
<td>Indigenous Knowledge</td>
<td>Hazard control &amp; quality</td>
</tr>
<tr>
<td>Markets</td>
<td>• Demand</td>
<td>Market Access</td>
<td>Exports-imports</td>
<td>Distribution chains</td>
<td>Consumer requirements</td>
<td>Growth potential</td>
<td>Niche markets</td>
<td></td>
</tr>
<tr>
<td>Infrastructure &amp; technology</td>
<td>• Harbours</td>
<td>Boats &amp; Vessels</td>
<td>Equipment</td>
<td>Warehouses</td>
<td>Machinery</td>
<td>Supporting infrastructure</td>
<td>Monitoring, control &amp; surveillance systems</td>
<td>Traceability</td>
</tr>
<tr>
<td>Services</td>
<td>• Fishing</td>
<td>Transport</td>
<td>Port</td>
<td>Storage</td>
<td>Price</td>
<td>Wholesale</td>
<td>Marketing</td>
<td>Retail</td>
</tr>
<tr>
<td>Finance/subsidies</td>
<td>• Funding</td>
<td>Investors</td>
<td>Incentives</td>
<td>Access to credit</td>
<td>Development finance</td>
<td>Profitability</td>
<td>Margins</td>
<td>Taxes &amp; Duties</td>
</tr>
</tbody>
</table>
Oceans Economy and Trade Strategies

### Barbados
- Tuna, billfish, flying fish
- Sea moss
- Fingers, sausages, sticks, etc
- Consulting and training

### Belize
- Tuna, lobster, groupers
- Shrimp
- Tails and other parts
- Wildlife tour operations, seafood, hotel & restaurants

### Costa Rica
- Tuna vs small pelagic
- Shrimp & snappers
- Canned foods

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<tr>
<th>Country</th>
<th>Marine capture</th>
<th>Aquaculture</th>
<th>Seafood manufacture</th>
<th>Coastal &amp; marine environmental services</th>
<th>Links with tourism services</th>
</tr>
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Toward a Joint plan of action on trade-related aspects of SDG 14

Key issues

- Trade in fisheries services & fisheries clusters
- Oceans/Blue economy strategies (e.g. sustainable fisheries, aquaculture management plans & value chain integration)
- Voluntary standards, Blue BioTrade, eco-labelling, traceability systems, catch documentation schemes
- Accelerate achievement of the trade-related targets of SDG 14
- State of fish stocks and aquaculture socio-economics
- Government measures (Subsidies/NTMs), fight against IUU fishing
- Needs of small-scale fisheries and aquaculture operators
Thank you