

# FISHERIES AND AQUACULTURE PRODUCTS AND INTERNATIONAL MARKETS IN A NUTSHELL

## “Facilitating Market Access of Fish and Fishery Products for International Trade”

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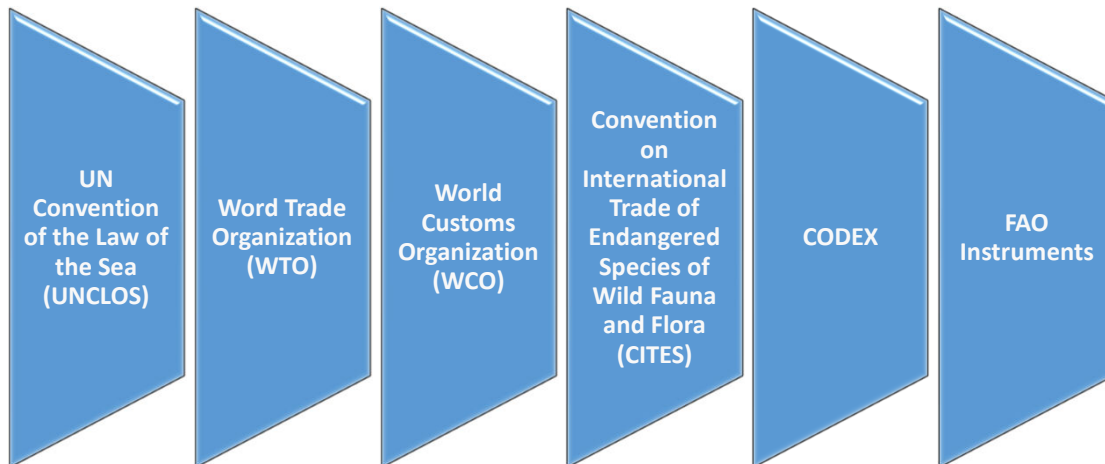
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# International Instruments and Guidances



2

## The Main International Instruments setting the Applicable Overall Framework

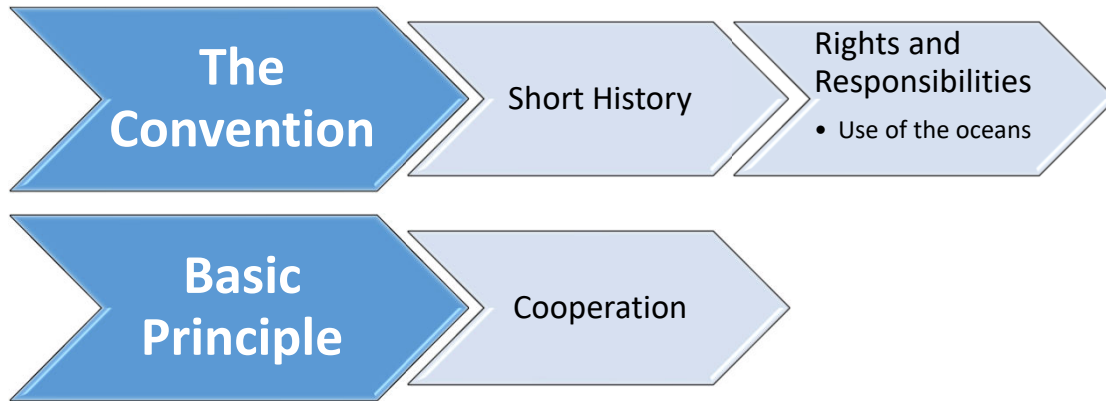


## And More Recently

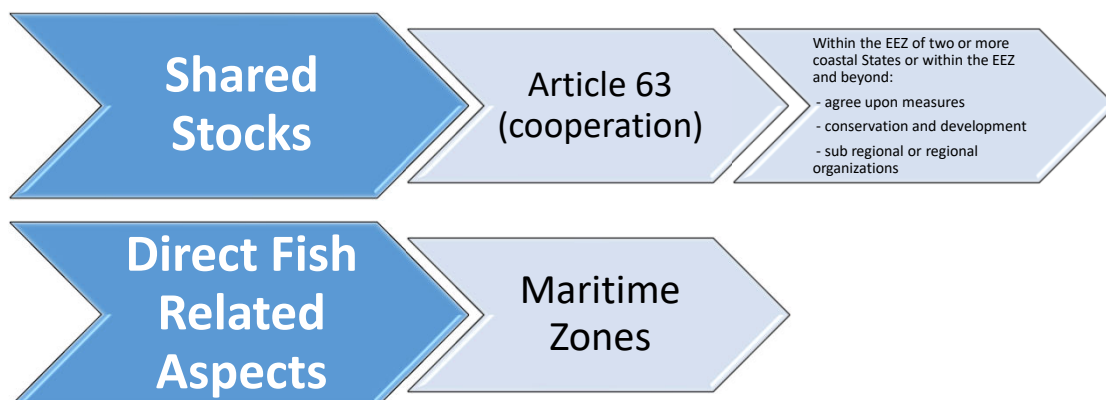
The WTO Agreement on  
Fisheries Subsidies

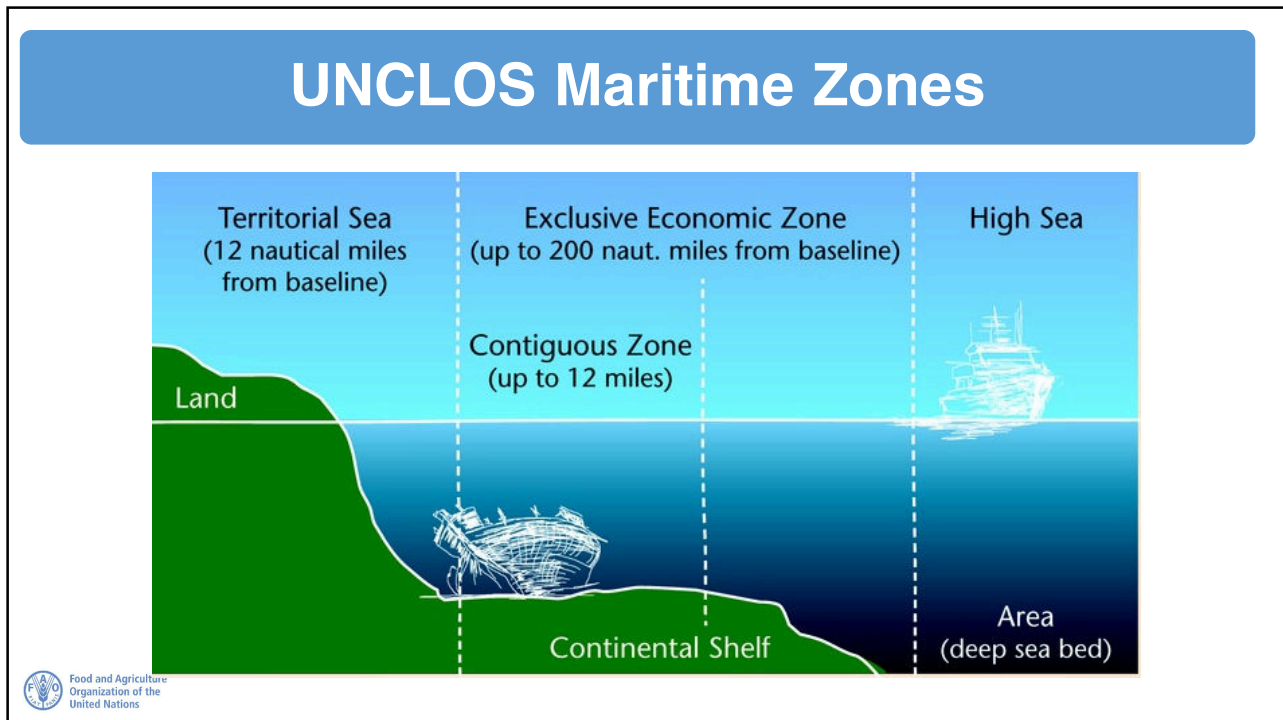
The High Seas Treaty

## UN Convention on the Law of the Sea (UNCLOS)

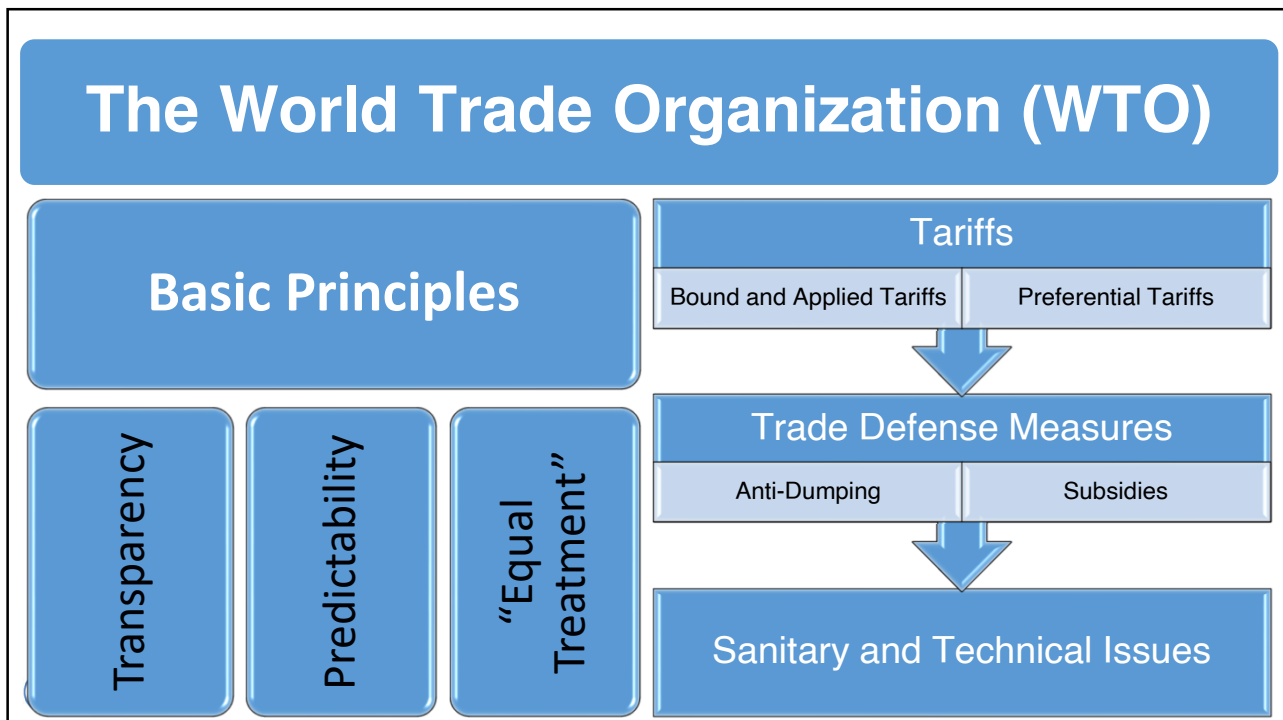


## UN Convention on the Law of the Sea (UNCLOS)





7



8

# The World Customs Organization

## Harmonized System

Classification of  
Products

6-digit Level

## Main Areas for Fish Products

- Live
- Fresh or chilled
- Frozen
- Fillets
- Dried, salted or in brine
- Smoked
- Crustaceans
- Molluscs
- Aquatic invertebrates
- Seaweeds and other *algae*
- Fats and oils
- Prepared or preserved

9

# The World Customs Organization

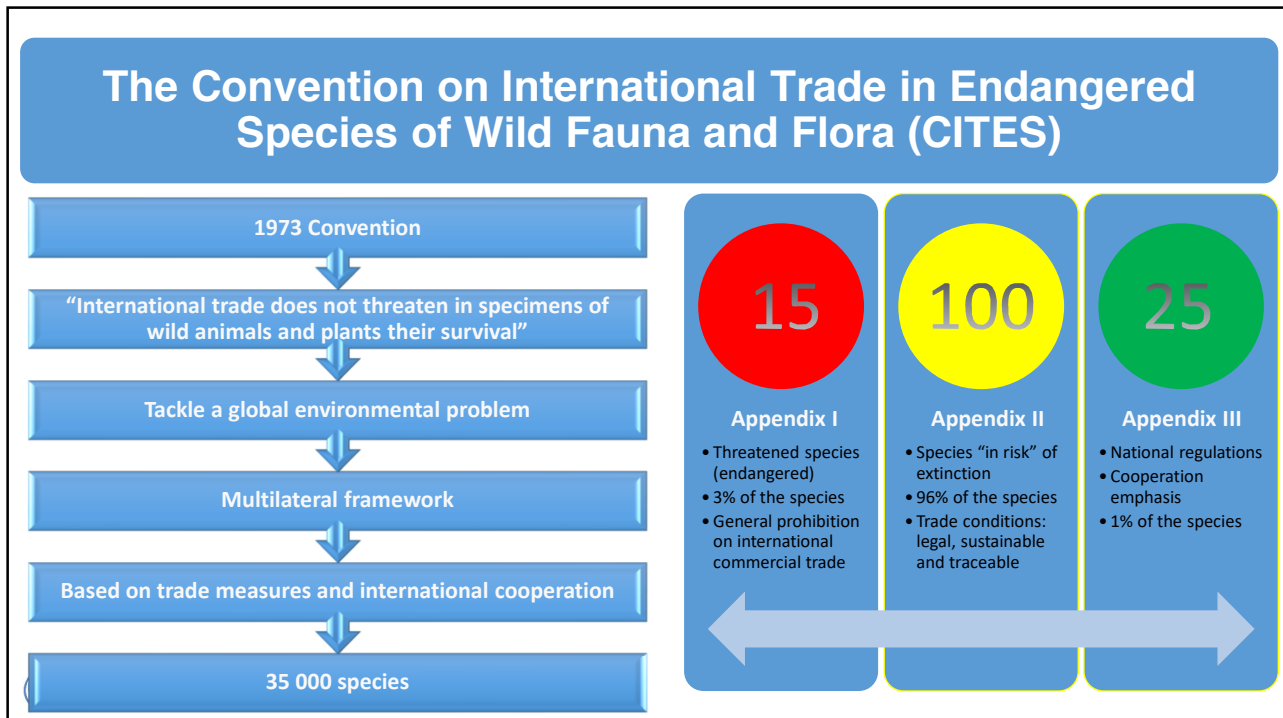
## National Classifications

Freedom after 6-digit  
level

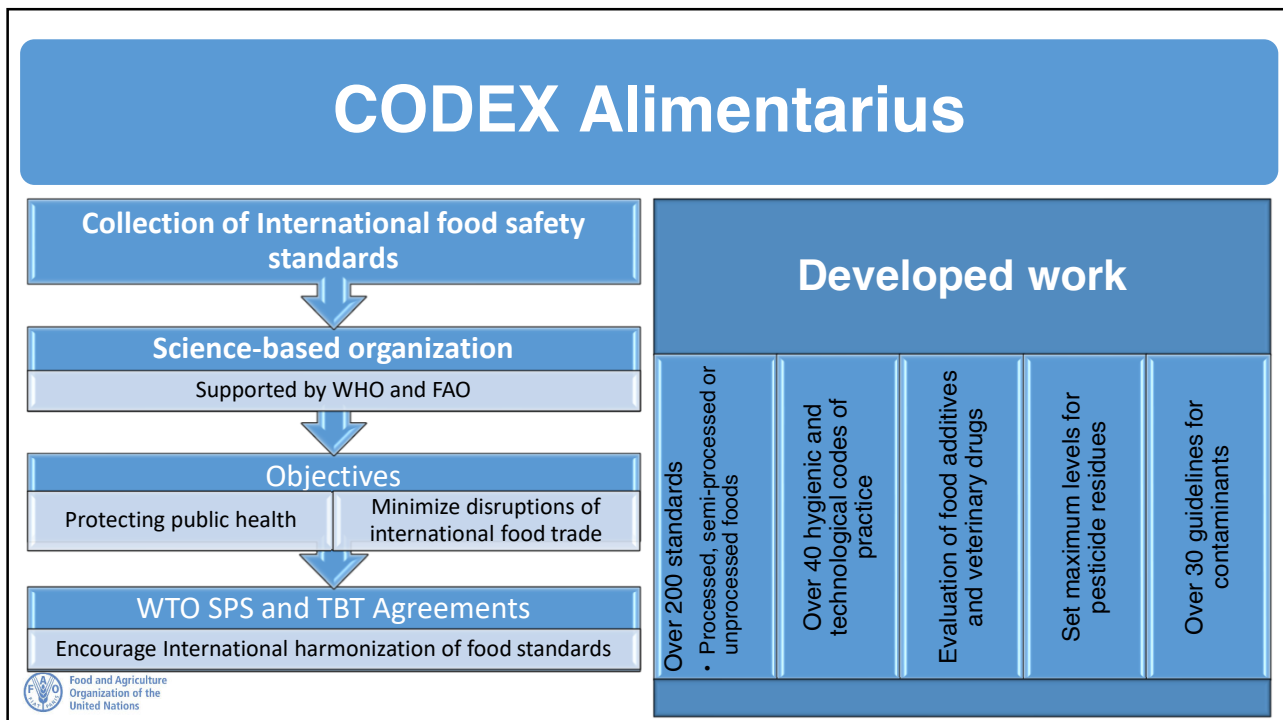
Statistical, monitoring  
and control, and fiscal  
purposes

Heading	H.S. Code
03.03	<b>Fish, frozen, excluding fish fillets and other fish meat of heading 03.04.</b> - Salmonidae, excluding edible fish offal of subheadings 0303.91 to 0303.99 : 0303.11 -- Sockeye salmon (red salmon) ( <i>Oncorhynchus nerka</i> ) 0303.12 -- Other Pacific salmon ( <i>Oncorhynchus gorbuscha</i> , <i>Oncorhynchus keta</i> , <i>Oncorhynchus tshawytscha</i> , <i>Oncorhynchus kisutch</i> , <i>Oncorhynchus masou</i> and <i>Oncorhynchus rhodurus</i> ) 0303.13 -- Atlantic salmon ( <i>Salmo salar</i> ) and Danube salmon ( <i>Hucho hucho</i> ) 0303.14 -- Trout ( <i>Salmo trutta</i> , <i>Oncorhynchus mykiss</i> , <i>Oncorhynchus clarki</i> , <i>Oncorhynchus aguabonita</i> , <i>Oncorhynchus gilae</i> , <i>Oncorhynchus apache</i> and <i>Oncorhynchus chrysogaster</i> ) 0303.19 -- Other - Tilapia ( <i>Oreochromis</i> spp.), catfish ( <i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.), carp ( <i>Cyprinus</i> spp., <i>Carassius</i> spp., <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i> , <i>Catla catla</i> , <i>Labeo</i> spp., <i>Osteochilus hasselti</i> , <i>Leptobarbus hoeveni</i> , <i>Megalobrama</i> spp.), eels ( <i>Anguilla</i> spp.), Nile perch ( <i>Lates niloticus</i> ) and snakeheads ( <i>Channa</i> spp.), excluding edible fish offal of subheadings 0303.91 to 0303.99 : 0303.23 -- Tilapia ( <i>Oreochromis</i> spp.) 0303.24 -- Catfish ( <i>Pangasius</i> spp., <i>Silurus</i> spp., <i>Clarias</i> spp., <i>Ictalurus</i> spp.) 0303.25 -- Carp ( <i>Cyprinus</i> spp., <i>Carassius</i> spp., <i>Ctenopharyngodon idellus</i> , <i>Hypophthalmichthys</i> spp., <i>Cirrhinus</i> spp., <i>Mylopharyngodon piceus</i> , <i>Catla catla</i> , <i>Labeo</i> spp., <i>Osteochilus hasselti</i> , <i>Leptobarbus hoeveni</i> , <i>Megalobrama</i> spp.)

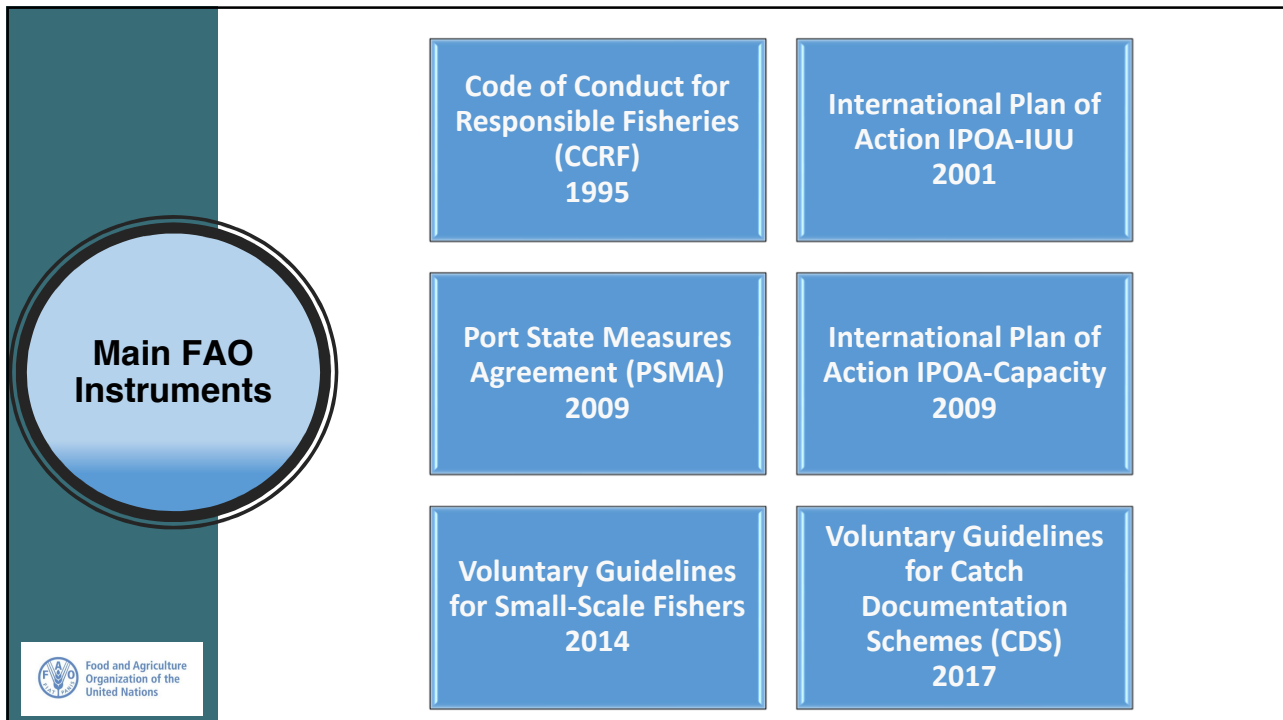
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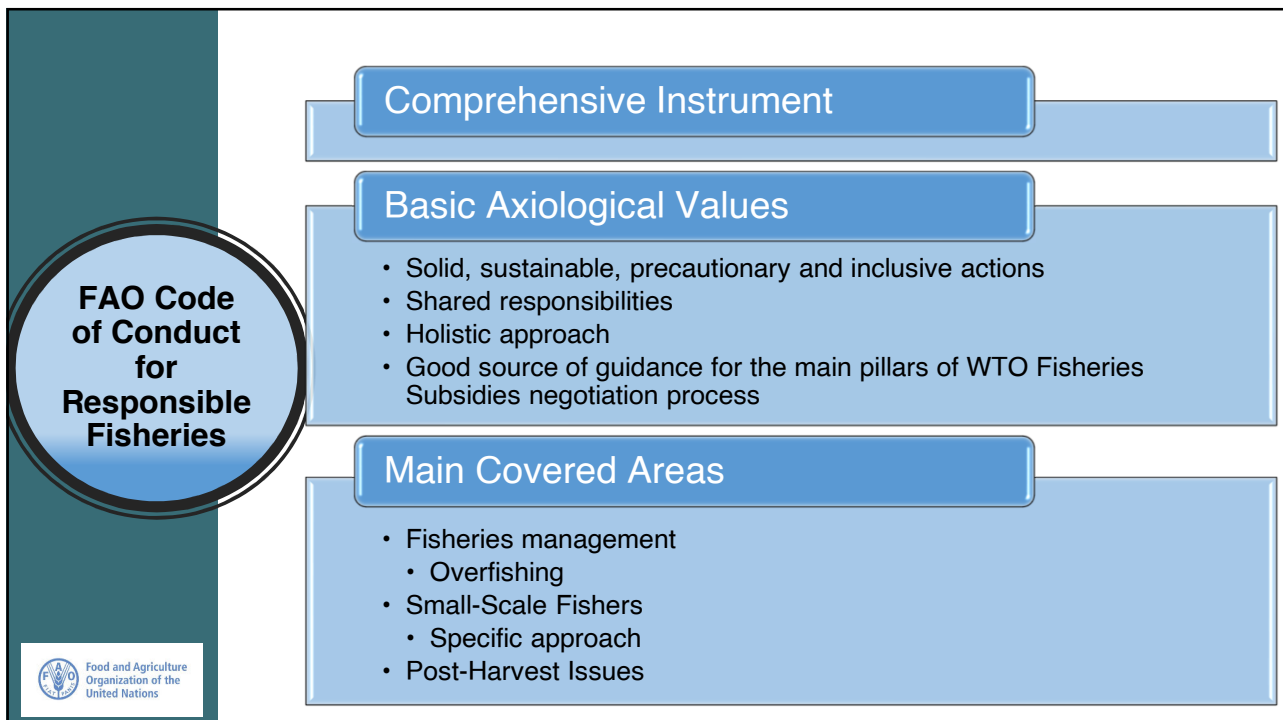
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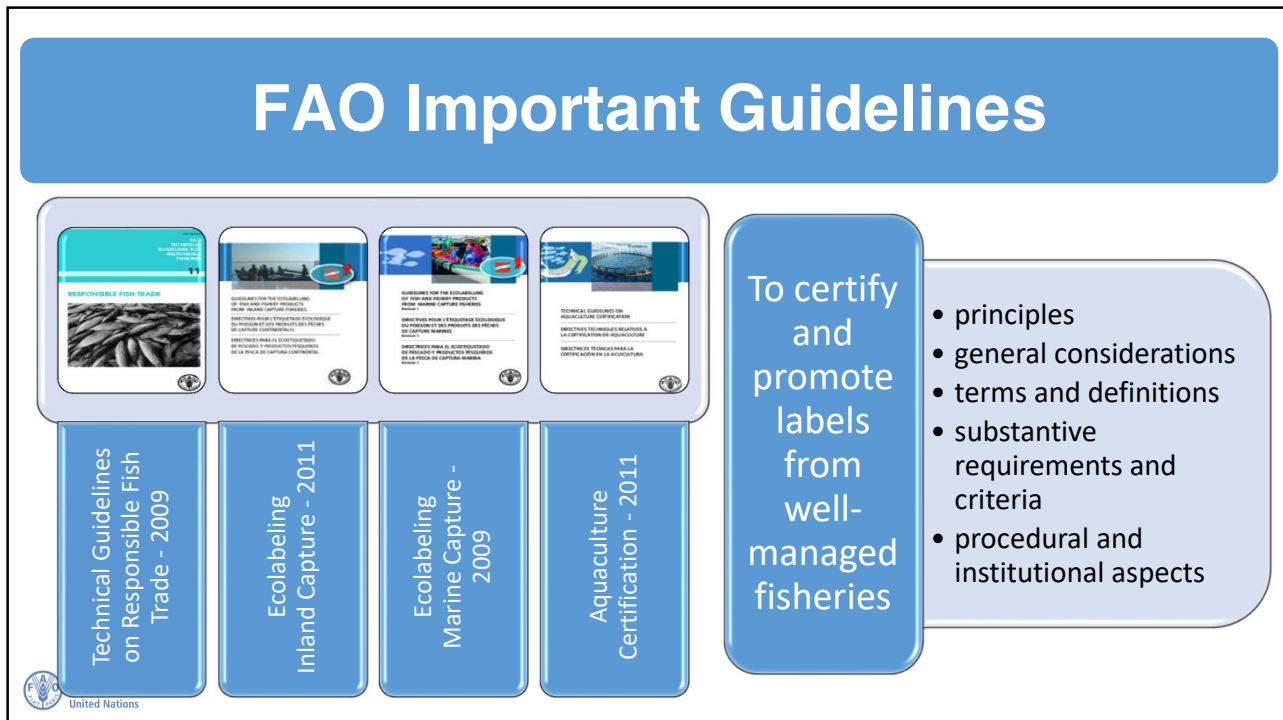
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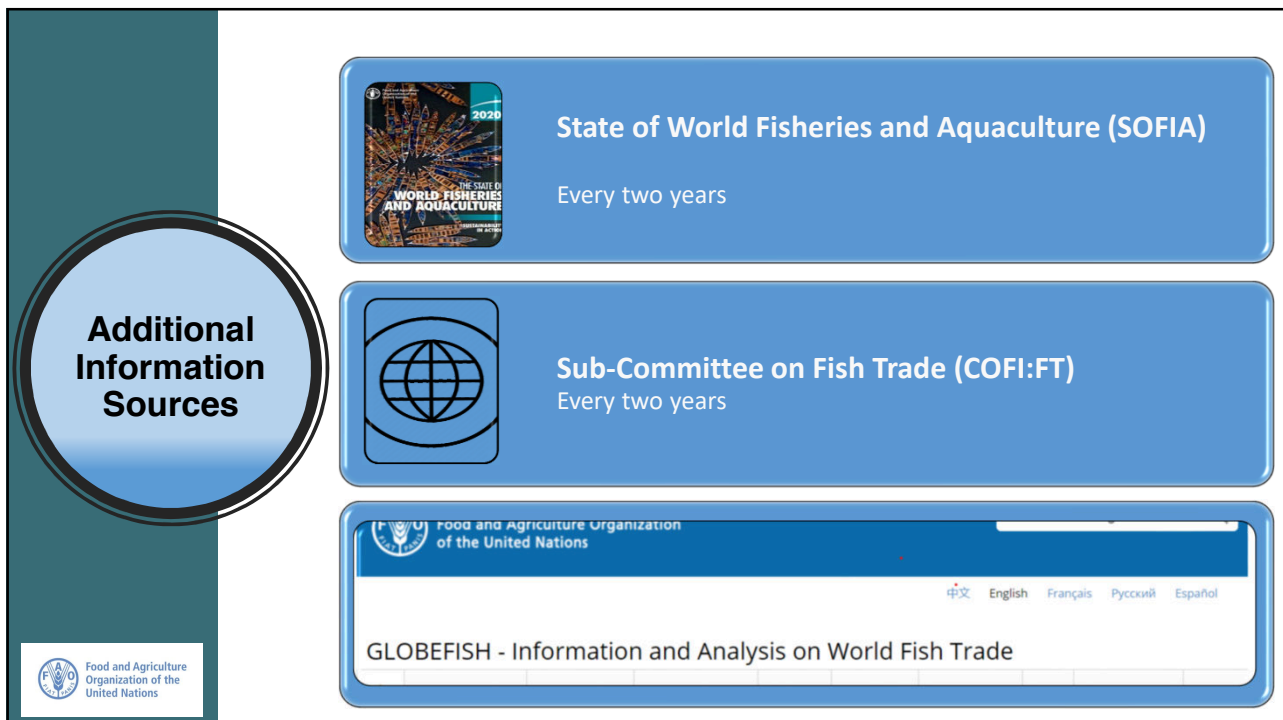
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16



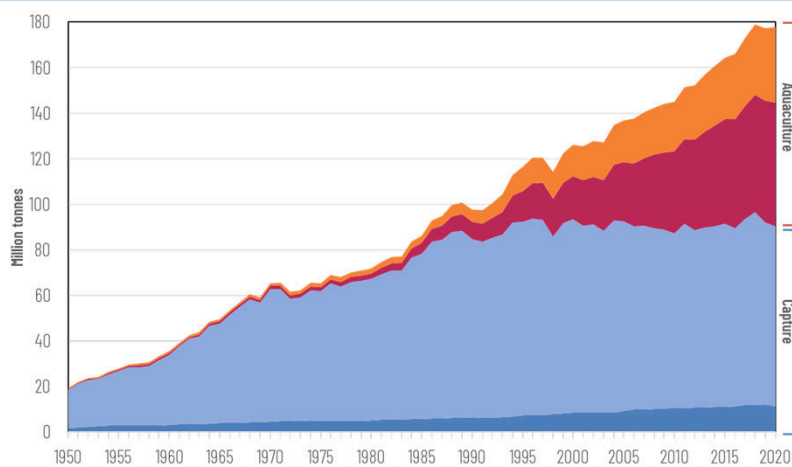
# Fisheries and Aquaculture Products

## Production and Trade



17

## FISHERIES AND AQUACULTURE



**ANIMAL PRODUCTION = 178 Mt**

**Capture fisheries = 90.3 Mt** 2.1%  
(12.7% Inland)

**Aquaculture = 87.5Mt** 2.7%  
(62.2% Inland)

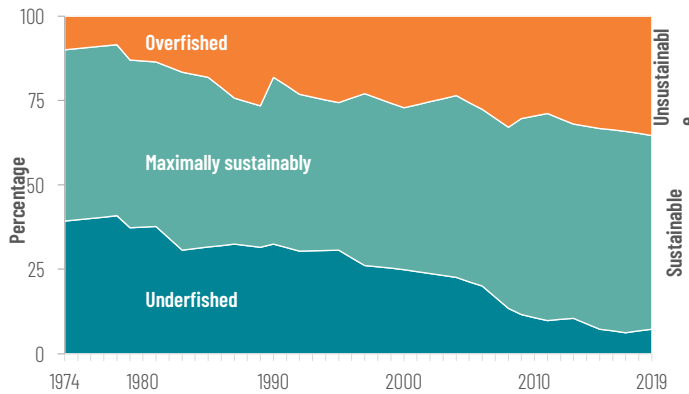
**ALGAE PRODUCTION = 36 Mt** 1.4%



■ Capture fisheries - inland waters ■ Capture fisheries - marine waters  
■ Aquaculture - inland waters ■ Aquaculture - marine waters

18

## Sustainability Challenges



64.6 % of  
stocks  
by number

82.5 % of  
landings  
by volume

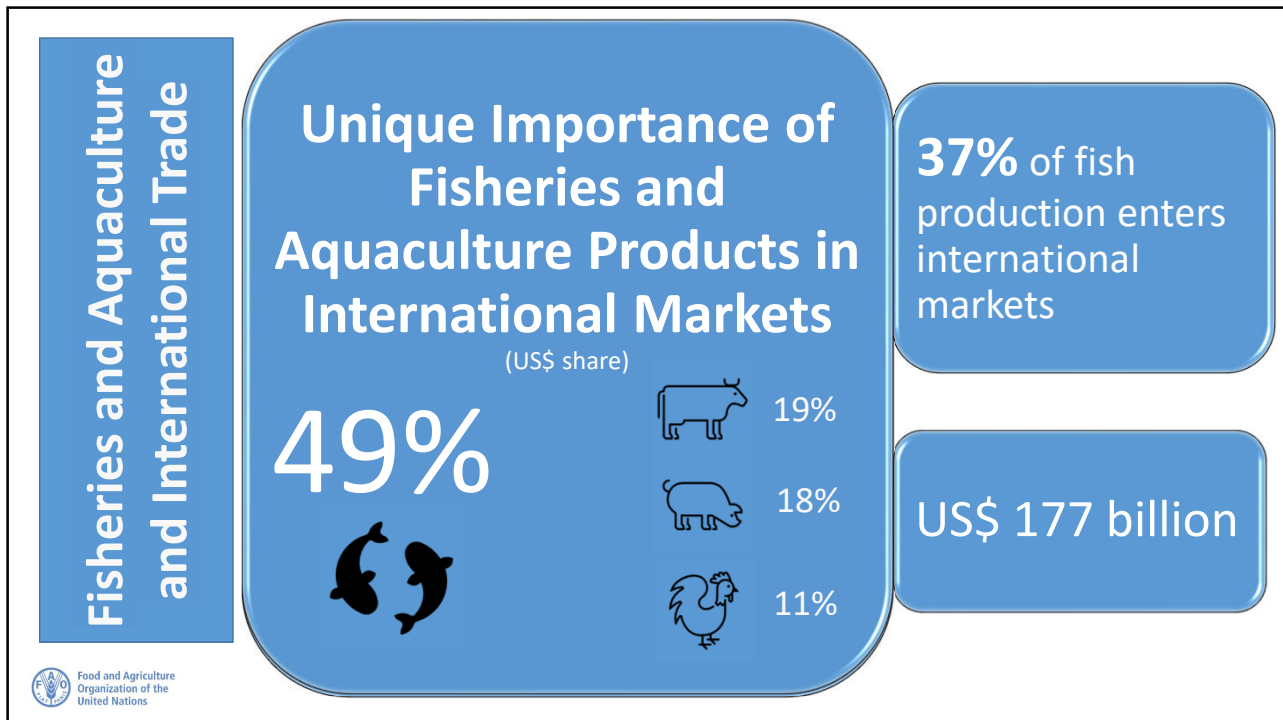
1.2  
%

3.8  
%

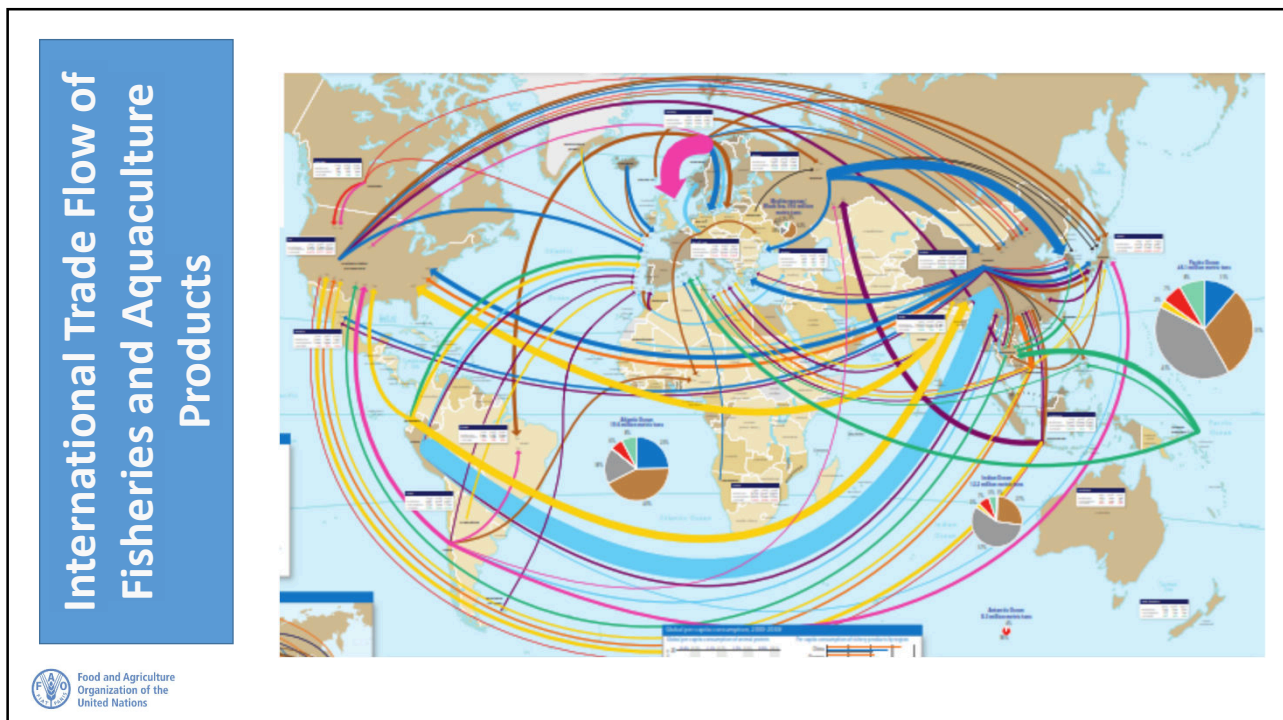
Constant  
increase of  
overfished  
stocks in the  
last years

The status of  
fish stocks vary  
substantially  
between  
regions

## A True International Commodity

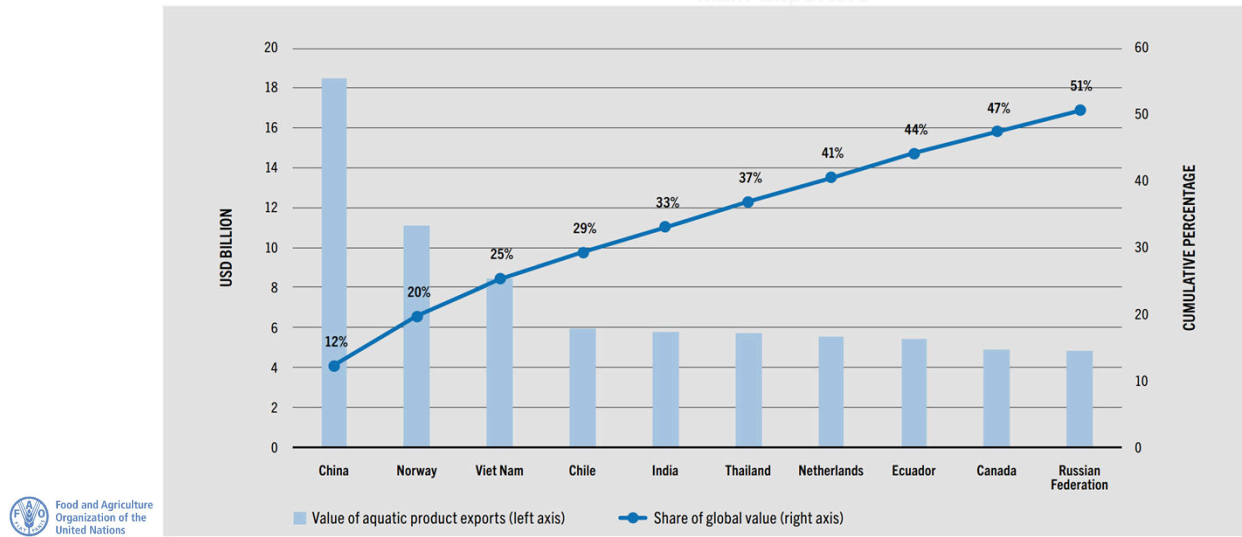


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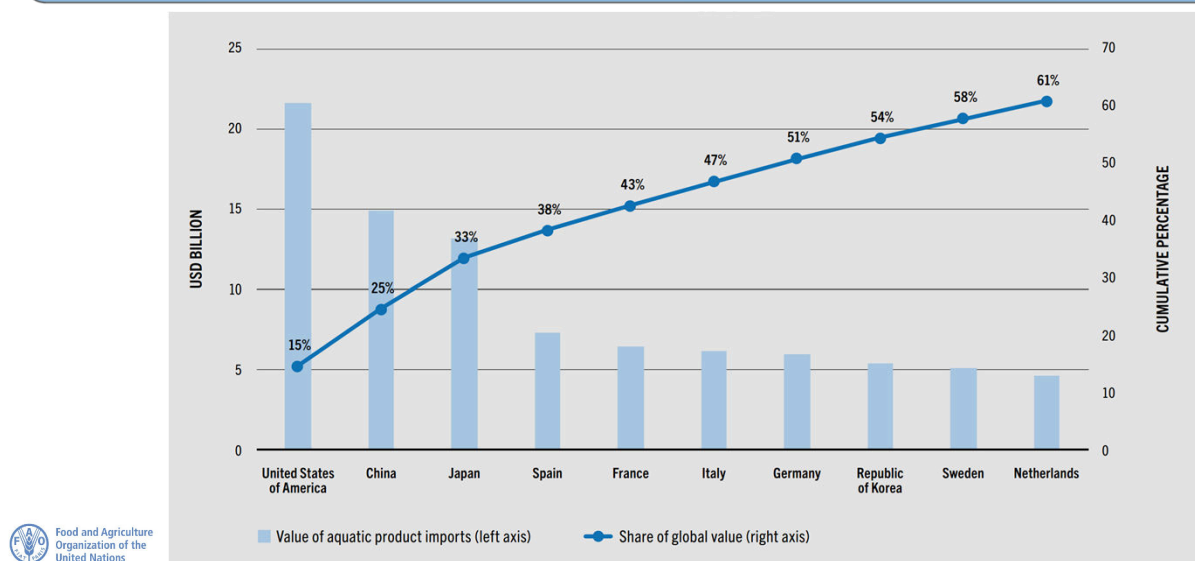
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## Main Exporters

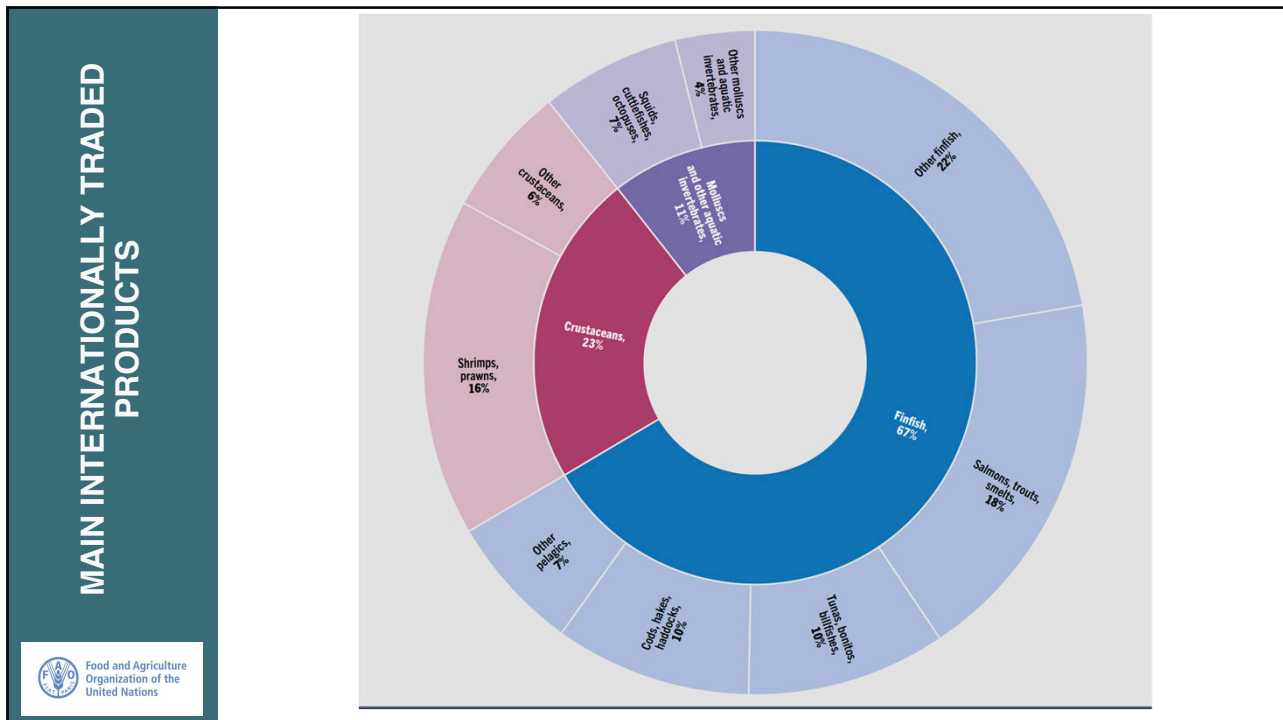


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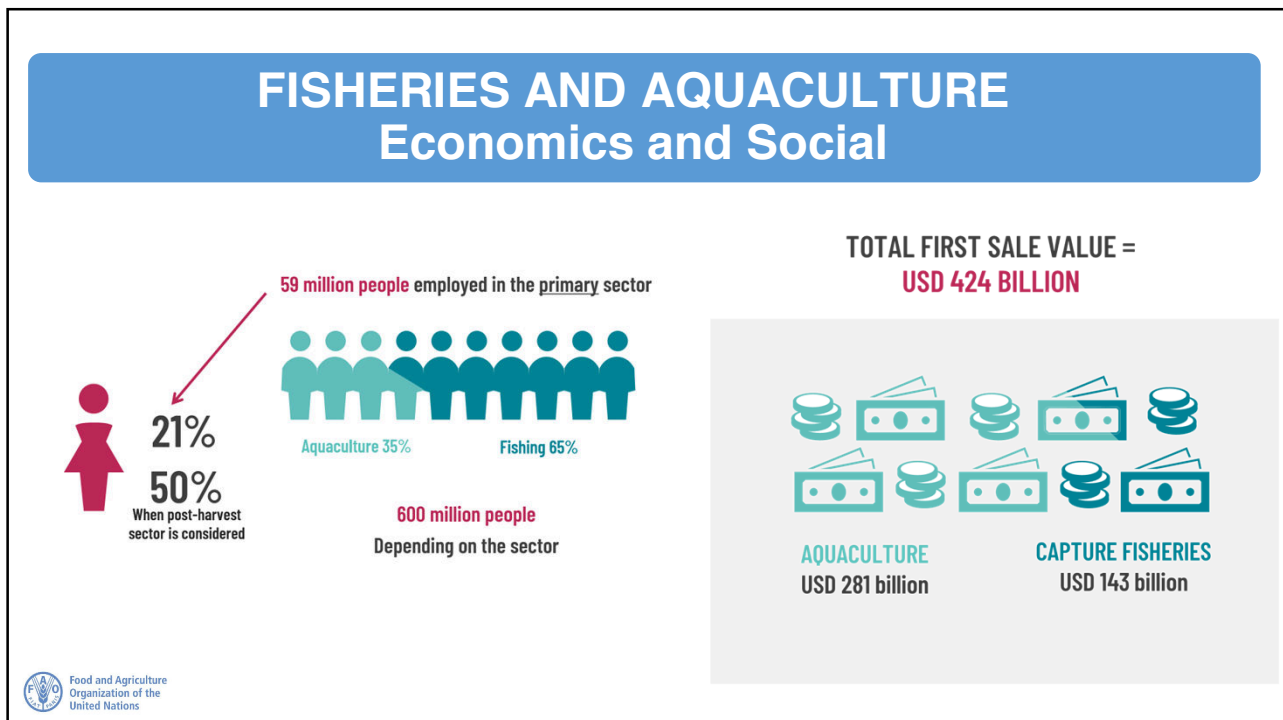
## Main Importers



24



25



26

## A COMPREHENSIVE APPROACH IS NECESSARY TO UNDERSTAND THE INDUSTRY

Fisheries and aquaculture patterns and trends

Considerably different from other animal proteins

Uniqueness of production and trade

Opportunities

Type of  
Production

- Capture Fisheries
- Aquaculture

Type of  
Producers

- Industrial
- Small-Scale
- Women



27

## Main Market Trends and the basic Characteristics of the Sector in a Nutshell

Combination of  
International trade with new  
market opportunities in local  
and regional markets

- Shortening the value chain
- Reducing logistics impacts
- Assessing new markets

“Know your product”  
approach by consumers

- Positive impact on certification
- Importance of fisheries management
- Food safety compliance even more critical

Other Market Trends

- E-Business
- New packing needs

Continuous cooperation  
between business,  
governments and  
organizations

- Information sharing
- Better way to overcome any challenges

Production from two different sources:  
**Aquaculture and Wild-capture fisheries**

Significant production share of  
**developing countries**

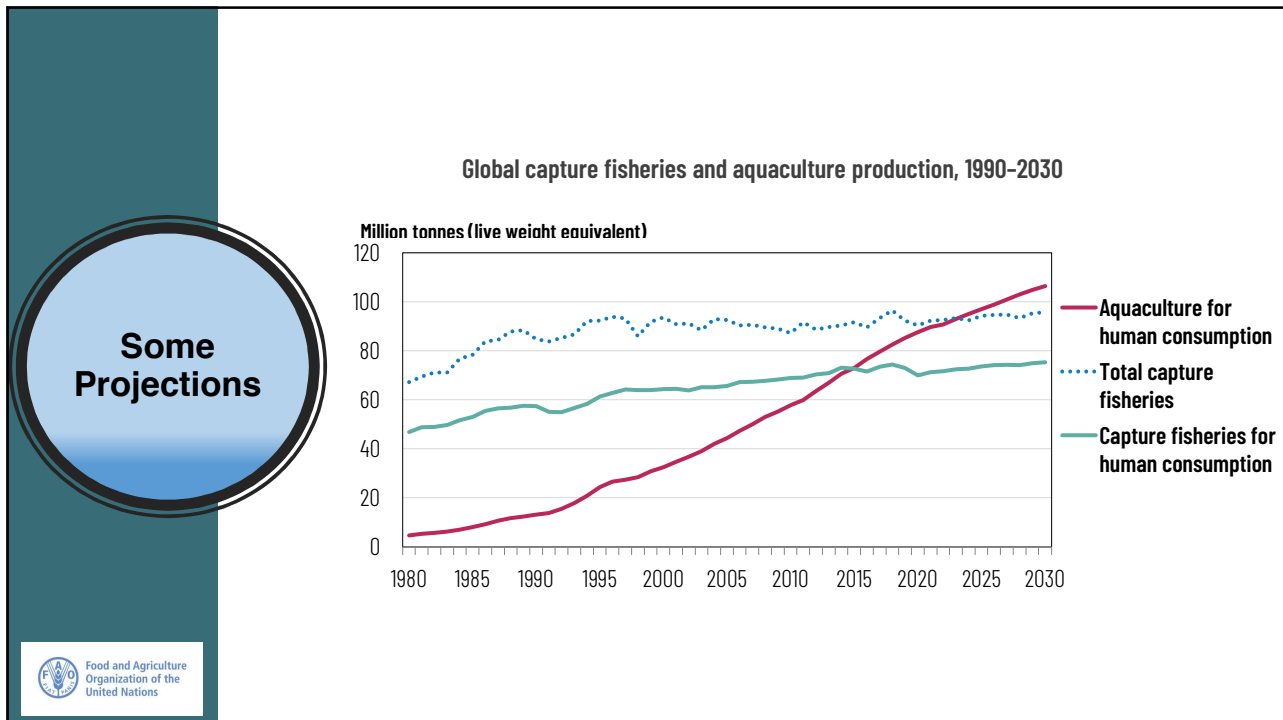
Importance of **international trade**

**Long** value chains

**Inclusive** production pattern (countries,  
small-scale, gender)



28



29



30

## What is “market access” (broad sense)?

A set of “external” conditions shaping access potential  
to foreign markets

They can be set by the government or by specific demand of buyers

### Most common “market access” requirements

#### Private sector

- Certification of fisheries and aquaculture products

#### Government

- SPS and TBT requirements
- Legality and traceability
- Tariffs

The possibility of having preferential market access is a key element in the competitiveness of countries and companies

## Tariffs and Market Access

### Types of Tariffs

- Applicable tariffs
- Preferential tariffs

### Preferential tariffs

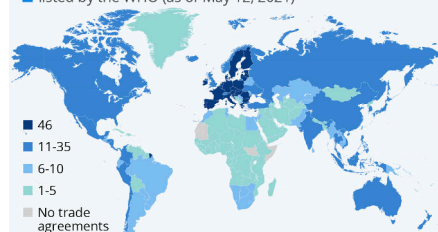
- Huge impact on market access
- Tariffs can be reduced from 20-10% to 0%

### Types of preferential tariffs

- Granted
- Negotiated

### Which Countries Have the Most Trade Agreements?

Active regional trade agreements as  
listed by the WTO (as of May 12, 2021)



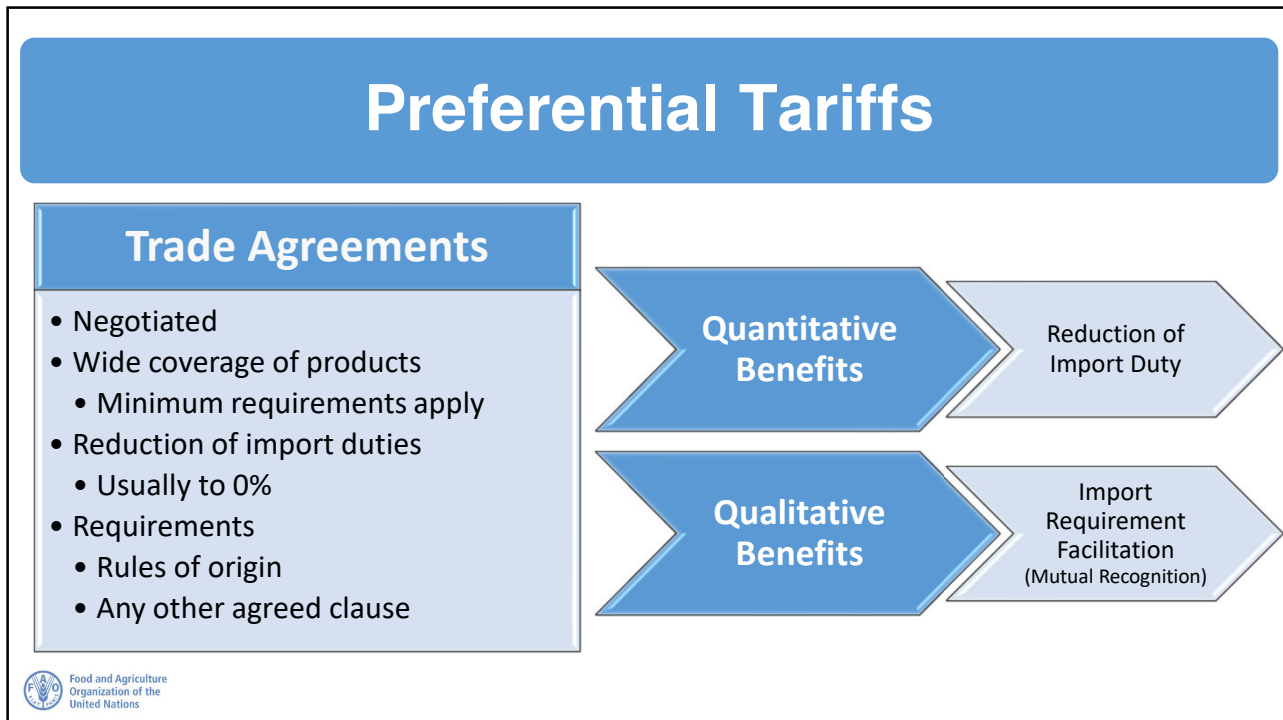
Agreements made as a pre-existing group counted individually for each country  
Source: WTO



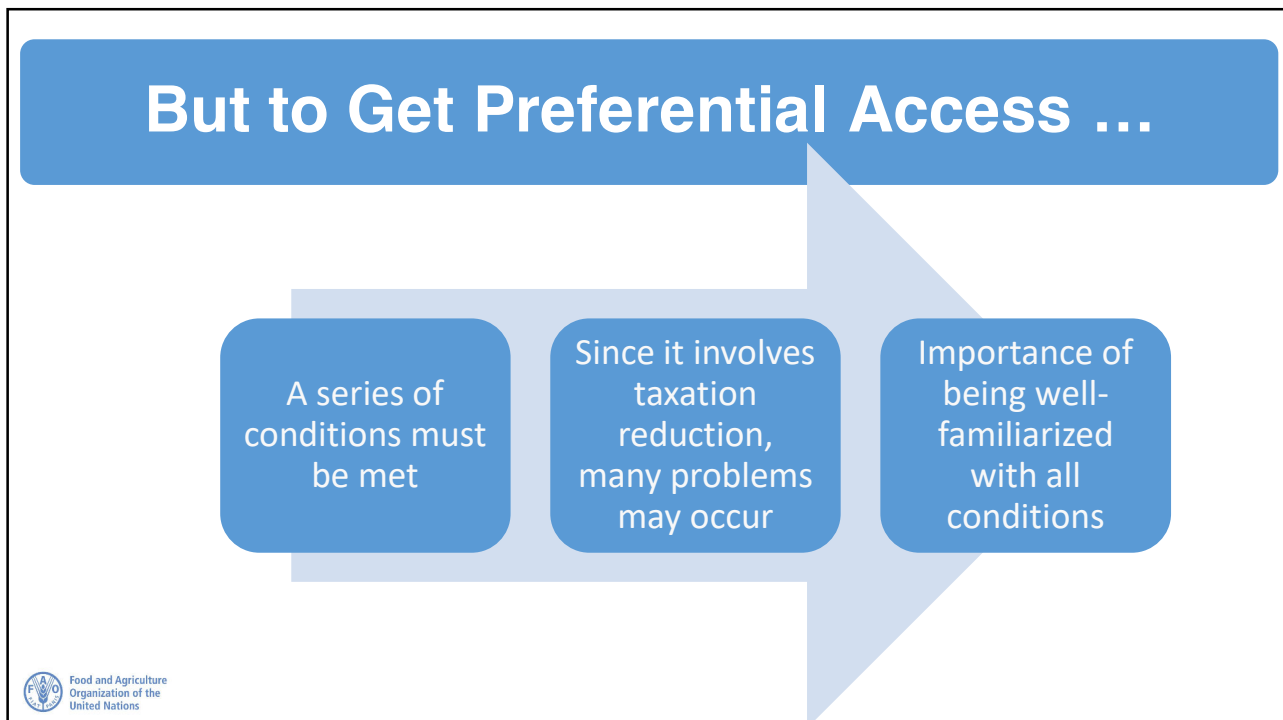
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[Evolution of Trade Agreements](#)





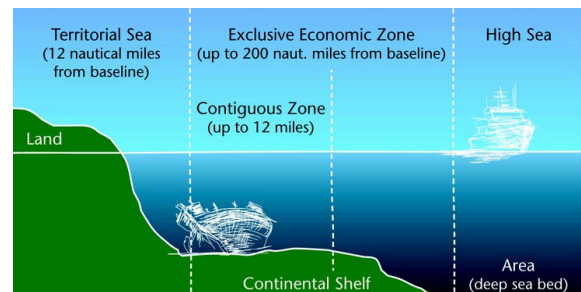
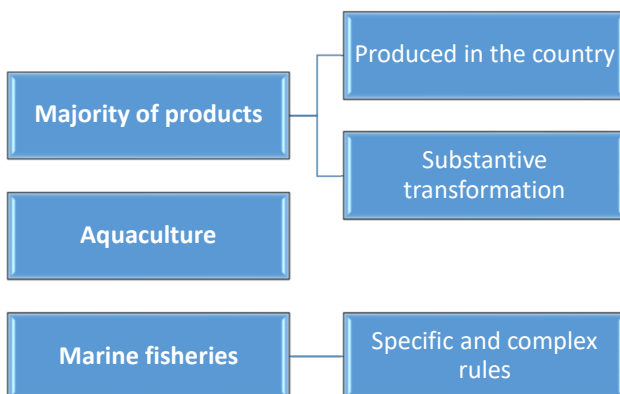
33



34

## In preferential access, how to determine the origin of a product?

## INTERNATIONAL TRADE AGREEMENTS The Origin of Products



## Preferential Trade – Rules of Origin

### Territory Rule

- Live animals born and raised there
- Products from live animals raised there
- Products obtained by hunting or fishing conducted there
- Products of sea fishing and other products taken from the sea outside the territorial waters of countries A or B by their vessels

### Vessel Rule

- Registered or recorded in countries A or B
- Sailing under the flag of country A or B
- Owned by nationals of country A or B
- Masters and officers from country A or B
- Minimum percentage of crew being nationals of country A or B



37

## Traditional and “Modern Clauses” in Trade Agreements



38

## Common Trade Agreement Clauses

### Traditional Trade Agreements

- Overall clauses of the trade agreement to get the tariff reduction
- Concentrated on trade clauses
  - Rules of origin
  - Tariff reduction

### New Generation of Trade Agreements

- Introduction of non-trade clauses to allow the tariff reduction to be applied
- Clauses with a global interest but beyond the traditional trade analysis
  - Environmental clauses
  - IUU fishing
  - Fisheries subsidies

## The Comprehensive Agreement for Progressive Trans-Pacific Partnership (CPTPP)

### Trade Agreement Coverage

- Countries  
Australia, Brunei  
Darussalam, Canada,  
Chile, Japan, Mexico,  
New Zealand, Peru,  
Singapore, Viet Nam and  
expanding!
- 14% of global production
- Intra CPTTP trade: US\$  
6.3 billion

### New Generation Clauses

- The protection of the ozone layer
- Ship pollution
- Biodiversity conservation
- Invasive species
- Illegal wildlife trade
- Marine capture fisheries
- Fisheries management
- Conservation measures
- Fisheries subsidies

# Non-Traditional Clauses are becoming the “New Normal” of Trade Agreements



41

## Other Market Access Requirements

Legality of  
the products

Traceability

Certification  
“market  
driven”

Product  
Information  
“Know your  
product!”



42

## Sustainable Fish Trade For Today and Tomorrow



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Food and Agriculture  
Organization of the  
United Nations