


December 2013

	منظمة الأغذية والزراعة للأمم المتحدة	联合国 粮食及 农业组织	Food and Agriculture Organization of the United Nations	Organisation des Nations Unies pour l'alimentation et l'agriculture	Продовольственная и сельскохозяйственная организация Объединенных Наций	Organización de las Naciones Unidas para la Alimentación y la Agricultura
---	--	--------------------	---	---	---	--

COMMITTEE ON FISHERIES

SUB-COMMITTEE ON FISH TRADE

Fourteenth Session

Bergen, Norway, 24–28 February 2014

RECENT DEVELOPMENTS IN FISH TRADE

Executive Summary

The purpose of this paper is to inform the Sub-Committee of major facts and developments regarding international trade in fish and fishery products that have occurred since the thirteenth session in February 2012. The document contains a brief overview of world fishery production, consumption, trade and price development. It also includes a summary of the current trade situation of major fishery commodities and issues of relevance throughout the value-chain. The activities of FAO and other international organizations in the field of world fish trade are described. The document also addresses some emerging issues perceived to be of importance for the various stakeholders in the value-chain for internationally traded fish and fishery products, in particular those related to developing countries.

Suggested action by the Sub-Committee:

- Share information on trade developments and relevant experience;
- Provide guidance for future FAO work in the area of international trade in fishery products, particularly with regard to enabling developing countries and small-scale operators to participate more effectively in fish trade; and
- Comment upon FAO's dialogue with stakeholders throughout the value-chain and on the collaboration between FAO and relevant organizations with respect to fisheries trade issues.

INTRODUCTION

1. Driven by further expansion of aquaculture, global fishery production¹ (capture and aquaculture) is expected to set a new record in 2013, at 160 million tonnes. This rise will lead to a 2.7 percent growth in per capita apparent fish consumption, reflecting the increased availability of farmed products, which are in the process of overtaking capture fisheries as the main source of fish food supply, but also the growing volumes of wild species going to direct human consumption.

2. With sustained growth in fish production and improved distribution channels, world fish trade has continued to increase, in both values and quantities, even if at a slower growth rate with respect to that experienced in 2010–2011/early 2012. Preliminary data for 2013 indicate exports to set a new record, reaching USD 132 billion. The following sections provide a review of the most relevant events since the thirteenth session of the Sub-Committee on Fish Trade (COFI:FT).

PRODUCTION

3. Total world fishery production showed new growth in the 2010–2011 period, rising from 148 million tonnes in 2010 to 156 million tonnes in 2011. Preliminary data for 2012 indicate only a slight increase, to 157 million tonnes, thanks to the rise in aquaculture production overcoming the three percent decline in capture fisheries. Estimates for 2013 point to a moderate growth (two percent) with respect to 2012, reaching 160 million tonnes. In the last biennium, China confirmed its role as the principal producer, with 54 million tonnes produced in 2011, of which about 39 million tonnes was from aquaculture. Preliminary data for 2012 indicate a further increase of Chinese production to 57 million tonnes. Developing countries continued to be the predominant producers, with a share of 82 percent of world fishery and 94 percent of world aquaculture production (2011). Eighty-eight percent of the world's aquaculture production took place in Asia.

4. Compared with production of a decade ago, the 2012 figure represents an expansion of more than 29 million tonnes. This is entirely due to increases in aquaculture production, which has grown at an average of 6.1 percent per year in the period 2002–2012. Preliminary data for 2012 indicate total aquaculture production at 66 million tonnes and projections for 2013 point towards a growth reaching about 70 million tonnes or 44 percent of total fishery output. Notwithstanding this sustained increase, the average annual growth rate of aquaculture production has decelerated during the last two years, also as a result of reduced production, in particular of shrimp, caused by disease problems.

5. Subsequent to the five percent increase experienced in 2011 (reaching 93.5 million tonnes), capture fisheries declined by more than three percent in 2012 because of lower landing of anchoveta in South America. These reduced catches also triggered a decline in fishmeal and fish oil production with subsequent strong price increases. Estimates for 2013 point to a moderate decline of capture fisheries to 90.2 million tonnes, in line with the patterns seen over the last two decades, with total output oscillating within a range of 85 and 95 million tonnes.

6. The above trends are projected to continue in the next decade. According to the results of the FAO fish model, included in the OECD-FAO Agricultural Outlook 2013–2022 publication, world fisheries production is expected to reach about 181 million tonnes by 2022, representing an 18 percent growth compared with the 2010–2012 base period used by the model. Most of the production gains will come from aquaculture, which is projected to increase by 35 percent over the Outlook period, while capture fisheries should grow by about five percent, mainly because of the recovery of some stocks.

CONSUMPTION

7. World apparent per capita fish consumption has risen steadily over the past decades, reaching an average of 17.3 kg during the 2001–2010² period. Figures for 2011 and 2012 show new increases to

¹ Statistics on fishery production, trade and consumption quoted in the entire document exclude whales, seals, other aquatic mammals and aquatic plants.

² 2010 represents the latest year available for exhaustive FAO fish apparent consumption statistics.

18.9 kg and 19.2 kg, respectively. Estimates for 2013 point towards new advances to reach 19.7 kg, with major growth in emerging economies. With capture fisheries quite stable, its contribution towards per capita consumption is diminishing. In 2013, farmed fishery products are estimated to have reached 49 percent of the total fish supply for human consumption.

8. Fish and fishery products play a crucial role in nutrition, being a source of nutrients of fundamental importance not readily found in other foods. Furthermore, fish accounts for about 17 percent of the world population's intake of animal protein and 6.5 percent of all protein consumed. Globally, fish provides about 3 billion people with almost 20 percent of their intake of animal protein, and 4.3 billion people with about 15 percent of such proteins. Despite the relatively lower levels of fish consumption in developing countries with respect to developed countries (17.8 kg versus 23.3 kg in 2010), the share of their animal protein intake contributed by fish is significantly higher. In 2010, this share was about 28.6 percent for least developed countries, 19.7 percent for other developing countries, 25.9 percent for Low-Income Food-Deficit Countries (LIFDCs) and only 11.6 percent for developed countries.

9. The long-term challenge for policy makers is to sustain this consumption growth, not only to maintain the present level of fish intake per capita, but ideally to increase it. In general, globalization, urbanization, trade and advances in technology and distribution channels for food have the potential to increase the availability of fish to most of the world's consumers. However, availability alone is not the only factor to boost fish consumption. It is evident that socio-economic and cultural factors also strongly influence the level of fish consumption among countries and within countries in terms of quantity and variety consumed.

TRADE

10. Fishery trade has considerably expanded during the last few decades, as the fisheries sector operates in an increasingly globalized environment. Fish can be produced in one country, processed in a second and consumed in a third. After a period of strong increase in 2011 (16 percent compared with 2010) and early 2012, international trade of fish and fishery products has continued to expand, but at a lower growth rate. In 2012, fishery exports reached USD 129.3 billion, with a modest increase over 2011 (one percent), but representing the highest level ever reported. Preliminary estimates for 2013 point to a further record at about USD 132.2 billion.

11. The sluggish growth rates experienced by trade in 2012–2013 were mainly the result of the downward pressure experienced by international prices of selected fish and fishery products for human consumption, in particular of farmed species, caused by reduced demand in many key markets. Demand was particularly uncertain in many developed countries, the main importers of fish for human consumption. Therefore, exporters were encouraged to develop new markets in a number of emerging economies still presenting healthy demand.

12. During 2011 and 2012, the proportion of world fishery production entering international trade remained fairly stable, at around 37 percent (live-weight equivalent). Notwithstanding a growing share of international fishery trade consists of farmed products, aquaculture continues to play a key role in food security. A significant portion of its production consists of low-value freshwater species, mainly destined for domestic consumption. Growing interest from local consumers has also underpinned aquaculture development in many regions in Asia and increasingly in Africa and South and Central America.

13. Despite the renewed economic instability experienced in 2012 and 2013 in many of the world's leading economies, the long-term trend for fish trade remains positive. However, the short-term outlook for 2014 is still uncertain, as the underlying positive trend in fish consumption and demand in most developing countries has to be balanced by feeble consumer interest in the traditional import markets of the United States of America, the European Union (Member Organization) (hereafter referred to as EU), and Japan.

14. In the period 2011–2012, developing countries confirmed their fundamental role as suppliers to world markets, with about 53 percent of the value and more than 60 percent of the quantity (live

weight) of total fishery exports. For many developing nations, fish trade represents a significant source of foreign currency earnings in addition to the sector's important role in income generation, employment, food security and nutrition. Their fishery net-export revenues (exports minus imports) reached USD 35.5 billion in 2012, higher than other agricultural commodities, such as meat, tobacco, rice and sugar. In 2012, LIFDCs accounted for eight percent of total exports in value terms, with their fishery net-exports reaching USD 5.9 billion.

15. Developed countries are the predominant importers, with 73 percent of the world imports of USD 131.8 billion (2012), a decline of two percent from the previous biennium. In quantity (live weight), their share is significantly less at 55 percent, reflecting the higher unit value of products imported by developed countries. During the last few years, developing countries have increased fishery imports to supply their processing sectors and to meet rising domestic consumption.

16. China is by far the largest exporter of fish and fishery products at USD 18.2 billion (2012), but its imports are also growing, reaching USD 7.4 billion in the same year. Since 2011, China has become the world's third largest importing country, after the United States of America and Japan. The increase in China's imports is partly a result of outsourcing. Chinese processors import raw material from all major regions, including South and North America and Europe, for re-processing and re-export. It also reflects China's growing domestic consumption of species not available from local sources. Forecasts for China's fish exports in 2013 show further growth to USD 19.8 billion.

17. Norway, the second major exporter, has a diverse product mix, ranging from farmed salmonids to small pelagic species and traditional whitefish products. The comeback of the Arctic cod has also allowed the country to expand its markets for fresh cod products. Thailand and Viet Nam are the third and fourth largest world exporters. In 2013, Thailand experienced a decline of its exports (about 12 percent), resulting from reduced production of farmed shrimp, caused by disease problems. In both countries, the processing industry contributes significantly to the domestic economy through job creation and trade. Thailand is a processing centre of excellence largely dependent on imported raw material. In contrast, Viet Nam has a growing domestic resource base and imports only limited, albeit growing, volumes of raw material.

18. The EU is, by far, the largest single market for imported fish and fishery products. In 2012, imports (EU-27) reached USD 47.1 billion, down four percent from 2011, and representing 36 percent of total world imports. However, official statistics also include trade among EU partners. If intraregional trade is excluded, the EU fishery imports were worth USD 24.9 billion in 2012. This still makes the EU the largest market in the world, with about 26 percent of world imports. Forecasts for 2013 show a six percent growth to about USD 50 billion (USD 26 billion if intra-EU trade is excluded). The EU's dependency on imports for fish consumption is growing. This is a result of the positive underlying trend in consumption, but is also evidence of the constraints within the EU on further expansion of supply.

19. The United States of America and Japan are the largest single importers of fish and fishery products and, like the EU, are highly dependent on imports for fish consumption (at about 60 percent and 54 percent, respectively, of total fish supply). Japan, traditionally the largest single importer of fish, was overtaken by the United States of America in 2011, but again became the main importer in 2012 at USD 18.0 billion. In 2013 its imports significantly declined by about 15 percent, also owing to a weaker currency, which made imports more expensive. In 2012, the fishery imports of the United States of America reached USD 17.6 billion and preliminary estimates for 2013 indicate a slight decline to USD 17.5 billion.

20. In addition to the three major importing markets, a number of emerging countries have become of growing importance to the world's exporters. Prominent among these markets are Brazil, Mexico, Russia, Egypt, Asia and the Middle East in general. In Asia, Africa and South and Central America, regional flows continue to be of importance, although, in many instances, this trade is not adequately reflected in official statistics. Improved domestic distribution systems for fish and fishery products as well as growing aquaculture production have played a role in increasing regional trade. Domestic markets, in particular in Asia, but also in Central and South America, have remained strong during the 2011–2012 period, providing welcome outlets for domestic and regional producers. Eastern

and central Europe have also seen growing imports in response to increasing purchasing power among consumers.

PRICES

21. Fish prices, as for other products, are influenced by demand and supply factors. At the same time, the very heterogeneous nature of the fishery sector, with hundreds of species and thousands of products entering international trade, makes it challenging to estimate price developments for the sector as a whole. During 2012–2013, FAO continued its work on the construction of a fish price index to better illustrate both relative and absolute price movements. The index is being developed in cooperation with the University of Stavanger and with data support from the Norwegian Seafood Council. The index is regularly published in the biannual FAO Food Outlook³ as well as in the GLOBEFISH Highlights quarterly publications.

22. With a base year of 2002–2004 = 100, the aggregate FAO Fish Price Index increased markedly from 90 in early 2002 to peak at 157 in March 2011, although with strong within-year oscillation. After that high point, the index declined slightly, but overall remained high at above 140 in 2012–2013. In addition to the aggregate index, separate indices have been developed for the most important commodities, as well as for wild and farmed categories of species.

23. One interesting aspect highlighted by the FAO Fish Price Index is the divergence in price trends for capture and aquaculture products. The main causes for this appear to be on the supply side and in the respective cost structures: higher energy prices on fishing vessel operations than on farmed ones and supply lower than demand for certain species. Aquaculture has benefited to a greater degree from cost reductions through productivity gains and economies of scale, but it has recently been experiencing higher costs, in particular for feeds, which affected production of carnivorous species in particular. Aquaculture production also responds to price changes with a time lag, given the stocking and production cycle for most species. Until late 2012, prices for species from capture fisheries increased more than those for farmed species, reaching 164 versus 123 in December 2012. However, during 2013, the gap narrowed, reaching 144 versus 140 in July 2013.

MAIN COMMODITIES

24. Shrimp continued to be the largest single commodity in value terms, accounting for 15 percent of the total value of internationally traded fishery products. Shrimp is mainly produced in developing countries, and much of this production finds its way into international trade. However, growing demand in these countries, as economic conditions improve, is leading to lower exports and increased domestic consumption.

25. Farmed shrimp production volumes decreased in 2012 and during the first half of 2013, mainly as a result of disease problems. This reduced supply, associated with poor production forecasts for the rest of 2013, has pushed shrimp prices higher worldwide. Buyers were influencing market prices with sustained demand, as for example in the United States of America and in China. In contrast, several European countries and Japan have experienced lower imports. The Japanese market, totally dependent on imported supplies of shrimp, is also suffering because of a weaker yen and increased landing costs.

26. Salmon's share in world trade has increased strongly over the last decades to the present 14 percent thanks to the expansion of salmon and trout aquaculture production in northern Europe and in North and South America. Prices of farmed salmon fell drastically in the second half of 2011 and took several months before stabilizing. The recovery began in late 2012 and since then, the salmon market has witnessed a positive price trajectory, lifting export revenues to record levels, particularly for Norwegian producers supplying EU markets. In third quarter of 2013, this price trend has been reversed as a result of some evidence of weakening demand, as higher costs of raw material filtered down the value chain. However, it appears that the market balance should be sufficiently tight to halt

³ <http://www.fao.org/GIEWS/ENGLISH/fo/index.htm>

the decline. In Chile, the second major producer and exporter, the salmon industry is undergoing an important transformation process that seeks to overcome the current financial crisis and to address higher production costs resulting from stricter production regulations.

27. Groundfish species, such as cod, hake, saithe and pollock, continue to make up about 10 percent of world fish exports. The market for groundfish products seems widely diversified and is behaving quite differently these days from the norms of the past. Overall groundfish supply was higher in 2012 and the first half of 2013, thanks to the recovery of a number of stocks. However, there were differences according to species, with, for example, abundant supply of Arctic cod and a shortage of saithe and haddock. In general, prices of groundfish have firmed in 2011–13. Cod remained the most expensive groundfish, experiencing increasing prices even in a situation of good supply. Yet, owing to ample supply, cod prices are expected to decline during 2014, at least for the more traditional products, such as frozen fillets and blocks, and clipfish and stockfish.

28. In the past, world whitefish markets were dominated by traditional groundfish species, but with the advent of aquaculture this has changed remarkably. Farmed whitefish species, in particular less expensive alternatives such as tilapia and pangasius, have gained inroads into traditional groundfish markets and are permitting the sector to expand substantially and to reach new consumer groups. Pangasius is now exported to the EU, United States of America, Japan, Russia, Egypt, the Middle East and South America as well as Africa. However, pangasius supply in 2013 is likely to be smaller than 2012, because of reduced output in the main export country, Viet Nam. Steady demand from across the globe is expected to drive production development of pangasius in other producing countries, particularly in Asia.

29. Tilapia continues to be popular in the United States of America, with Asian (frozen) and Central American (fresh) countries as main suppliers. Demand in Europe for this species continues to be limited and active marketing and promotional activities are needed to gain visibility in this market. Tilapia production is expanding in Asia, South America and Africa with new supply targeting domestic and regional consumers rather than international markets. It is also important to mention that African producers are now seeing tilapia's potential for domestic consumption as well as for export.

30. The share of tuna in total fish exports is around nine percent. With some variations, overall tuna landings have been lower in 2013 than 2012, with prices reaching high levels. Japan, the largest sashimi tuna market, has become less active with lower imports in the January-June 2013 period. Demand for fresh/chilled sashimi remained high in the United States of America, which is now the second largest market for non-canned tuna products. The canned tuna market fared better, with improved imports by the United States of America and the EU and with prices remaining on a high plateau. Canned tuna demand has also improved in non-conventional markets, in particular in Asia.

31. The share of cephalopods in world fish trade is around three percent. During 2013, main markets, in particular Japan and the EU, remained strong, in spite of difficult economic situations and the high prices of these species. In January-June 2013, octopus supplies were more abundant with respect to 2012, particularly from Morocco. Squid production also improved somewhat in the same period, while cuttlefish supplies were a little tighter. Cephalopod prices remained relatively high and are expected to continue. There is growing interest in jumbo flying squid (*Dosidicus gigas*) in South America, with exports from Peru to over 50 countries.

32. The production of fishmeal has declined gradually since 2005, while overall demand continued to grow, pushing prices to historic highs. This rising trend for fishmeal prices continued through the second quarter of 2013, with an overall increase of approximately 43 percent between mid-2008 and mid-2013. As soymeal prices remained relatively stable during the same period, the growing price differential provides incentives for terrestrial farmers to substitute fishmeal with less expensive feed alternatives.

33. Fish oil production is also decreasing, mainly as a result of lower production in Latin America, and more stringent quotas on raw materials, contributing to price pressure and increased volatility. Fish oil prices continued to rise steadily, reaching new highs in mid-2013. Growing demand for aquaculture products is increasing the requirement for fish oil and, hence, its price, as fish oil is an

important ingredient in feeds for selected carnivorous fish species. Demand for fish oil as a human nutritional supplement also continues to grow.

VALUE-CHAIN DEVELOPMENTS

34. A value-chain can contain numerous stakeholders, depending on the number of handling, processing and distribution links between the primary producer and the consumer. The stakeholders are affected by several factors of varying degrees depending on their position in the value-chain, their contractual relationship and the relative strength of negotiation in their relationship with suppliers and clients. Some issues are of a transitory nature with an immediate market effect, while others are of a long-term nature in which the real impact may only be hypothesised.

35. From 2009 to 2012, FAO conducted a comprehensive value chain analysis of international fish trade with an impact assessment for the small-scale fisheries and aquaculture sectors. The project, funded by NORAD, was entitled “Value chain dynamics, the small-scale sector and food security; policy recommendations for international fish trade”⁴. The project involved case studies focusing on nine developing countries: Bangladesh, Cambodia, Ghana, Honduras, Kenya, the Maldives, Peru, Thailand and Uganda. Five developed countries were also included in the project: Canada, Iceland, Japan, Norway and Spain.

36. Relative to other actors in the value-chain, case studies concluded that the fishers or fish farmers were receiving the least distributional benefits for their products, with the processors and retailers receiving the most, as a result of their more concentrated market structure and stronger buying power. Most fish suppliers in developing countries were found to be supplying raw material to developed countries, and thus were receiving limited distributional benefits from their valuable natural resources.

37. The case studies recognized that increased support for the primary nodes of the value chain from governments, non-governmental organizations (NGOs) and international bodies was needed. It was proposed that this support should be targeted into four main areas, including technical training, improvement of infrastructure, access to financing, and research and development.

ISSUES OF RELEVANCE TO INTERNATIONAL TRADE

38. Some of the major issues concerning international trade in fishery products in the past biennium and that continue to impact international trade, are⁵:

- The relationship between fisheries management design, allocation of rights and the economic sustainability of the sector;
- The role of the small-scale sector in fish production and trade;
- The impact on the domestic fisheries sector from a surge in imports of farmed products;
- The significant increase of ecolabels and their possible effect on market access for developing countries⁶;
- The requirement for new traceability systems;
- The economic crises and the risk of increased import barriers and tariffs;
- The volatility of commodity prices in general and the impact on producers as well as on consumers;
- Prices and distribution of margins and benefits throughout the fisheries value-chain;
- The need for competitiveness of fish and fishery products versus other food products;
- The more stringent rules for quality and safety of food products, including for imported products, in several countries; and
- Perceived and real risks and benefits from fish consumption.

⁴ <http://www.fao.org/valuechaininmallscalefisheries/en/>

⁵ Please see document COFI:FT/XIV/2014/8 for information on market access issues related to quality and safety.

⁶ Please see document COFI:FT/XIV/2014/6 for information on the work of FAO on ecolabels.

39. Exports of developing countries have significantly increased in the last few decades also thanks to the lowering of tariffs, in particular for non-value added products. This trend follows the expanding membership of the World Trade Organization (WTO), the entry into force of a number of bilateral trade agreements and rising disposable incomes in emerging economies. However, notwithstanding these positive numbers, there are several factors that have an impact on the performance of developing countries in accessing international markets.

40. These issues include problems linked to the internal structures in some countries. Despite technical advances and innovations, many countries, especially those with less-developed economies, still lack adequate infrastructure and service, which can affect the quality of fishery products, contributing to their loss or difficulty in marketing. Some developing countries might have inadequate regulatory framework and institutional capacity for sustainable governance of the fishery sector. Sustainable resource management practices are essential for sustainable international trade, progress in reduction of discards at landings and of waste along the full value chain. Developing countries can also be excluded from regional development policies because of a lack of institutional capacity.

41. In exporting, developing countries might be faced with tariff and non-tariff barriers to trade. The effect of non-tariff barriers (NTBs) on trade and economic welfare is difficult to evaluate. NTBs may affect trade through the application of required product standards, control on sanitary and phytosanitary measures, procedures for import licensing and rules of origin, conformity assessment and others. Trade in developing countries can also be influenced by the specific ways in which customs classifications, valuation and clearance procedures are handled, including lengthy or duplicative certification procedures. High customs fees may also negatively affect trade.

42. Other impacts on trade in developing countries might be linked to technical barriers to trade (TBTs), which refer to technical regulations and standards that set out specific characteristics of a product. The WTO Agreement on TBTs contains rules expressly aimed at preventing these measures from becoming unnecessary barriers, but they still exist and create difficulties for traders. These measures also include the technical procedures for confirming that products comply with the requirements stipulated in regulations and standards that apply to both domestically produced products and imports.

ACTIVITIES BY THE WTO WITH REGARD TO FISHERY PRODUCTS

43. The negotiations of the WTO Doha Development Agenda (DDA) were initiated in 2001 and carried on throughout 2010 and part of 2011, before stalling on most issues, including those related to fisheries. The two major issues of relevance to the fisheries sector in the DDA continue to be 1) fisheries subsidies, discussed in the Subgroup on fisheries subsidies negotiations within the Negotiating Group on Rules; and 2) industrialized market access negotiations, discussed in the Negotiating Group on Non-Agricultural Market Access. There has been no active work on these issues since April 2011, pending progress in other areas of the round.

44. Following the accession of China in 2001, Viet Nam in 2007 and Russia in 2012, all major fish producing, importing and exporting countries have become WTO members. There are a total of 159 WTO members at the time of drafting this paper. Membership of the organization is a pre-requisite for having access to its Dispute Settlement Mechanism.

45. Global Reviews represent another area of relevance for fisheries. They monitor the Aid for Trade initiative, with the objective to make aid for trade more operational. The fourth Global Review of July 2013 noted, inter alia, that committed aid from donor countries to Building Productive Capacity in the fisheries sector in developing countries increased from USD 308 million in 2005 to USD 425 million in 2011.

FAO COOPERATION WITH OTHER ORGANIZATIONS

46. During the biennium, FAO has enhanced its collaboration with the private sector and has continued to have an excellent relationship of cooperation with other international organizations,

including WTO, the Organisation for Economic Co-operation and Development (OECD) and the World Bank (WB), with mutual provision of technical expertise when requested.

47. The cooperation between FAO and the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) has continued on a regular basis, in part thanks to extra-budgetary funding. FAO has supported CITES through a number of activities and on legal issues⁷.

⁷ Please see document COFI:FT/XIV/2014/10 for information on the cooperation between FAO and CITES.