The OECD Fisheries Support Estimate

A key source of data in support of fisheries subsidies reform

FAO Regional Workshop on understanding fisheries support measures in the Asian context

Bangkok, 17-19 October 2023

Claire Delpeuch, Head of the OECD Fisheries and Aquaculture Unit

Why invest in fisheries policy data?

Monitoring and analysing fisheries policy across member and partner countries

Latest Edition

OECD Review of Fisheries 2022

The *OECD Review of Fisheries 2022* brings together and analyses data on fisheries management and support policies to inform decision makers and help foster sustainable and resilient fisheries that can provide jobs, food, and livelihoods for future generations. The *Review* assesses the he

More

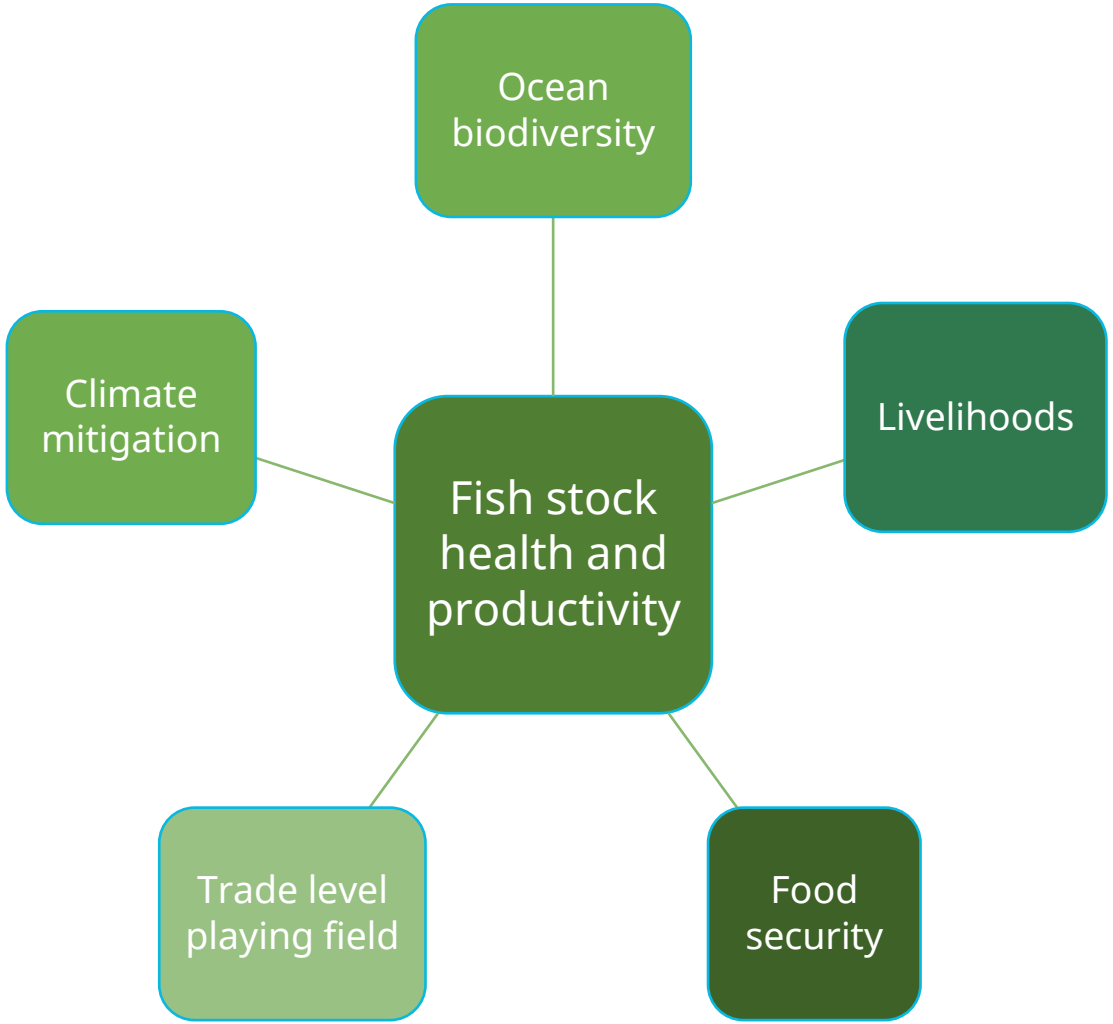
The Policy Briefs for the OECD Review of Fisheries 2022 report provide a summary of key findings, the latest data, and what policy makers can do to support sustainable fisheries and aquaculture.

» **Managing fish stocks sustainably** (**Español**, **Português**, **中文**)

» **Supporting sustainable fisheries** (**Español**, **Português**, **中文**)

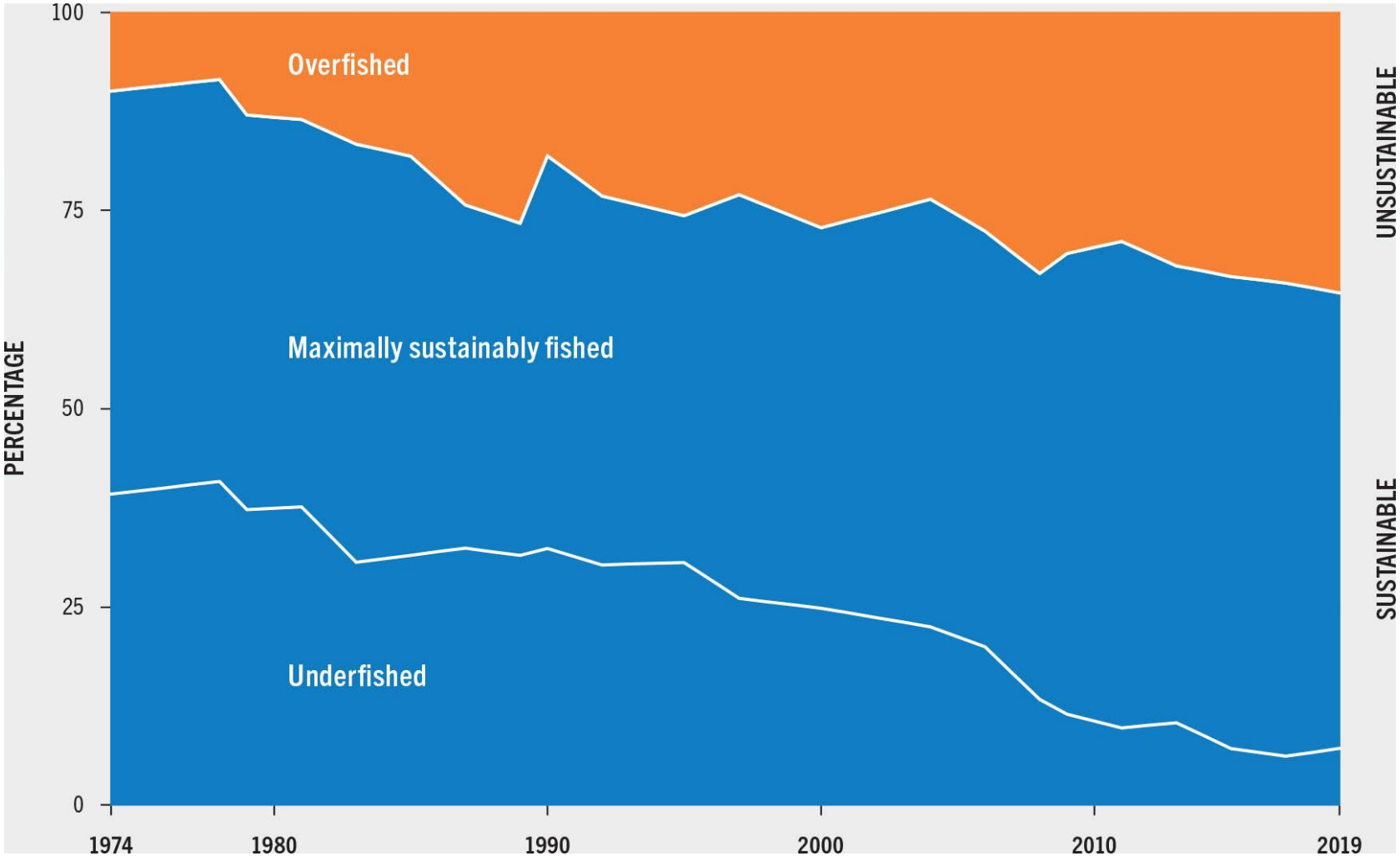
» **Eliminating government support to illegal, unreported and unregulated (IUU) fishing** (**Español**, **Português**, **中文**)

A strong focus on fisheries sustainability



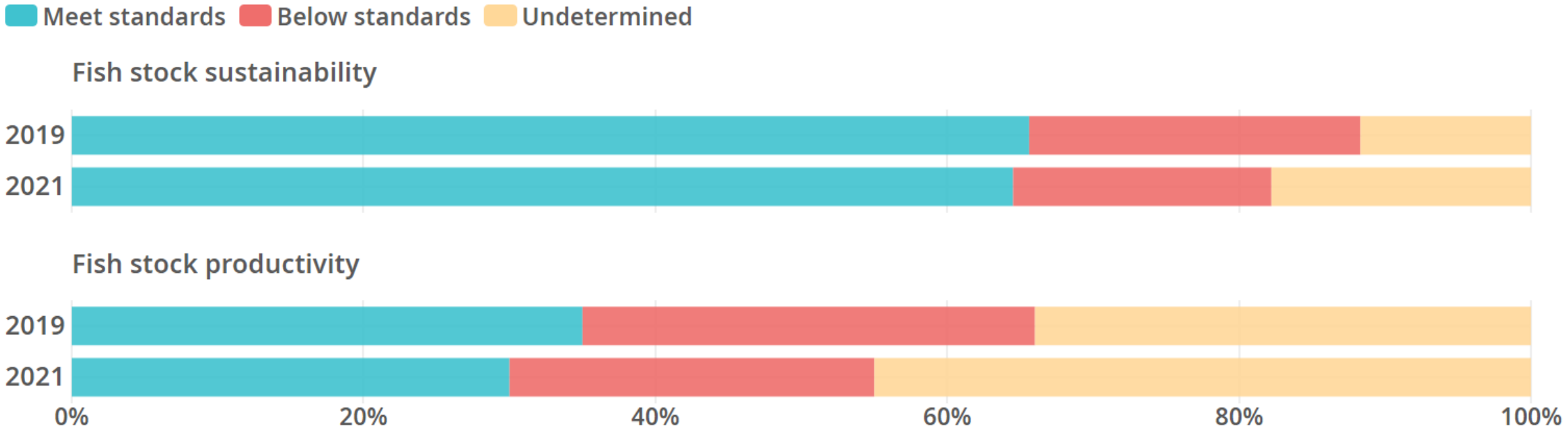
FAO data shows that globally, and in many sea regions, fish stock sustainability is still declining

GLOBAL TRENDS IN THE STATE OF THE WORLD'S MARINE FISHERY STOCKS, 1974–2019



FAO, SOFIA 2022

Looking at assessed fish stocks with the OECD approach also calls for reform



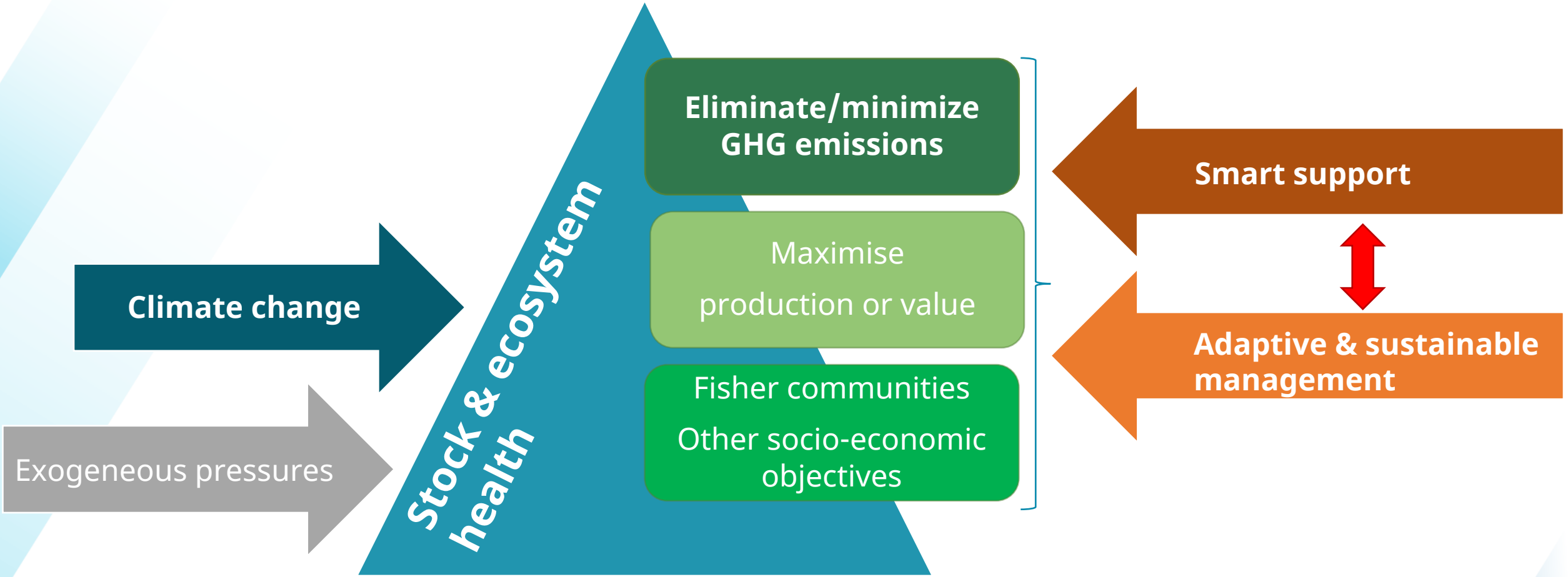
Source: OECD (2022), OECD Review of Fisheries 2022.

Source: OECD Review of fisheries 2022, Fisheries and Aquaculture Indicators, http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_INDICATORS

Looking at assessed fish stocks with the OECD approach also calls for reform

Source: OECD Review of fisheries 2022, Fisheries and Aquaculture Indicators, http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_INDICATORS

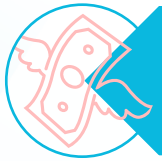
What can policy-makers do?



Source: OECD Review of fisheries (2022); Martini and Innes (2018)

The OECD Fisheries Support Estimate database

What is the OECD FSE database?



Data on fisheries support = subsidies +

40 countries to date: OECD + other key fishing nations

The nature of policies: what is being supported/ paid for by the sector?

Amounts spent or collected by the government with each policy, each year

Key characteristics of those policies

What does the FSE database cover?

1. **Public support policies targeting the fisheries sector**, including:

- Direct payments to individuals and companies in the fishing sector
- Public financing of services or investment in infrastructure that benefit fisheries
- Tax concessions (i.e. tax reductions or exemptions)
- Concessional finance, sometimes also referred to as ‘below-market finance’

2. **Policies resulting in payments by the fisheries sector** to public finances

- Taxes and fees on fishing volume/profits/activities
- Payments for access to fish resources and fishing infrastructure.

How does the FSE database coverage compare to other sources?

More restrictive definition of 'subsidies'

WTO : Subsidies = fisheries-specific direct support to individuals and companies

OECD: Fisheries Support (Fisheries Support Estimate database) = subsidies + specific support to the sector (infrastructure & services)

IMF: Implicit subsidies

Sumaila et al. : implicit + Ocean (e.g. incl. MPA financing)

Less restrictive definition of 'subsidies'

How is policy data classified in the FSE database?

SUPPORT TO THE FISHERIES SECTOR:	
S01	Support to vessel construction and purchase
S02	Support to vessel modernisation and purchase of gear
S03	Support to fuel consumption
S04	Support for access to infrastructure
S05	Support to infrastructure construction and modernisation
S06	Support for access to other countries' waters
S07	Support to fisher income
S08	Preferential insurance for fishers
S09	Buyback of vessel or licence
S10	Support for education and training
S11	Support for environmental maintenance
S12	Support for marketing and promotion
S13	Support to research and development other than stock assessment
S14	Stock assessment
S15	Monitoring, control and surveillance
S16	Fisheries management
S17	Other support
PAYMENTS BY THE FISHERIES SECOR	
P01	Payments for access to resources
P02	Payments for access to government-owned infrastructure
P03	Other fisheries-specific payments

DRAFT

How are policies described in the FSE database?

The FSE database uses "labels" that qualify the nature of policies – for example labels could look at

Policy attributes	**Labels and definitions** (one option must be selected in each instance)
Small-scale targeting	**Yes**: if support is only available when vessels are classified as small scale, as defined by the reporting country; the definition of which would need to be reported in the metadata **No**: otherwise
Other recipients targeting	**Yes**: if support is available to a defined set of recipients (e.g. a specific fishery; fisheries meeting specific sustainability criteria or indigenous/reconciliation groups). Definitions for these recipient groups or eligibility criteria should be reported in the metadata **No:** otherwise
Distant water exclusion	**Yes**: if support explicitly excludes distant-water operations, as defined by the reporting country; the definition of which would need to be reported in the metadata **No**: if support is available to distant-water fishing operations
Fisheries-specific	**Yes**: if support is fisheries-specific, that is, only available to the fishing sector, **OR** **No**: if support is not specific to the fisheries sector.
Emergency	**Yes**: if support is provided to mitigate the impacts of a specific unforeseen event for a fixed period of time, **OR** **No**: if support is not emergency in nature but part of a regular support policy.
Climate-related	**Yes**: if the support is given with the objective of reducing greenhouse gas emissions **No**: if the support is not motivated by climate mitigation objectives
Support mechanism	**Transfer / tax concession / preferential finance**

DRAFT

Data collection: who, how when?

- **FSE data are compiled and submitted to the OECD by national authorities**
- **FSE data are sometimes also collected by consultants** using official government documentation.
- **The request takes the form of country-specific FSE Excel questionnaires** pre-filled with historical data series.
- **The data cycle runs every two years**. With each cycle, data are collected for the two previous years.

- **New countries could be included in the FSE database if there is interest**, resource-permitting.

What does it take to report FSE data ?

Reporting data in the FSE database generally requires five main steps:

- 1. **Identifying** all the support polices that fall within the scope of the FSE;
- 2. **Quantifying** the cost of support (or value of payments) of each policy;
- 3. **Allocating** each policy to the correct FSE category (or categories);
- 4. **Describing** the key characteristics of each policy according to the set of labels provided;
- 5. **Completing** the FSE questionnaire with all the information required (including metadata).

What can be found in the FSE database?

Publicly-accessible stadardised information on support to fisheries

Detailed data on support to fisheries

Based on information submitted by national authorities, the OECD Fisheries Support Estimate (FSE) database measures, describes and classifies fisheries support policies consistently and transparently to facilitate their evaluation against defined objectives.

The FSE database covers 40 OECD Members and other large fishing nations, which, together, represented 90% of global capture fisheries production by volume in the period 2018-20.

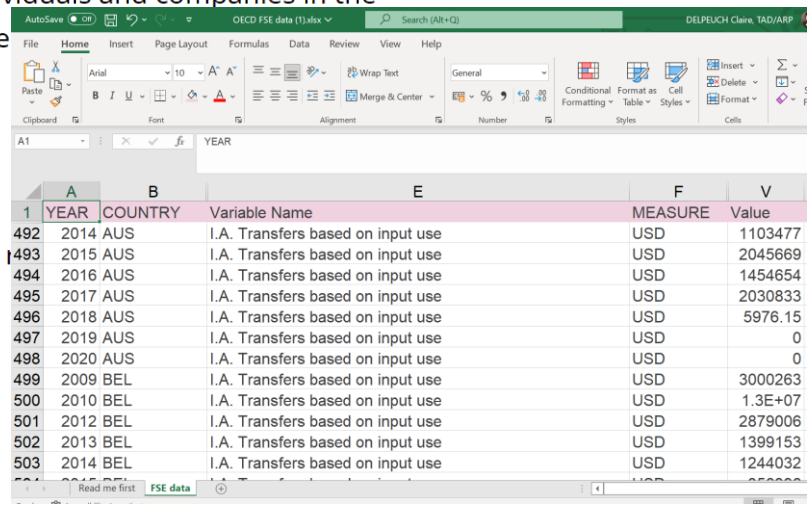
The database records support to fisheries in two main categories of policies: support for services to the sector (which comprises investment in management, research or infrastructure for example) and direct support to individuals and companies in the fisheries sector (such as fuel and vessel subsidies, income support, or payments for capacity re

Access the FSE data via the OECD data portal

Download the FSE data in Excel format

FSE data were used to produce country-level indicators on the intensity of support to fisheries and the potential impact of support on fish stock health.

Access the fisheries indicators via the OECD data portal

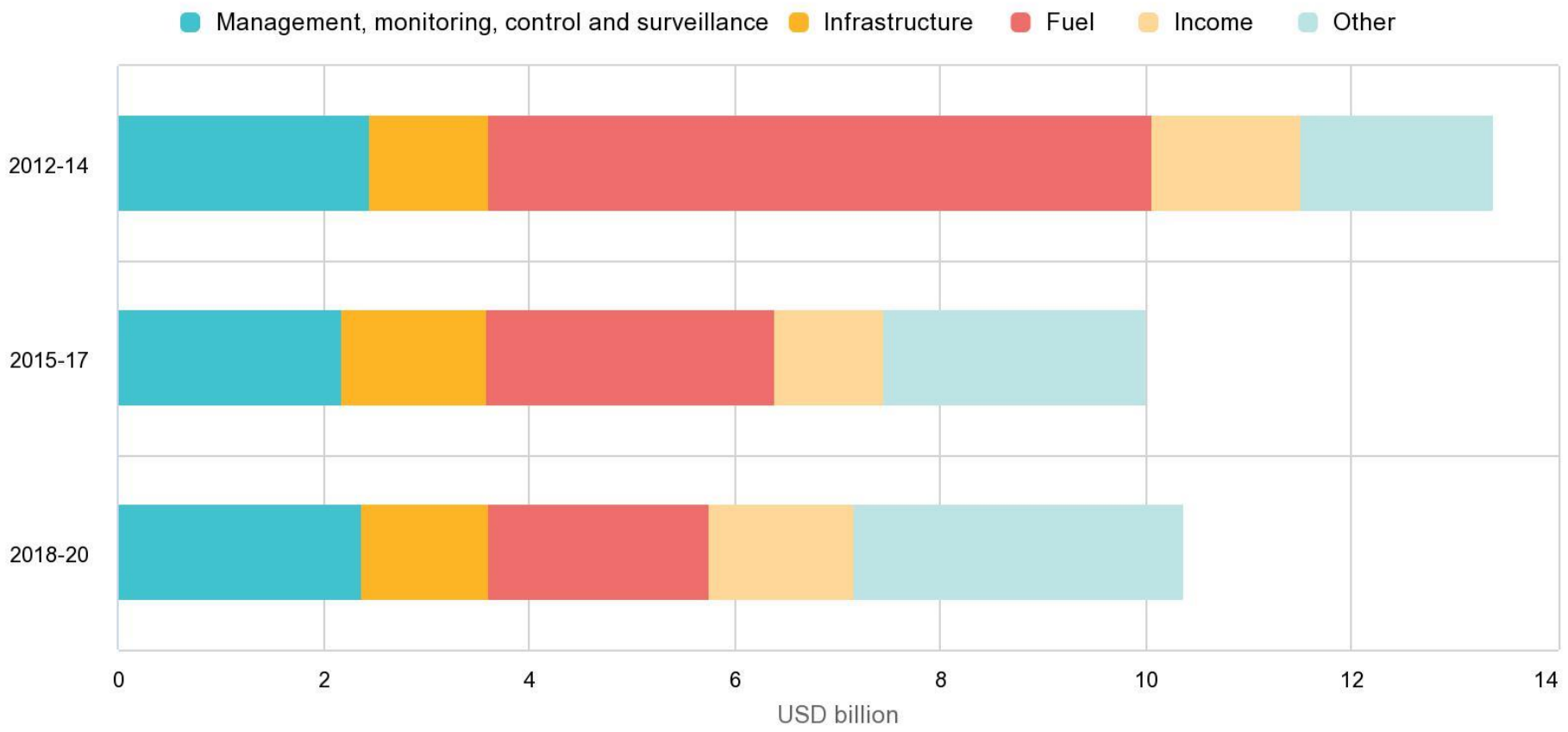


	A	B	E	F	V
1	YEAR	COUNTRY	Variable Name	MEASURE	Value
492	2014	AUS	I.A. Transfers based on input use	USD	1103477
493	2015	AUS	I.A. Transfers based on input use	USD	2045669
494	2016	AUS	I.A. Transfers based on input use	USD	1454654
495	2017	AUS	I.A. Transfers based on input use	USD	2030833
496	2018	AUS	I.A. Transfers based on input use	USD	5976.15
497	2019	AUS	I.A. Transfers based on input use	USD	0
498	2020	AUS	I.A. Transfers based on input use	USD	0
499	2009	BEL	I.A. Transfers based on input use	USD	3000263
500	2010	BEL	I.A. Transfers based on input use	USD	1.3E+07
501	2012	BEL	I.A. Transfers based on input use	USD	2879006
502	2013	BEL	I.A. Transfers based on input use	USD	1399153
503	2014	BEL	I.A. Transfers based on input use	USD	1244032

Access all our data from the OECD Fisheries and Aquaculture website

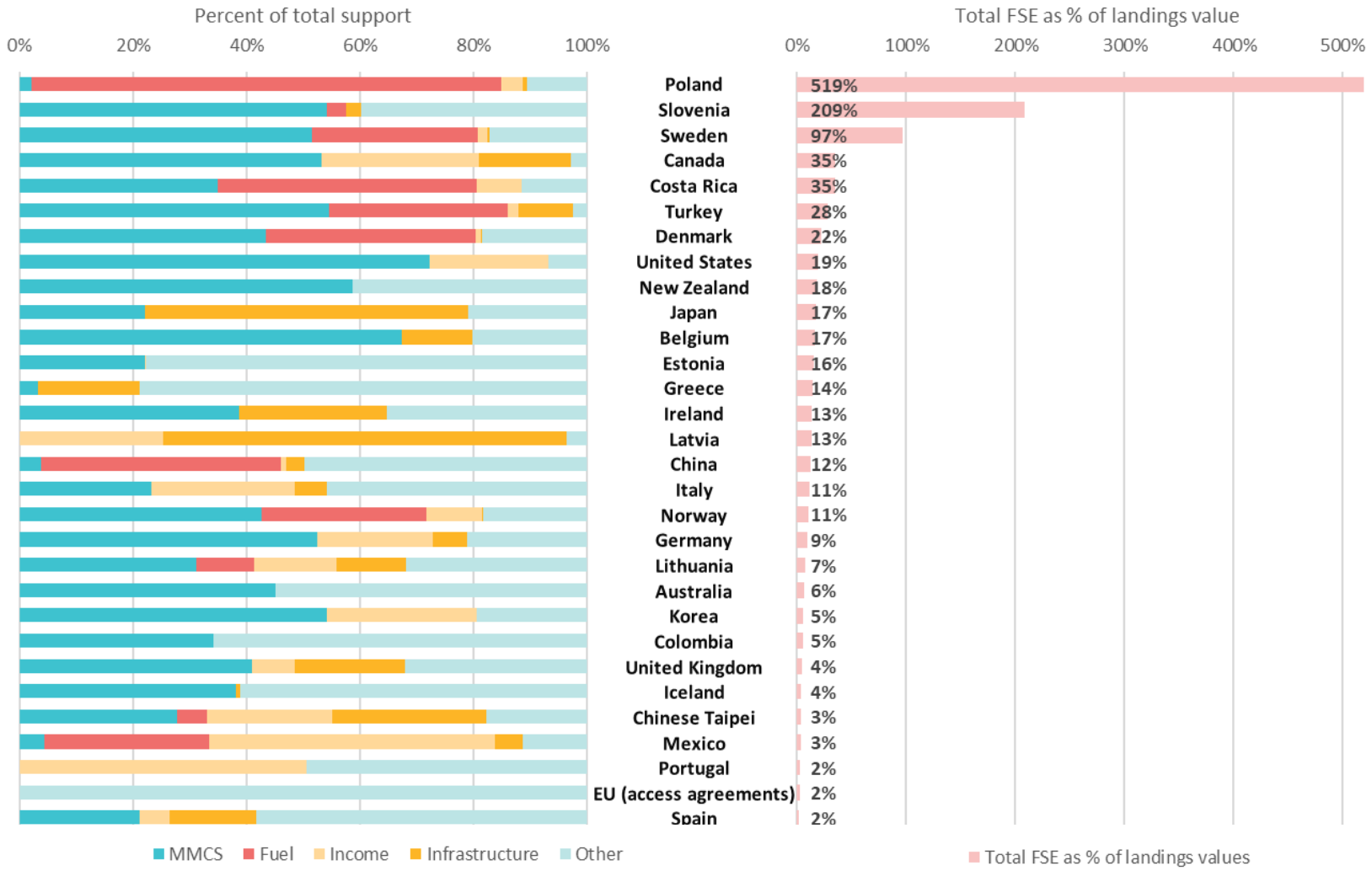
Aggregate information on how governments are supporting fisheries

Figure 3.2 Support policy mix in recent years, all countries and economies in the FSE database, 2012-20



Source: OECD Review of fisheries 2022, Fisheries Support Estimate (FSE), http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE.

Country-level information on how and how much different countries are supporting fisheries?



Source: Fisheries Support Estimate (FSE), http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE.

Country-level policy information and data visualisation tools

Compare your country
Review of Fisheries 2022

Denmark

Introduction

Globally, fish are an important source of nutritious food a
security and in the local economy of the many coastal c
biodiversity and play an important role in the delivery of
climate regulation, food provision and nutrient cycling.

The 2022 edition of the *OECD Review of Fisheries* bring
fisheries management, and support to fisheries and inve
sustainable and resilient fisheries that can provide jobs,
report covers 40 countries and economies, which togeth
volume over 2018-20: 30 OECD countries and 10 of the
(Argentina, Brazil, the People's Republic of China [herei
the Philippines, Chinese Taipei and Viet Nam).

**These country notes describe in brief each country'
fisheries policies**. They are intended to inform policy d
adopted goals and targets with respect to sustainable fi

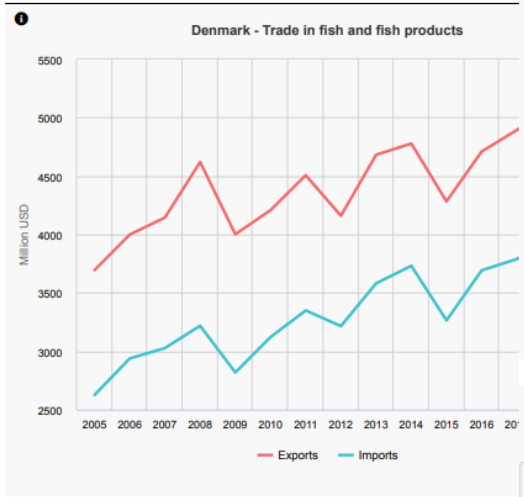
Overview of the fisheries sector

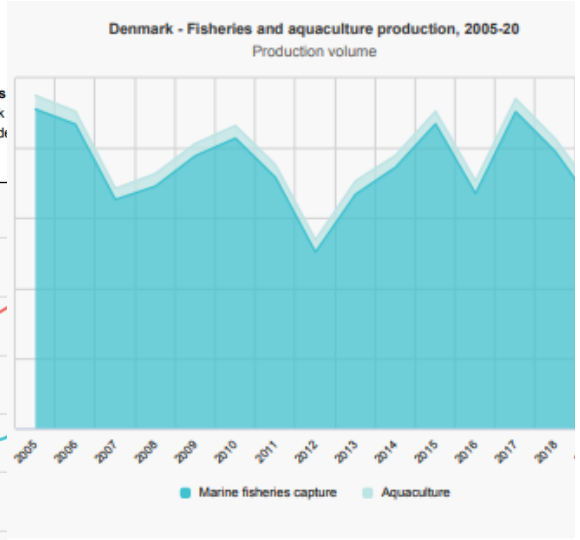
Fisheries production

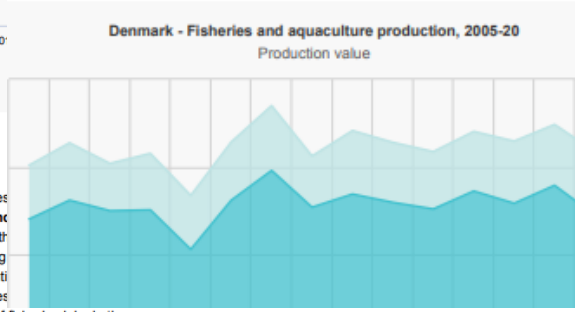
In 2020, the 40 countries and economies covered by the
captured about **58 million tonnes of fish** in marine wat
2018. Their landings were worth around **USD 83 billion**

Fish trade

Fish is one of the most traded food commodities. In 2020, **exports of fish products
118 billion** in the countries and economies covered in this report, down from a peak
2018, mainly due to the impact of the COVID-19 pandemic. Fish trade figures includ
and farmed fish, as trade data do not distinguish between the two.







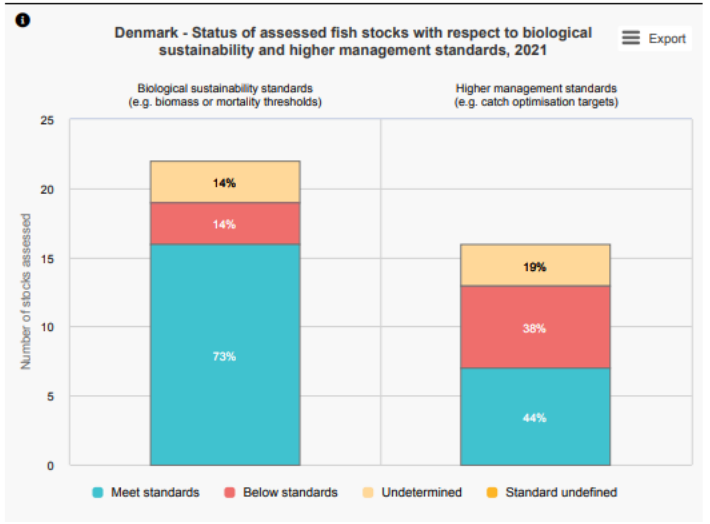
Employment

Employment in fisheries has been relatively stable in recent years in the 40 countries
covered by the *OECD Review of Fisheries 2022*, fluctuating **between 25 million and
since the mid-2000s. Employment in aquaculture has also been relatively stable in th
fluctuating **between 16 and 17 million** jobs. In addition, in 2020, the fish processing
about 619 thousand people. However, this number should be interpreted with cauti
underestimated, due to a lack of reporting from several countries. In OECD countries

Fish stock health

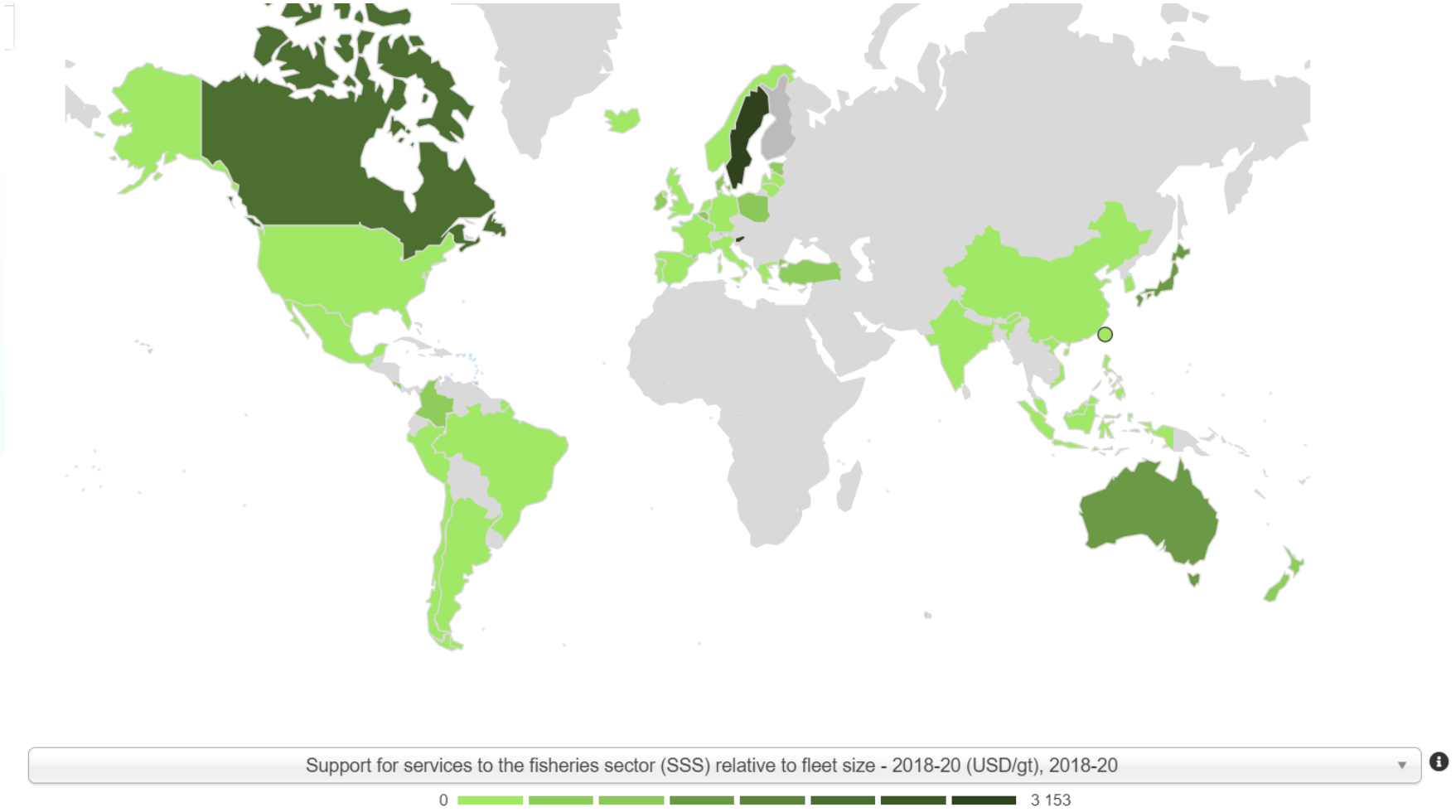
The *OECD Review of Fisheries 2022* analyses a unique data set of the status of 1 456 individual fish stocks assessed by 32 OECD countries and emerging economies (which together accounted for 45% of global catches by volume in 2021). **On average, countries and economies in the data set assessed 57 stocks**, but actual numbers of stocks assessed vary from zero to several hundreds. There are many reasons why countries and economies assess different numbers of stocks, including the number of stocks exploited and institutional capacity, which depends on the resources devoted to conducting assessments. Also, sometimes it may not be practical or even possible to conduct stock assessments where a large number of species are exploited in the same area, such as tropical reef fisheries.

The data show that **64% of the stocks assessed are in good health, 18% fall below sustainability standards and another 18% have an undetermined status** as assessments were inconclusive. Further, the data tell us that **just under half of the stocks that are in good health, that is, 30% of assessed stocks, also meet higher management standards sometimes set by fisheries managers for optimising productivity** (i.e. these stocks are abundant enough to allow the volume or value of catch to be maximised under sustainability constraints). Natural variation in stock health, or the impacts of exogenous factors not linked to fishing, such as climate change, can have significant impacts on the health of stocks and lead to unexpected declines (or increases) irrespective of management regimes.



Access country profiles [on the OECD Fisheries and Aquaculture website]

Country-level policy information and data visualisation tools



View the Review of Fisheries policy indicators with the compare your country visualisation tool

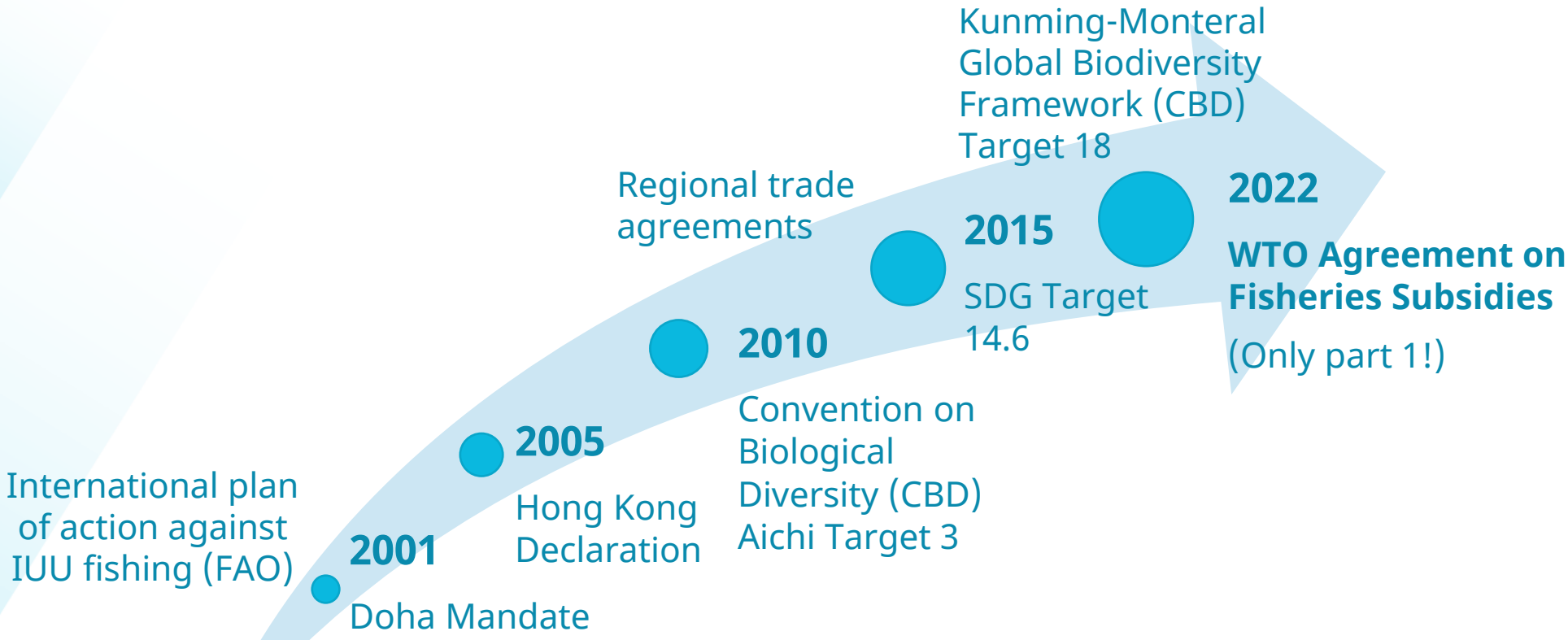
Suggested questions for the working group

Based on your country's policies presented yesterday?

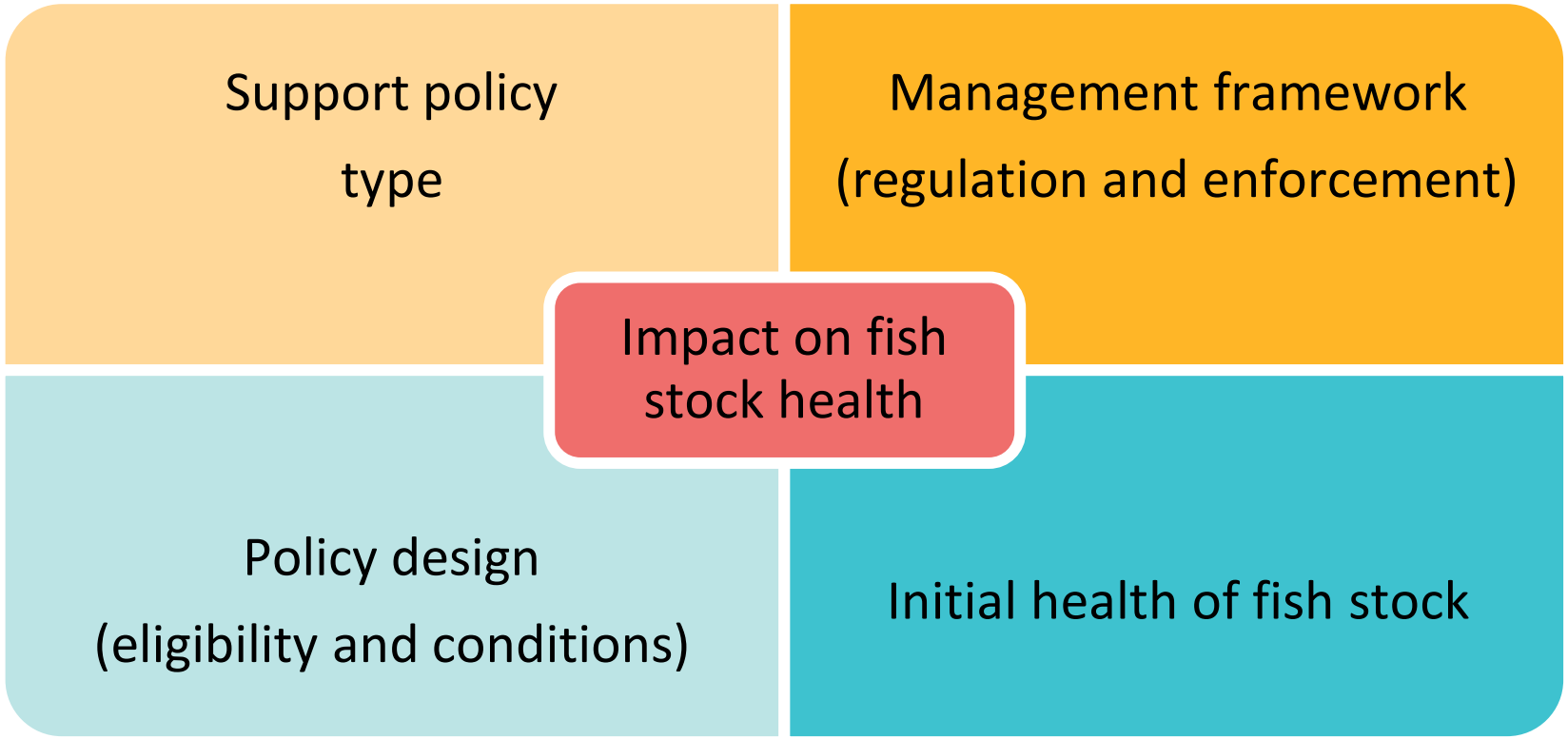
- Where do they fit in the FSE framework?
- Are there policies that do not fit anywhere in the framework?
- Are the labels capturing the main characteristics of your policies?
- Do you see any gaps?
- Any other issues?

Avoiding unintended impacts of support policies on fish stock health

A long-standing shared objective

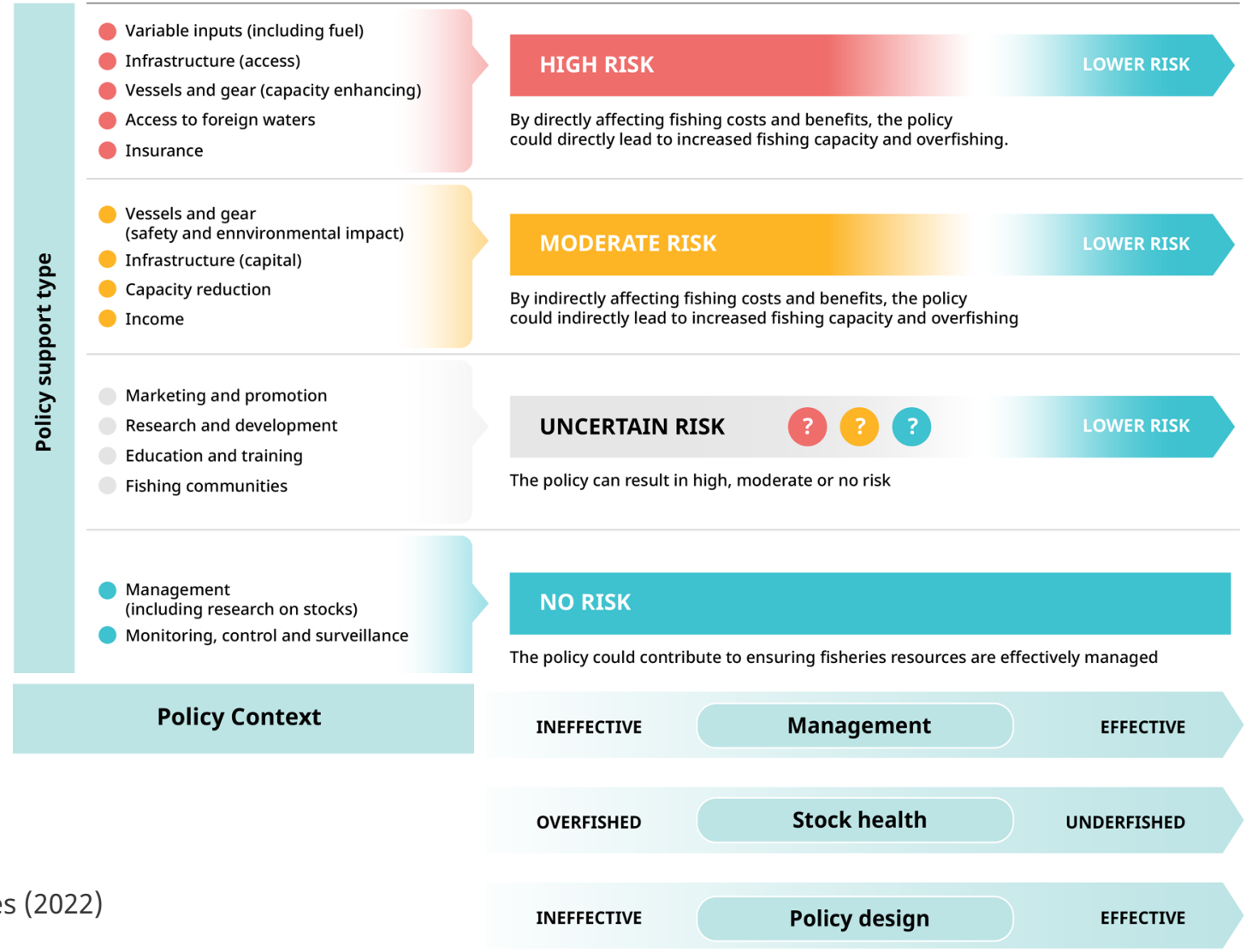


Where is reform needed?
Key factors in fisheries support sustainability impact



Source: OECD Review of fisheries (2022); Martini and Innes (2018)

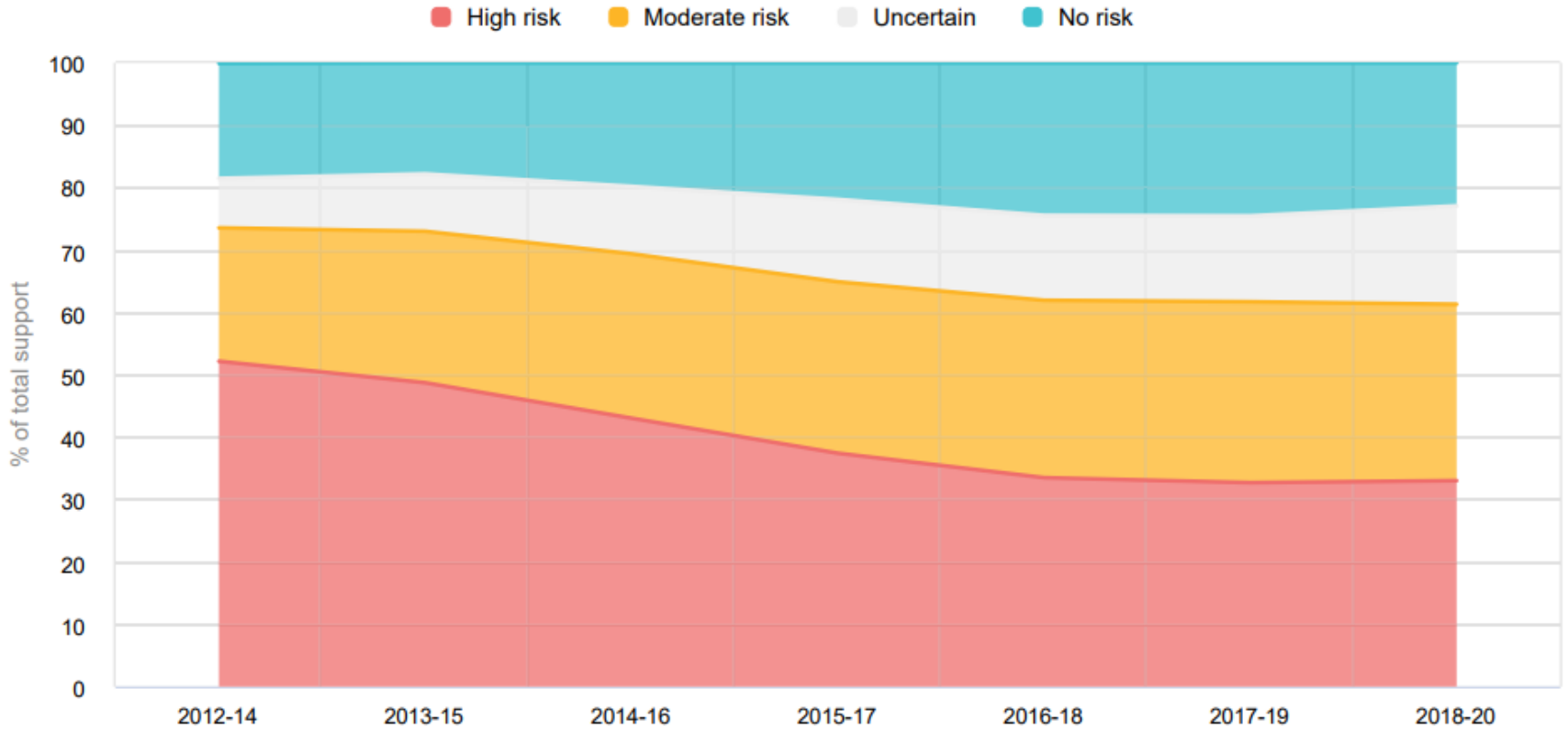
A framework to assess the potential sustainability impact of support policies



Source: OECD Review of fisheries (2022)

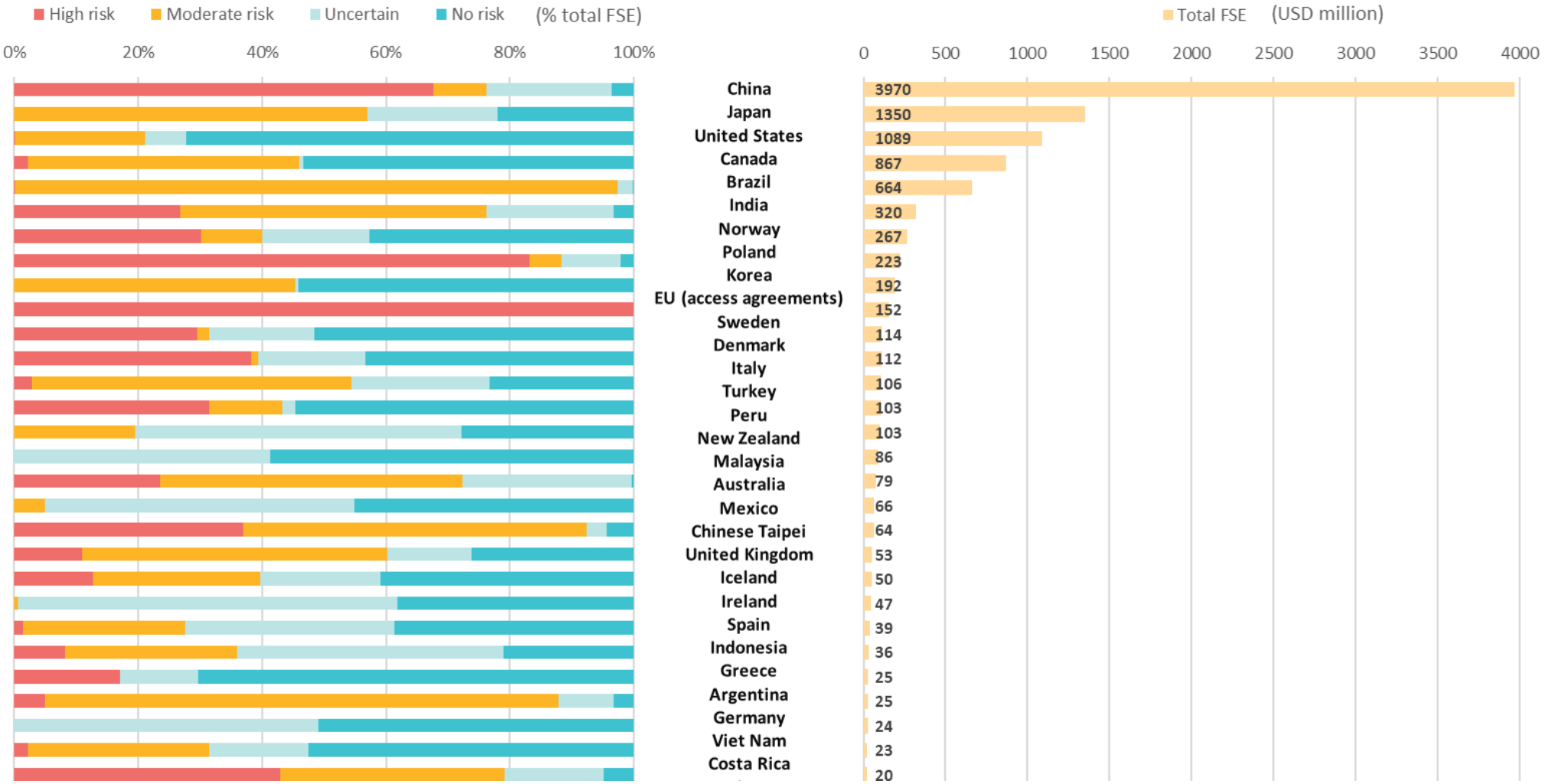
How has the risk of encouraging overcapacity and overfishing with support evolved over time?

The fisheries support policy mix by the risk of encouraging unsustainable fishing in the absence of effective management



Source: OECD Review of fisheries 2022, Fisheries Support Estimate (FSE), http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE.

How has the risk of encouraging overcapacity and overfishing with support evolved across countries?



Source: Fisheries Support Estimate (FSE), Top 30 by 'total FSE), http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE.

Suggested questions for the working groups

Based on your assessment of support policies in your country and the FSE impact matrix:

- Is the FSE impact matrix helpful to support policy formulation ?
- Do you agree with the risk levels attributed to different support categories?
- Do you have the information on the mitigating factors for high-risk policies?
    - Are the target stocks captured by supported fisheries healthy?
    - Are the target stocks captured by supported fisheries well managed?
    - Is the support only available to well managed/healthy fisheries ?
- Do you identify any lower risk policies that could replace the high-risk policies?

We are looking forward to continuing the dialogue and cooperation

Please find our reports & data at
https://oe.cd/fish

We invite you to stay in touch
by Signing up to
our newsletter

And following us on Twitter
@OECDagriculture