

Workshop of market access for SSF and the
Belt and Road Initiative

Market access: tariff and non-tariff measures faced by SSF in both northern and southern markets

28 November 2024

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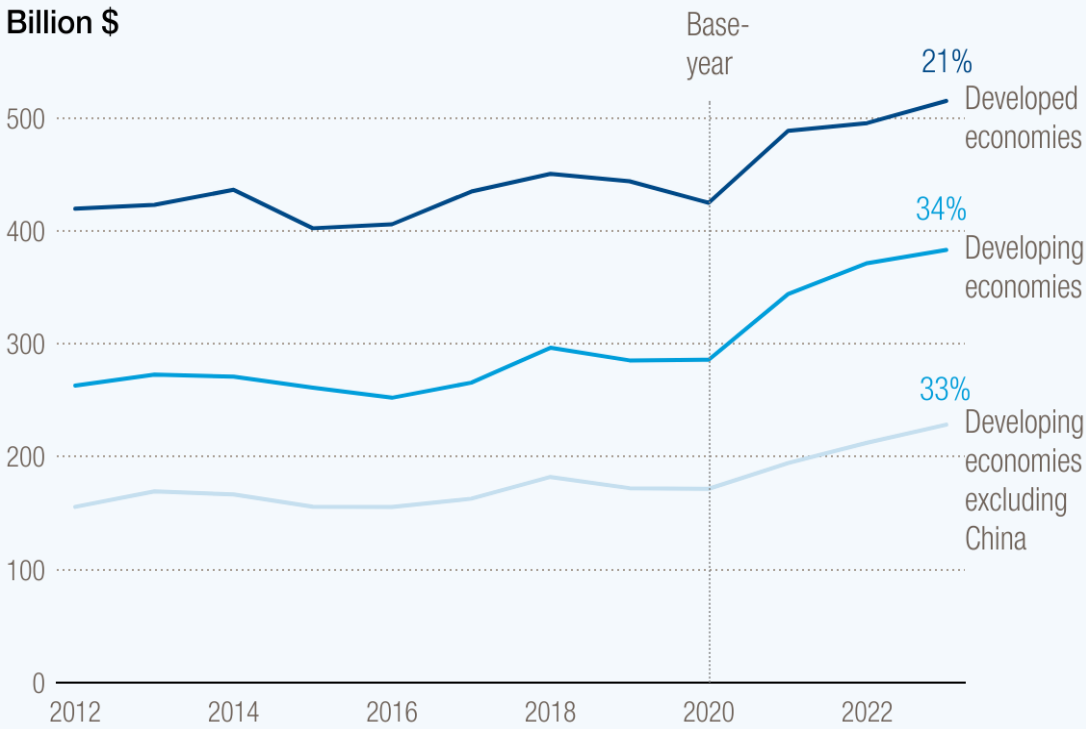
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Affairs Officer, TEDB, DITC



Total exports of marine fisheries (primary and processed is about \$200 billion in 2023, representing about 25% of all ocean goods exports)



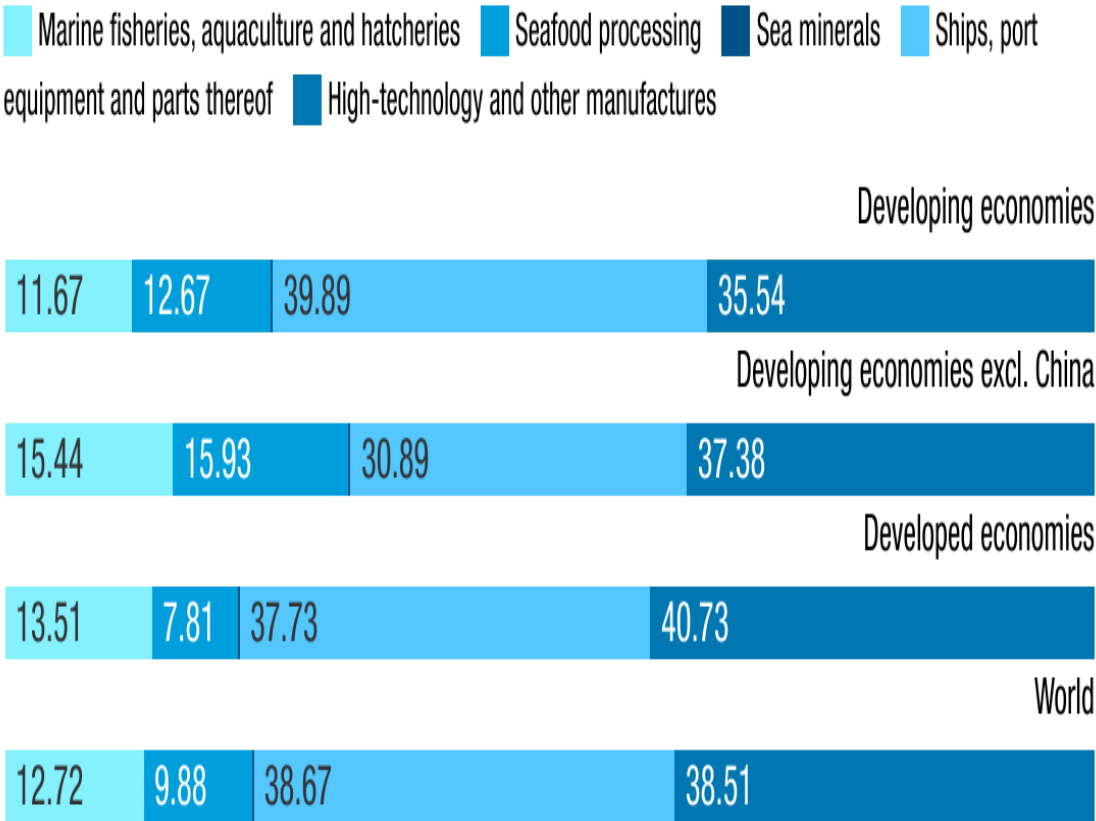
Exports of ocean-related goods grew by 26% between 2020 and 2023, reaching \$900 billion



Source: UNCTAD, 2024. Ocean Trade in Goods Database



77 per cent of ocean-related goods exports in 2023 were manufactures

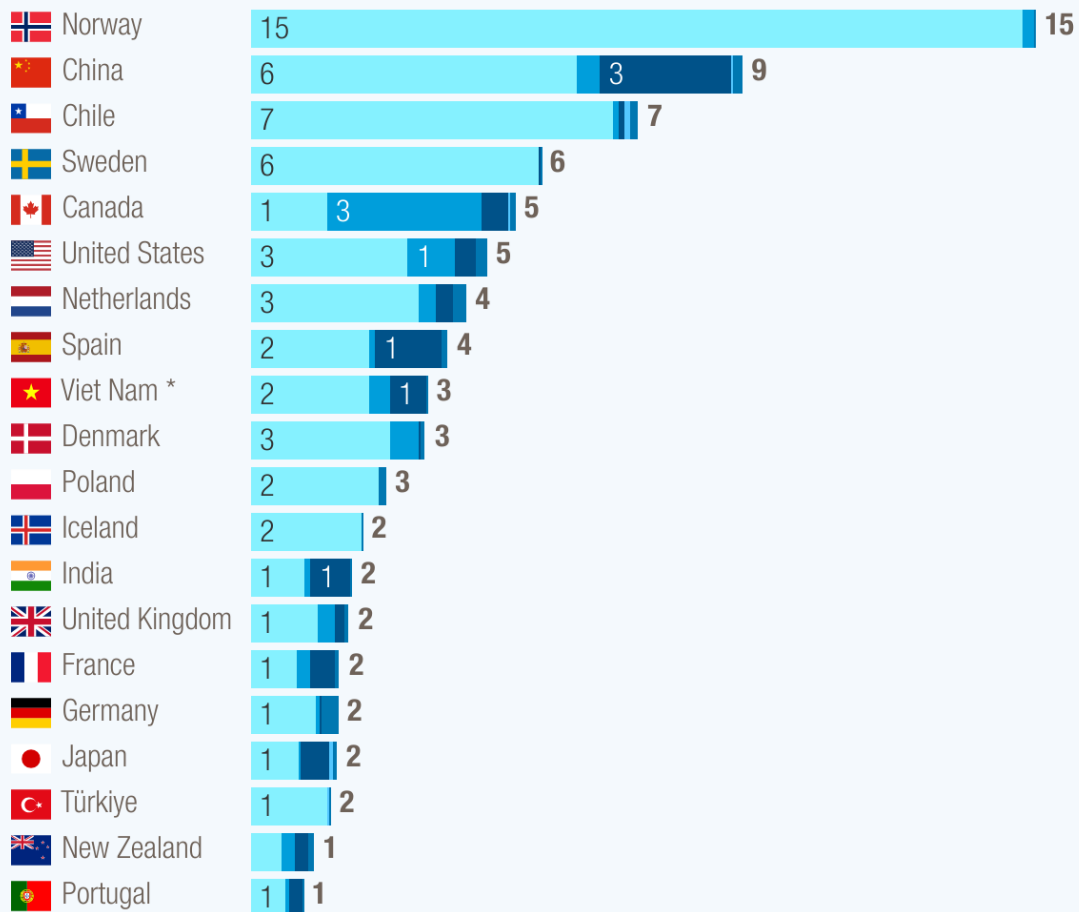




Top 20 exporters of marine fisheries, aquaculture and hatchery species in 2023

Billion \$

Finfish Crustaceans Molluscs Aquatic invertebrates other than crustaceans
Other living marine products



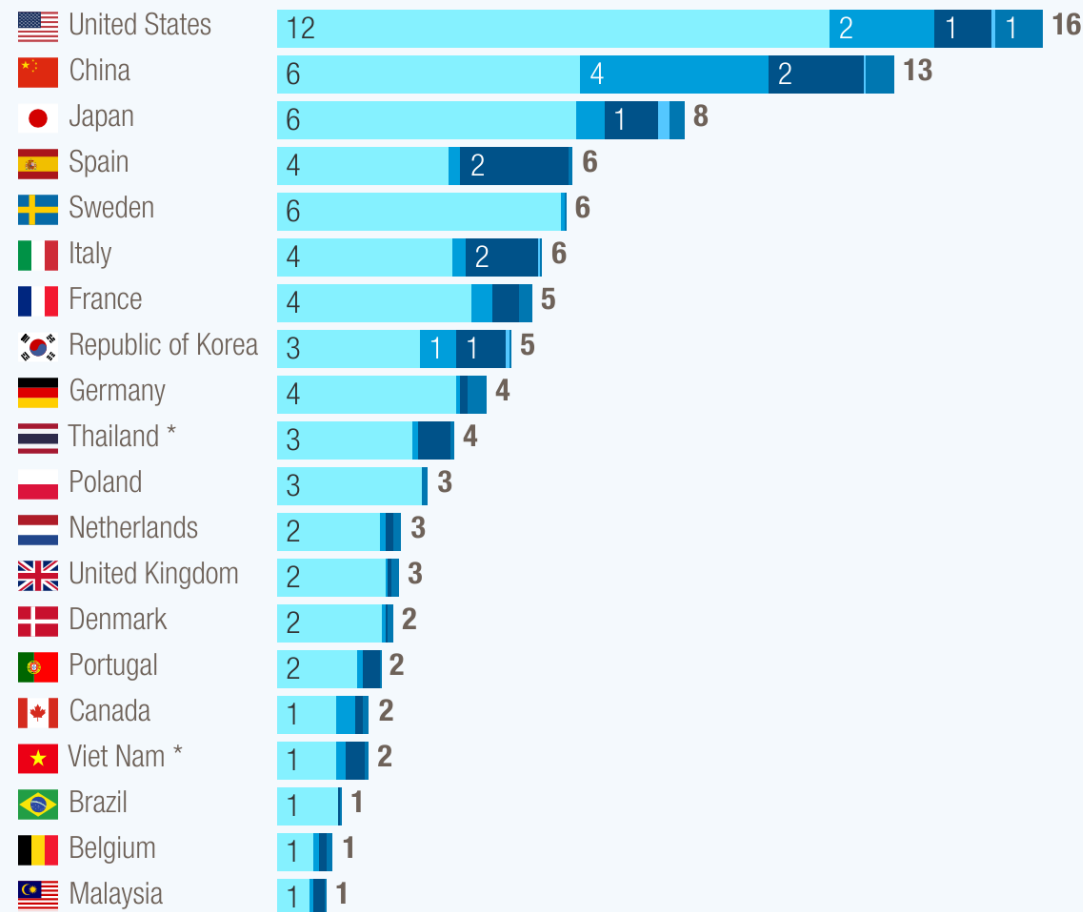
Source: UNCTAD. 2024. Ocean Trade in Goods Database
Note: *2022 data used for countries without 2023 figures.



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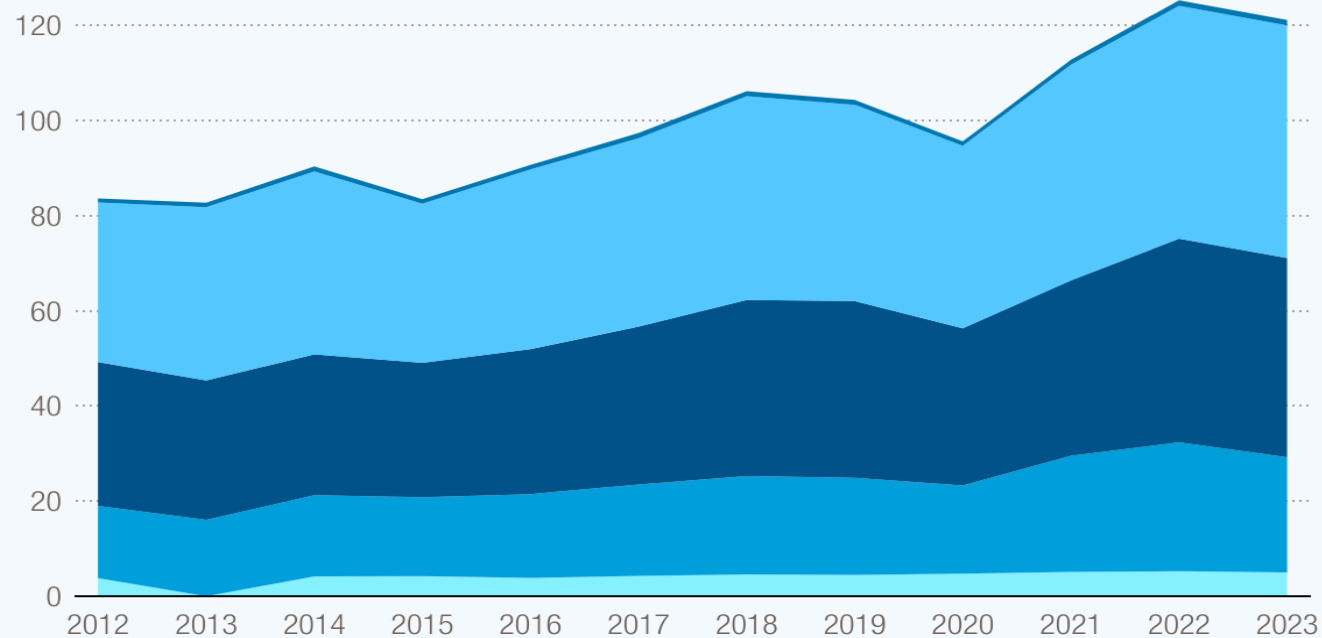


➤ Main import markets by value

➤ **Europe and Asia account for 40 and 30%, respectively, of imports of marine fisheries and aquaculture**

\$ Billions

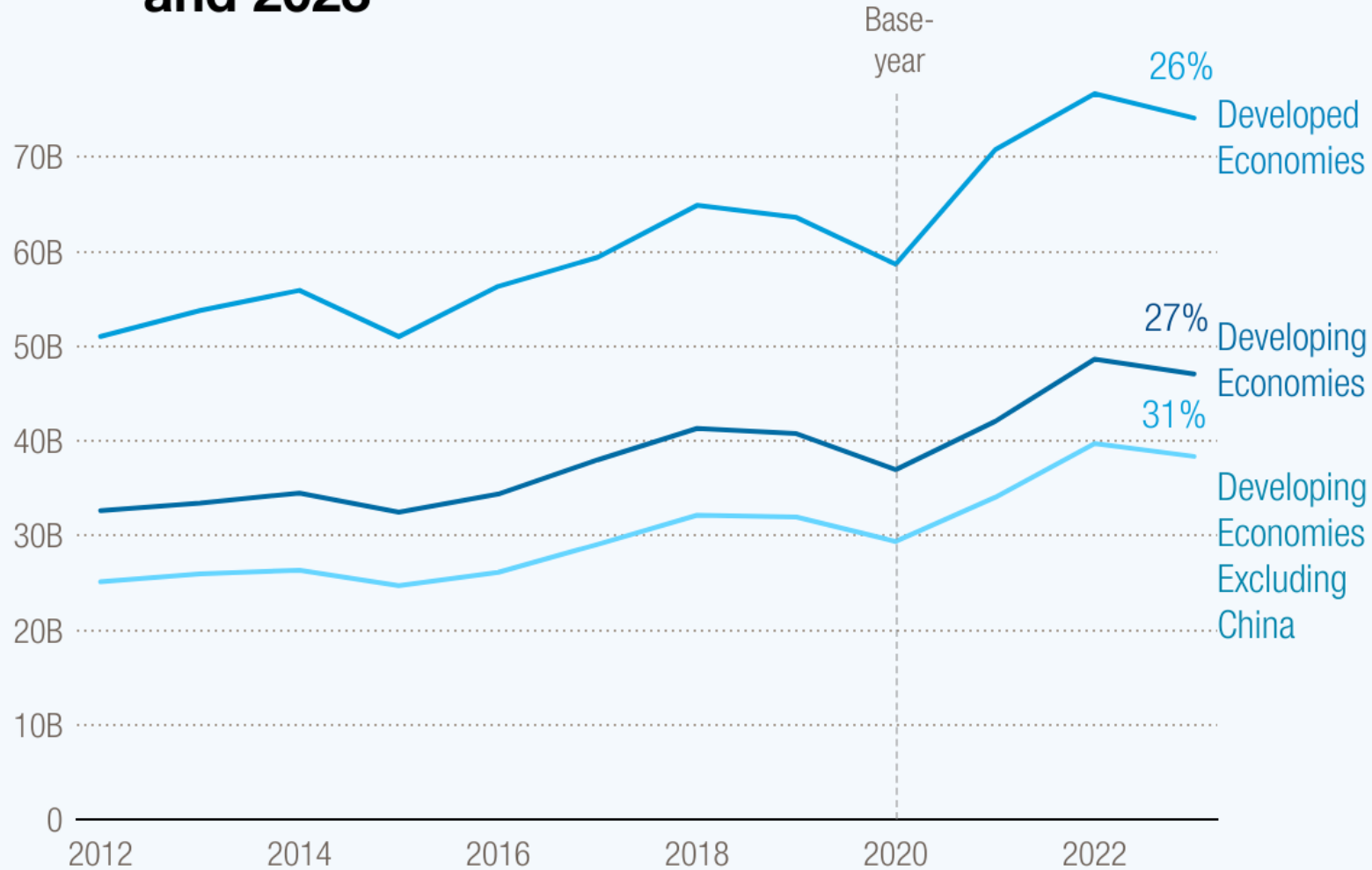
Africa Americas Asia Europe Oceania



Source: UNCTAD. 2024. Ocean trade in goods database



Imports of marine fisheries, aquaculture and hatchery species grew by 28% between 2020 and 2023



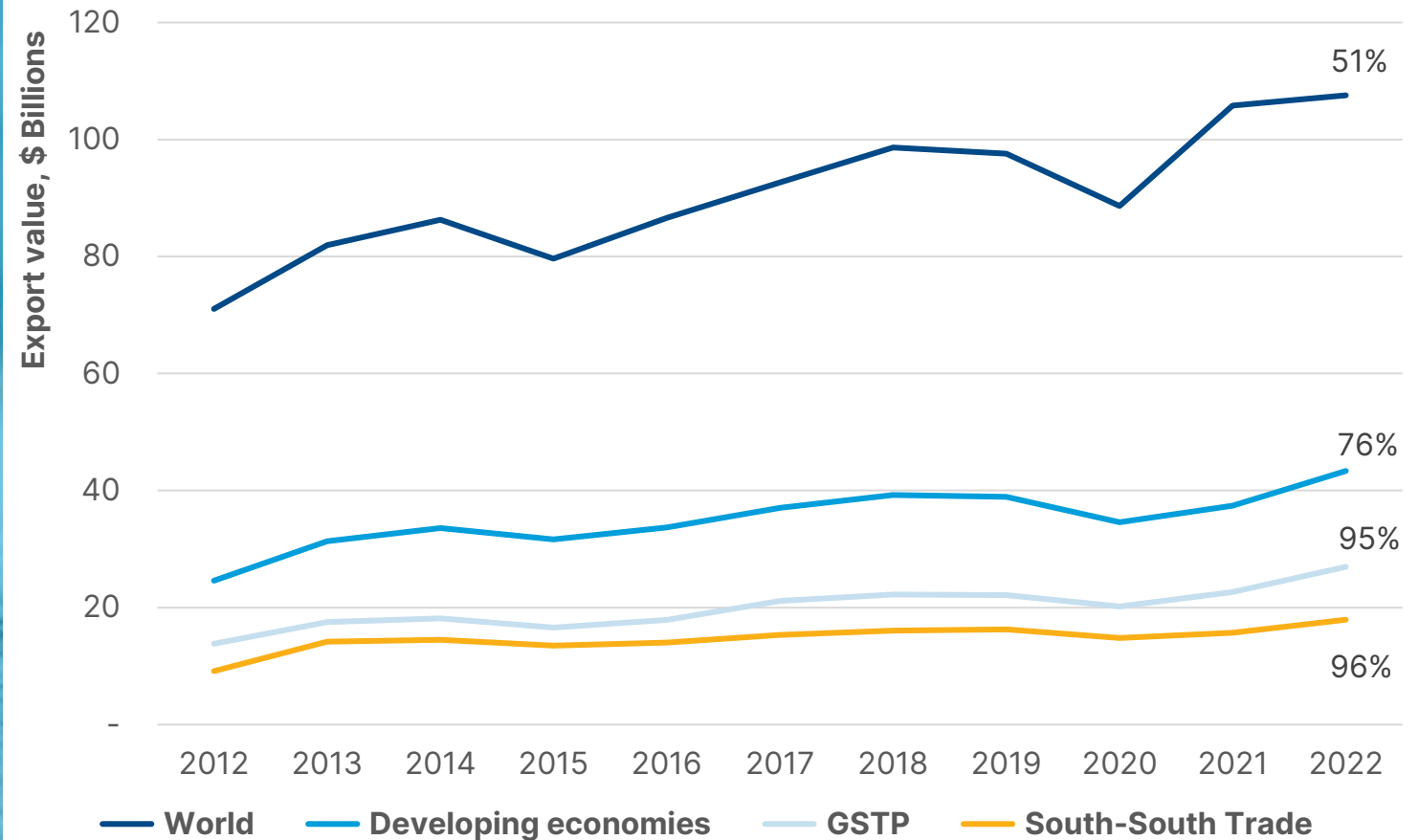
Source: UNCTAD. 2024. Ocean Trade in Goods Database



Import markets growth rates



➤ **Developing countries & GSTP participants export growth rates in primary marine fisheries and aquaculture surpasses global rates over the last decade (2012–2022).**

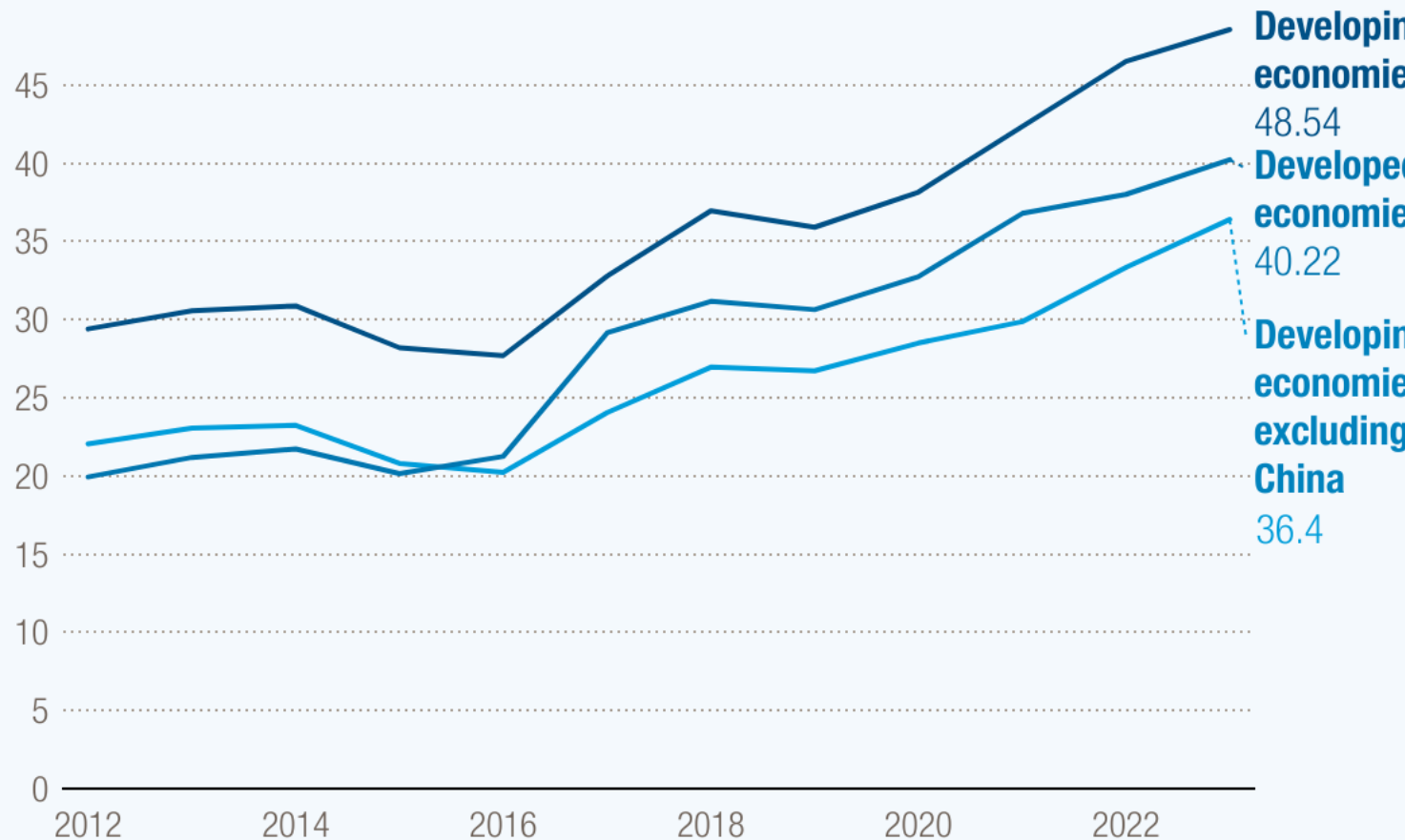


➤ **Developing countries
are capturing the
value addition in
processing**



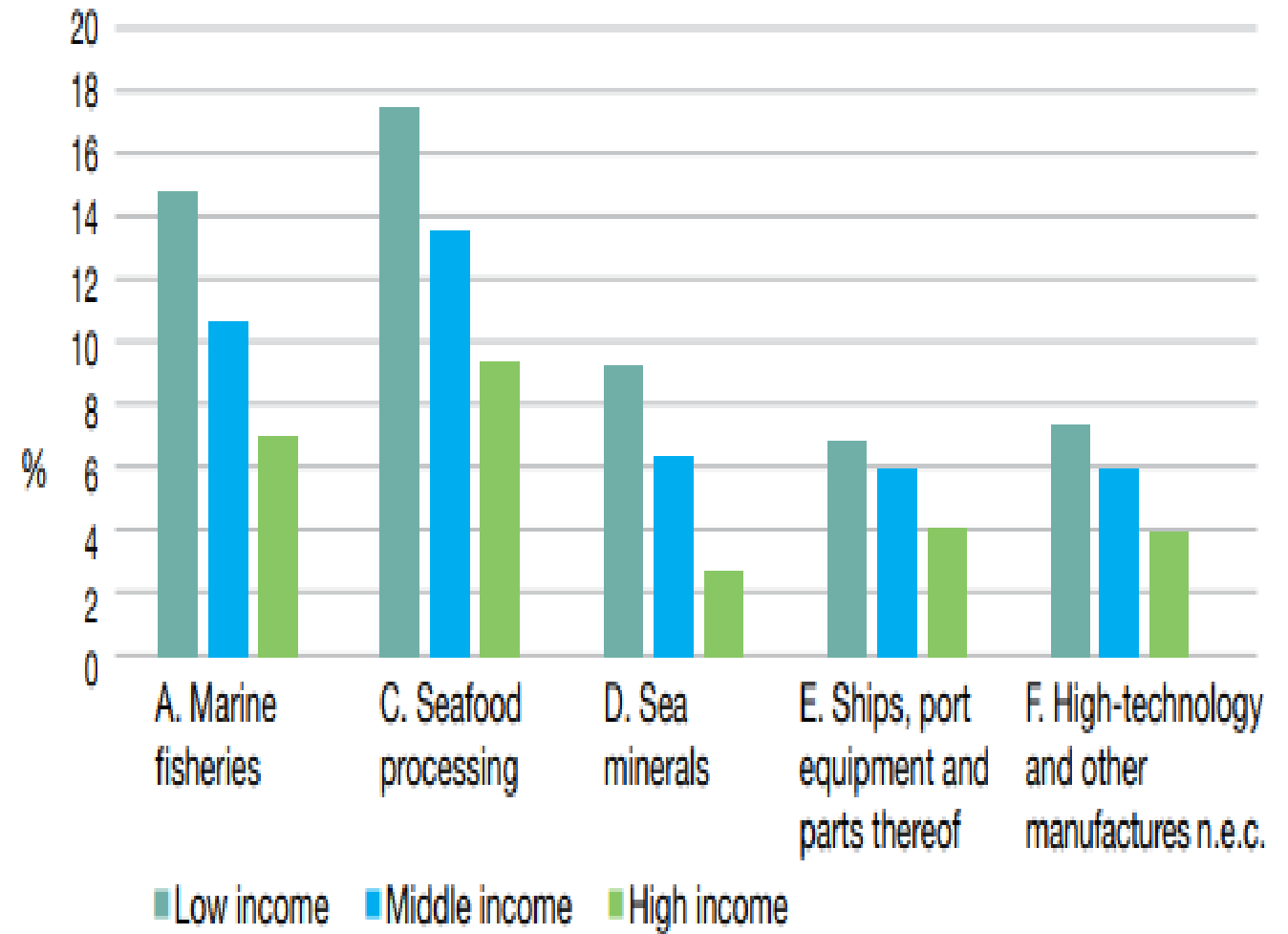
Seafood Processing: Moving up the Value Chain

Developing economies accounted for 55% of the \$89 billion global seafood processing exports in 2023

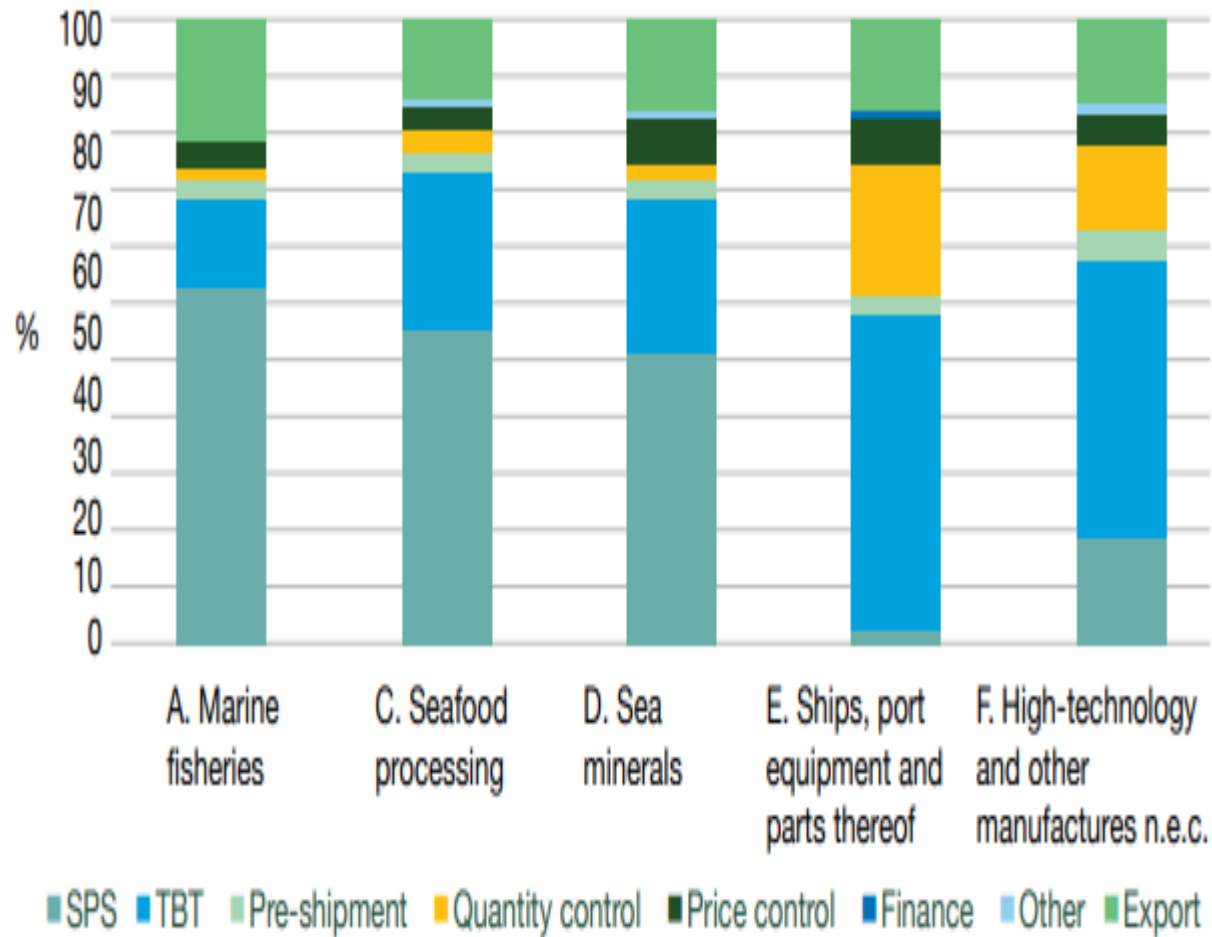


Source: UNCTAD. 2024. Ocean trade in goods database

➤ **Average MFN applied tariffs to marine fisheries and processed product are more than double than those applied to industrial products**



Source: UNCTAD calculations based on WITS, TRAINS data (2020).



Source: UNCTAD calculations based on UNCTAD TRAINS data (2020).

➤ Most non-tariff measures to primary marine fisheries & processed blue foods are related to:

SPS, TBT, & export restrictions, mostly justified by food security, safety and environmental concerns





Main challenges for market expansion & exports by Small Scale fisheries



Lack of clarity in access rights & industrial overfishing



Informality, low associativity & lack of social protection



Stringent regulations & non-tariffs measures (e.g., safety measures)



Limited access to finance & credit



Lack of market information



Poor infrastructure (e.g., inadequate cold storage & transportation facilities)



Sustainability has a cost



Economic inequality in benefits



Main opportunities for market expansion & exports by Small Scale fisheries



Marine spatial planning, recognition to access rights & co-fisheries management



Cooperatives, associations, & extended social protection for autonomous workers



Catch certificates, e-reporting & traceability systems



Targeted public support, financial education and blended finance



Online price and market information systems (SSF exporter surveys to identify NTMs)

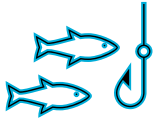


Investment in resilient fisheries infrastructure



Sustainability cost must be shared along the entire value chain

UNCTAD Resources



Trade in marine fisheries and aquaculture products

UNCTAD Ocean Trade database

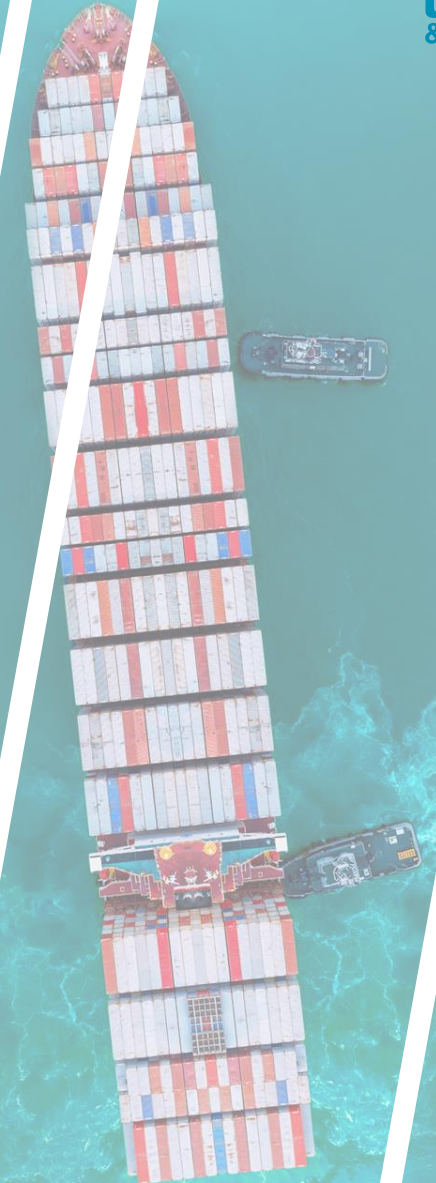
- Goods
- Services
- Individual economies and regional aggregates

UNCTAD TRAINS Database

- Tariffs
- Non-tariff measures

UNCTAD Publications (selected)

- South-South trade in the marine fisheries and aquaculture sectors (2024)
- An Ocean of Opportunities: The Potential of Seaweed (2023)
- Trade and Environment Review (2023)
- Advancing the potential of sustainable ocean-based economies: trade trends, market drivers and market access (2021)



Thank you

