

Report of the

**EXPERT CONSULTATION ON INTERNATIONAL FISH TRADE AND
FOOD SECURITY**

Casablanca, Morocco, 27–30 January 2003



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PREPARATION OF THIS DOCUMENT

This document is the final report of the Expert Consultation on International Fish Trade and Food Security, which was held in Casablanca, Morocco, from 27 to 30 January 2003.

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Report of the Expert Consultation on International Fish Trade and Food Security. Casablanca, Morocco, 27 – 30 January 2003

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Abstract

The Expert Consultation on International Fish Trade and Food Security met in Casablanca, Morocco, for four days starting 27 January 2003. Nine experts from eight countries, invited in their individual capacity, attended the meeting. Mr Driss Meski, President of INFOSAMAK, was elected as Chair. Recommendations were made as follows: a) conduct a background study on the normative framework for fish trade and food security; b) organize a consultative process on the normative framework; c) prepare technical guidelines for the Code of Conduct for Responsible Fisheries (CCRF) on fish trade and food security; d) train and improve capacity of policy makers and technical personnel on international issues dealing with fish trade and food security; e) integrate the fish trade and food security issues into the proposed “FAO Technical Cooperation Project – WTO”; f) expand the FAO work on the distribution of costs and benefits in the fishing industry; g) prepare an analytical framework taking into account conflicting interests with specific illustrative case studies; h) conduct studies on the impact of fish trade on household food security; i) develop medium and long-term projections on the impact of fish trade on food security. In this respect: a) gender aspects and marginalized groups should be taken into account; b) FAO Fisheries Department should continue to seek further synergies through collaboration with other FAO departments and other competent international agencies (e.g. IFPRI and World Fish Centre, etc.); c) FAO should disseminate widely the results of the work programme, including the private sector using the FISHINFO network, which was recognized as an important tool for this purpose; and d) promote regional trade for food security.

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REPORT OF PRESENTATIONS AND DISCUSSIONS

Opening Session

1. The opening session of the Expert Consultation commenced with the welcome of participants and general comments about the theme of the Consultation made by Mr Driss Meski, INFOSAMAK's President. This was followed by the reading of the speech of Mr Tayeb Rhafes, Minister of Marine Fisheries of the Kingdom of Morocco by Mr Rhanmi Tijani, General Secretary of the Ministry of Marine Fisheries. The Minister expressed his pleasure that this important meeting was being held in the Kingdom of Morocco and stressed the importance of sustainable exploitation of fishery resources and of aquaculture potential, the increased contribution to food security, the promotion of trade and market diversification and the dynamic promotion of the label "Maroc". He also highlighted the efforts being undertaken in Morocco to improve the social conditions of the fishing communities. On behalf of the Director General of the Food and Agriculture Organization of the United Nations, Mr Amor Ben Romdhane, FAO Representative in Morocco, and Mr Abdellatif Belkouch, Managing Director of INFOSAMAK expressed their felicitations to the participants stressing the importance of the subject to be discussed and wished the meeting all success.

Election of Officers

2. Mr Driss Meski was unanimously elected by the participants to be the Chairperson of the Consultation, and both Mr John Kurien and Mr Roland Wiefels to be the rapporteurs.

Session 1: Presentation and analysis of country/regional papers from selected fish exporting developing countries

3. Eight presentations were delivered in this session:

- a) Egypt – presented by Mr Izzat Feidi
- b) Morocco – presented by Mr Hmida Atmani and followed by Mr Mohamed Naji
- c) Mauritania – presented by Mr Ba Abu Sidi
- d) Senegal – presented by Mr Ousmane Ndiaye
- e) Lake Victoria, Kenya – presented by Mr Richard Abila
- f) India – presented by Mr Jose Cyriac
- g) Thailand – presented by Ms Piusombun Somying, and
- h) Latin America – presented by Mr Roland Wiefels

4. The presentations gave a broad idea about the variety of situations regarding international fish trade and its implications in food security.

5. The presentations revealed that, despite the demographic growth occurring in all countries, the average yearly per capita supply of seafood also increased as a result of different causes such as, increased catches, aquaculture and imports.

6. After being a food exporting country until 1970, Egypt has become a net importer of fishery products, mainly low value species (sardines, mackerels, etc.). There is a strong local tendency in the country for rapidly increasing aquaculture production to increase local fish supplies and to reduce imports. However, it seems inevitable that imports of low value fish species will continue to be an important source of supply to cater to the fast growing population. It will be important for the country to increase its presently meagre export that command a high price in the international market and are beyond the average purchasing power of the local population. It is clear that, if the income of the local population increases by expanding community level aquaculture, this will help to enhance food security in the country as well as improve its balance of trade situation.

7. National fish consumption in Morocco grows slowly. It currently remains at eight kg per capita per annum. This official figure could be an underestimate. Morocco is the biggest exporter among the African and Arab countries. Its main customers are the European Union (for which Morocco is the major supplier of canned sardines) and Japan (for which Morocco is the major supplier of frozen octopus). The African market is still small (16 percent in volume and eight percent in value of total seafood exports) mainly due to

difficulties with transport, the marketing channels and insufficient capacity of customers to pay. It is important to notice that the export of each kilogram of fisheries products is equivalent in value to the import of about four kilograms of other food products. In Morocco too, it was felt that a higher average income of the population could lead to higher fish consumption.

8. A similar situation exists in Mauritania. Here exports are destined to Japan (40 percent) and to the European Union (60 percent). Only 12 percent of exports are processed products and the remaining 88 percent is exported whole frozen. The exports are highly dependent on a single species – the common octopus. This species is heavily overexploited and due to the overcapacity in both the national and foreign fleets, the stocks are highly vulnerable. Yearly per capita national consumption is calculated to be as low as 4.3 kg (net weight) in the study conducted by IMROP/ONS/FSJE in 2002. This study shows that there is a large difference with the earlier estimates and the reasons for this need to be investigated. However, there is a geographic differentiation with the urban population consuming 7.8 kg while the hinterland population practically does not eat fish, mainly due to the difficulties of transport. Actually, the domestic fish consumption is currently under study by Mauritanian institutions and the preliminary results indicate that it may be twice the national figure mentioned. However, fisheries activities, that involve 30 000 fishermen and fish workers, generate employment and incomes that constitute an important source of household food security.

9. The situation on the Kenyan side of Lake Victoria highlights the food security triad - availability of food, purchasing power, access within household. It also highlights the manner in which the environmental problems can arise from intensive fisheries development that is oriented to exports. This is particularly the case of the Nile perch for which a maximum sustainable yield of 39 200 metric tonnes/year is defined, compared to the current yearly catches of 90 000 metric tonnes. Trade and financial liberalization have also created a context where the repatriation to Kenya of the foreign currencies earned cannot be guaranteed. This foreign exchange currently stands at US\$ 52 million per year. The local taxes and licence fees amount to about US\$ 1.2 million. Another food security problem created by the Nile perch fisheries and its exports is the competition for the fish frames (carcasses left after filleting) between women processors who process it for local human consumption and the firms that reduce it to fishmeal. Due to overexploitation the Nile perch industry is very vulnerable and the fish supply to the population is at risk in the near future.

10. Overexploitation of stocks due to increased trade of fisheries products is also a problem in Senegal which exports nearly one third of its total catches. Despite a high current yearly per capita consumption (26 kg), the incentive to increase seafood exports (as the Lomé agreements or the devaluated CFA currency) could jeopardise the livelihood of the 600 000 persons involved in the national fisheries activities and also diminish local food security.

11. Being the fourth world producer of fisheries products, India has managed to increase the yearly per capita consumption of its huge population up to 7.1 kg and has also become one of the leading exporting countries in the world (US\$ 1.25 billion, representing 2.8 percent of total Indian exports). At this juncture, there is no apparent competition between local consumption and exports. The main export products are not demanded by the national population: shrimps (the average Indian consumer cannot afford it) and cephalopods (traditionally Indians do not like its taste).

12. The case of Thailand demonstrates that it is possible for a country to become the first seafood exporting country in the world while maintaining a high national consumption (32 kg per capita and per year). Taking geographic differences into account, the per capita fish consumption in inland provinces was 28.8 kg, whereas in the coastal provinces it was as high as 45.2 kg. In terms of quantities, urban consumers eat more fish than those in the rural areas. Production and domestic supplies are both increasing, and the domestic marketing system has developed rapidly providing easy access to a more consistent supply of fish. However indicative information shows a dramatic decline in stock abundance (cpue) in Thai waters over the last two decades. As a result, fish supplies have become heavily dependent on catches taken outside Thai waters. This raises serious questions about future supplies of fish to Thai consumers.

13. The same happens in Latin America, when viewed as a region. The development of the fishery industry during the last 40 years was clearly orientated to exports, but it had also permitted a substantial increase of the yearly per capita consumption from 5.4 kg in 1961 to 8.8 kg in 1999. There are of course many

differences both between and within the countries of the region. Due to the heterogeneity of situations, due to the complexity of the regional economy and to the size of the continent, there is no obvious link between fish trade and food security on a regional scale. It appears easier to eventually identify such links on specific fisheries sites. Actually, 60 percent of the regional production is concentrated in just 35 fishery poles.

Session 2: Considerations related to the political environment of fish trade and food security

14. Four presentations were delivered in this session about the following subjects:

- a) *Fish trade, food security and the human right to adequate food*, by Mr George Kent.
- b) *Fisheries, Food Security and Trade: Governance, A Key to Success* by Mr Jean François Abgrall.
- c) *Results of the World Food Summit in relation to international fish trade and food security*, by Mr Erhard Ruckes.
- d) *Considerations of the COFI Sub-Committee on Fish Trade in relation to international trade and food security*, by Ms Helga Josupeit.

15. These presentations emphasised the main concepts of food security and their relation to fish trade. When we consider that about one third of the fish produced globally is traded internationally this relationship is more dramatically highlighted.

16. Despite the observation that food flows generally towards money and not towards needs, it is clear that fish trade must be considered not only as a commodity value but also as a consumer value and that the human right to food is not mere rhetoric but points to a set of international obligations. In fact, the case of fish trade is to be illustrative of general food trade. The principle of subsidiarity was raised, meaning that the priority should be given to food security and managed on a national or local scale. Due to the great variety of situations, broad generalizations about food security should not be made on a worldwide scale, as for instance at the World Trade Organization.

17. Governments have three broad policy options to ensure food security through fishery products: (1) production for domestic consumption; (2) production trade and use its revenues for acquiring other types of food; or (3) distribution through social aid programmes. There are policy options that may be taken at the national level. These include: giving priority to industrial fisheries that are normally oriented to trade, or promoting small scale fisheries, that are generally oriented to supply the domestic market. At an international level, the question was raised about the validity of introducing technical guidelines for food security at the WTO negotiations.

18. It was recalled that the Rome declaration on World Food Security after the World Food Summit Plan of Action (1996) endorsed by Heads of States, agreed that “*trade is a key element in food security*”. The Plan of Action included a set of voluntary guidelines. The progress in the reduction of undernourished population has been dismal, and the extent to which trade contributed positively or negatively to reduce hunger is not known.

19. It was also remembered that the first considerations of the Committee on Fisheries Sub-Committee on Fish Trade began with the e-mail conference organized by FAO about this theme in 1998. It was followed by a presentation of two papers at the seventh session of the Sub-Committee in 2000. The main results of these papers showed that there was a relation between fish trade and per capita fish supply, as well as between average animal protein per capita supply and the share of fish in this protein supply. These relationships were found to be valid in the four groups of countries: top fish exporting countries, top fish importing countries, low income food deficit countries where fish is an important export commodity and also in the special case of PR China.

Session 3: Discussion of ongoing work pertinent to trade and food security undertaken by FAO and other agencies

20. There were 6 presentations delivered during this session:

- a) *The Ministry of Foreign Affairs (Norway) collaboration with FAO in the field of trade and food security*, by Mr Eirik G Jansen.

- b) *The FAO/MFA(Norway) Study of the Impact of International Trade in Fishery Products on Food Security*, by Mr John Kurien.
- c) *FAO activities related to international food trade (other than fish) and food security*, by Mr Ramesh Sharma.
- d) *Projection of future fish consumption, the role of trade for meeting the needs and the implications for food security: an IFPRI/ICLARM/FAO co-operative study*, by Mr Nikolas Wada.
- e) *Fish Trade, safety and food security*, by Mr Lahsen Ababouch.
- f) *Fish for the poor in a globalized economy*, by Mr Mahfuzuddin Ahmed.

21. The presentation regarding the collaboration of the Ministry of Foreign Affairs (Norway) with the FAO was preceded by a video presentation titled “Big Fish, Small Fry” which illustrated rather dramatically the situation which existed in the Kenyan part of Lake Victoria. Here the export of the Nile perch resulted in a substantial deprivation of the local community – the poor fish producers and fish consumers – of fish as a source of food. The diversion of *omena* (a small, low-value and highly nutritious food fish consumed by the poor) for reduction to fishmeal for use in the domestic poultry sector, highlights the broader issue of competition-for-end-use that may have major repercussions for food security. The video highlighted an extreme case of the adverse impact of international trade on local food security. The lessons learnt from Lake Victoria motivated the Ministry of Foreign Affairs of Norway to consider working with the FAO to work out a study proposal that would examine both the positive and negative impacts of fish trade on food security in developing countries.

22. The initial steps, taken by the FAO/MFA (Norway) project to commence case studies in 11 countries in order to examine the various “shades of grey” pertaining to the issue of international fish trade and its impact on food security, were elaborated. The propositions and the pathways toward possible food security enhancement and reduction resulting from international trade in fishery products were presented using a schematic diagram (See Annex 1). This study will examine the direct and indirect paths to food security/insecurity from the perspective of five categories: the nation, the fish producer, the fish workers, the fish consumers and the fish stock. As this study was to be completed in three to four months, it was intended primarily to raise appropriate questions, rather than provide approximate answers about the manner in which fish trade affected food security.

23. An overview of three non-fish international trade and household food security studies that are being undertaken by the FAO were sketched out. There was a surge in interest in such studies due to the concern about the impact of globalization on the poor. The first study on Trade Reform and Food Security being implemented by the ESC of FAO was intended to examine the impact of trade liberalization on agriculture development and food security. The country case studies (18 of them) were to focus on the experience of implementing the WTO Agreement on Agriculture. Prior to launching the studies an informal expert consultation provided the inputs for the preparation of two important publications. The first covered the analytical issues pertaining to trade and food security. The other was a handbook for researchers who were to undertake the country case studies. The studies would be completed by mid-2003.

24. The second study was on Globalization, Structural Adjustment and the Smallholders in Sub-Saharan Africa. It was funded by FAO and the World Bank. It arose from the concerns expressed at the World Bank regional consultations in Africa about the need to examine smallholder responsiveness to international price signals and intersectorial linkages and market institutions. The case studies adopted a two-stage analytical process. The first stage involved detailed field surveys and focussed on villages and households. The purpose was to estimate budgets for production activities and consumption expenditures. The second stage was to utilise more sophisticated analytical tools to construct Social Accounting Matrices (SAM) and Computable General Equilibrium (CGE) models. These would help to identify policy measures that enhance smallholder participation in the globalization process.

25. The third study is the recently launched Pro-Poor Livestock Policy Facility (PPLPF). This study would help to develop the capacity of national and international decision-making in support of poor people’s livestock related livelihoods. The mechanisms by which the poor can raise their share of gains from the expanding economic opportunities need to be built. This can be done by relieving some constraints and barriers that have been identified as: entry barriers, the lack of competitiveness and risks.

26. The Fish to 2020 study was undertaken to integrate fish into the International Model for Policy Analysis of Agricultural Commodities and Trade (IMPACT) model. The model developed several scenarios that were both optimistic and pessimistic in order to make an assessment of the likely global demand for fish by 2020. The three variables – enhanced income, urbanization and population growth – in the developing countries will contribute to a decline in the rate of growth of exports of fish from the developing countries. Consumption of fish outstrips population growth and the additional demand can only be supplied from aquaculture. All real prices will increase by different orders of magnitude, both absolutely and in relation to other food commodities, and this will have a disproportionately large impact on the poor who derive a significant share of their animal protein from fish. Developing countries will remain large exporters of fish, but at a lower level than today.

27. Food safety is increasingly becoming a matter of major concern in the discussion on food security. Unsafe food leads to adverse health as well as significant economic losses to the nation and the individual. In most developing countries, fish safety systems need very significant improvement. There is a need to build capacity to realise this. The focus should be to equalise quality standards for both the domestic and export markets. Some innovations such as the *Chorkor* stoves in West Africa have had a very significant role in improving both the income and the health of the women fish processors. Efforts to reduce post-harvest losses need greater stress. This can be tailored to reducing wastes and production of products for human consumption from low value aquatic resources. The overall improvement of quality and efficient utilisation of aquatic products can contribute to greater sustainable trade in fishery products by developing countries.

28. Fish for the poor in a globalized economy is a priority concern. Growing international trade in fishery products, which may indeed pay for the food imports of many developing countries, may also result in reducing the physical access and the economic access to fish among some sections of the poor in the exporting country. This can be caused by a variety of mechanisms that include: the inequity in the distribution of benefits from trade; the high costs of trade that can exclude the small producers and processors – particularly women – from the supply chain; and the compounding effects of WTO related regulations; Sanitary and Phyto Sanitary Measures (SPS) and Hazard Analysis and Critical Control Point (HACCP). However, the new forms of small-scale aquaculture, particularly in Asia, can become realms where the links between fish production and food security enhancement can work in favour of the poor. This is achieved by the role of pro-poor aquaculture in raising incomes, providing employment and enhancing direct consumption of fish. For such initiatives to be sustainable, the appropriate policy framework and public investments need to be made with foresight and vision.

Session 4: Elements of a methodological framework for the analysis of the effects of international trade on food security in exporting developing countries

29. There were two presentations delivered during this session:

- a) *Elements of a methodological framework for the analysis of the effects of international fish trade on food security*, by Mr Ramesh Sharma.
- b) *Criteria and methodology for the analysis of the effects of international fish trade on food security in fish exporting and importing developing countries*, by Mr Torbjorn Trondsen.

30. The first important methodological point was that the conceptual frames are needed to assess the impact of trade liberalization on food security at the national level and another to assess the same at the household level. The level of analysis must therefore be decided in advance. Secondly, there is need to examine the causal factors driving change, notably whether these are policy reforms or shocks or both. Shocks are indeed inevitable in the context of international trade. The impact of shocks should be analysed, in order to develop response and safety measures to safeguard food security. The vital issue is whether the poor are disproportionately affected. Thirdly, studies on trade and food security should aim at generating statistics that clearly show the extent to which fisheries production and trade contribute to the income of the poor and food-insecure households. At the macro level, while the GDP share of the fisheries sector is known, the distribution of this across the participants in the fish economy is less well known. The SAM framework will be useful in this context. Fourthly, the impact of fish exports on domestic prices needs to be examined. Increases in these prices will have an adverse effect on the food security of the poor. Fifthly, the issue of whether such studies must limit analysis to the fishery sector alone or venture into the realm of all the activities of the households studied needs to be resolved. Finally, the nature of the research methodology to

be adopted has to be decided. Will it be sample surveys, rapid rural appraisals, SAM-type data collection or descriptive analyses? While *ex-post* analysis is necessary for researchers – for the policy-makers, the *ex-ante* – “what if” types of analysis are more interesting. The need to blend these two concerns should be borne in mind when undertaking such studies.

31. In analysing the effect of international fish trade on food security in fish exporting and importing developing countries, models of fish marketing and industrial behaviour at the value chain level should also be adopted. The proposed methodology and criteria were presented and the main summary hypothesis were:

- International trade of fish improves economic development, but not necessarily for all.
- Trade might improve food security, but not necessarily for all low income groups.
- Food security measures should be integrated into international trade.

32. There was a suggestion that a measure which could improve both economic development and food security would be the implementation of “export quotas” of high value fish in which traders would have to import food as much as they export. Several questions were raised as to the feasibility of the proposal.

Session 5: Identification and discussion of specific positive and negative contributions of fish trade to food security

33. This session was in the format of a plenary discussion. An assessment of the positive and negative impacts of fish trade to food security was made using the schematic framework developed for the FAO/MFA (Norway) study (See Annex 1). The framework was sketched out keeping capture fisheries in mind. There was broad agreement about the usefulness of the schema to help follow the various likely food security enhancing and reducing consequences of international fish trade. It was pointed out that the negative impact of new forms of international trade on certain groups of fish workers traditionally involved in fish processing for the domestic market needed to be factored into the schema. The focus on incomes alone was inadequate. The positive employment generation impact of international trade in many country contexts needed to be stressed. The adverse impact of export-oriented production on the aquatic environment, particularly in the context of intensive aquaculture production, and the issue of conflict between different subsectors in the fish economy as well as between the fish economy and consumers - especially low income consumers - as a consequence of export production, needed to be mentioned. This sometimes reduces the incomes and jobs of one section of fish producers. These distributional implications need to be noted. As regards compensatory mechanisms to alleviate food security reduction, the focus should be both on possible income transfers and appropriate policy measures. Whether the lowering of fish prices in the importing country will lead to fish producers over-fishing their local fish stocks could not be generalized and requires to be investigated further. The structure of international trade has a bearing on the share that the producers will get from the export value realization. The impact that this has on food security needs to be examined.

34. There was a consensus that the negative and positive impacts varied over time and were country specific. The need for a historical analysis of the international trade, in order to be able to understand the evolving and complex factors which can create outcomes that may be favourable or adverse to food security, was stressed. It would be useful to tailor the schema to deal with the specific context of aquaculture also. Some negative impacts identified were:

- displacement of traditional fish workers;
- aquaculture of high value species and the use of fishmeal;
- environmental impact of aquaculture;
- wastage of resources due to discards and bycatch;
- intersectorial conflicts, e.g. industrial versus artisanal fisheries.

35. Departing from the analysis of the schema, the concrete impacts highlighted in the country presentations are summarized below:

Region/Country/ Institution	Positive aspects	Negative aspects
Kenya (Lake Victoria)	Increased employment (direct and indirect) Better prices Foreign exchange earnings Local direct revenues Some opportunity on fish frames trade	Employment displacement Declining stocks Declining average income of fishermen Transfer of benefits from fishermen to factory owners and middlemen Technological changes with negative impacts on environment less fish for domestic consumption
Thailand	Generates incomes Generates employment Generates foreign exchange earnings	Degradation of environment Marginalization of traditional fishers and fish farmers
Mauritania	Increased incomes Generates foreign exchange earnings Generates employment Improved competitiveness Improved quality of products	Overfishing Special benefits for foreign investors only Less fish for domestic consumption Problems for artisanal producers
Senegal	<i>In the past:</i> Generated foreign exchange earnings Generated employment	<i>Nowadays:</i> Overfishing Distortion of normal trade by exports incentives and fisheries agreements Less supply of fish to local market
Latin America	Increases diversity of offer and therefore total seafood consumption Generates foreign exchange earnings Generates employment	Foreign exchange is not always repatriated Exporters do not always consider environment
India	Generates higher incomes to small fish farmers and small fish producers including those from traditional communities Generates employment in processing of which 90 percent are women Generates foreign exchange Improves quality of fish even for domestic consumption	None currently apparent, taking the country as a whole. For certain localised regions and populations there may be negative implications that need to be studied
Egypt	Increased employment and income Enhanced foreign exchange earnings Local revenues increase Access to export markets	Increase of local fish prices Increased cost of fishing gear and machinery Less fish supply in local markets
Morocco	Foreign exchange earnings Increase of employment opportunities Improvement of processing technology and organization of the industry	Increase of fish prices on the domestic market Heavy pressure on the marine resources
ICSF International Collective in Support of Fish Workers		Impact of technical change on income and foreign exchange earnings Decrease of overall earnings, even if beach prices increase Increases the need of importing gears and machinery Generates intersectorial conflicts Tendency to monoproduction

Session 6: Elaboration of an FAO led work programme in the area of international fish trade and food security

36. There is an overarching commitment to the deliberations and the spirit of the World Food Summit (WFS). Of particular relevance in the context of this Expert Consultation is Commitment Four of the WFS: “We will strive to ensure that food, agricultural trade and overall trade policies are conducive to fostering food security for all through a fair and market-oriented world trade system”.

37. This global commitment, taken together with the directions of COFI Sub-Committee on Fish Trade to examine the impact of international fish trade on food security, forms the basis and rationale of this Expert

Consultation (EC). In this EC there were three distinct types of inputs provided by the experts. These consisted of :

- Presentations that covered initial investigations at the country/location level to examine, using the available data, whether international trade had a favourable or adverse impact on food security. The results of these analyses covered a wide spectrum of conclusions that were valid in themselves, but which could not be generalized over space and time.
- Presentations that dealt with the institutional framework (principles, norms, rules, commitments), which provided the normative rationale for ensuring that international trade takes into account the issue of food security as a matter of central concern, rather than a peripheral preoccupation.
- Presentations that dealt with matters of methodology and on specific technical matters. These subjects will help to inform us about the future realms of investigation and capacity development required at the national and regional levels to make the commitments to WFS and COFI a reality.

38. Based on the above, it was recommended that the FAO should lead a programme of work that would encompass:

- international coordination;
- support to initiatives at regional, national and subnational levels.

39. With regard to international coordination, the two key realms of action would relate to:

- the need to prepare technical guidelines for the Code of Conduct on Responsible Fisheries focusing on fish trade and food security;
- the examination of the options for bridging the projected gap between supply and demand for fishery products in the decades ahead keeping food security concerns in mind.

40. With regard to regional, national and subnational level initiatives the two realms of action would relate to:

- capacity building to equip policy-makers and technical personnel and to make them adequately competent to deal, at the international level, with issues of fish trade and food security (e.g. WTO, EU/ACP agreements, etc.);
- help governments to evaluate the variety of options and opportunities before them in the realm of international market opportunities and help to reconcile the inevitable conflicts that always exist between trade in fishery products and issues related to both the direct and indirect adverse impacts which this trade can have on food security.

41. The participants agreed with this work programme and made the following recommendations:

- to take gender aspects, as well as marginalized groups interests into account;
- FAO Fisheries Department should continue to seek further synergies through collaboration with other FAO departments and other competent international agencies (e.g. IFPRI and World Fish Centre, etc.);
- to disseminate widely the results of the work programme, not forgetting the private sector, in which context the FISH INFO network was recognized as an important tool for this purpose;
- to promote regional trade for food security.

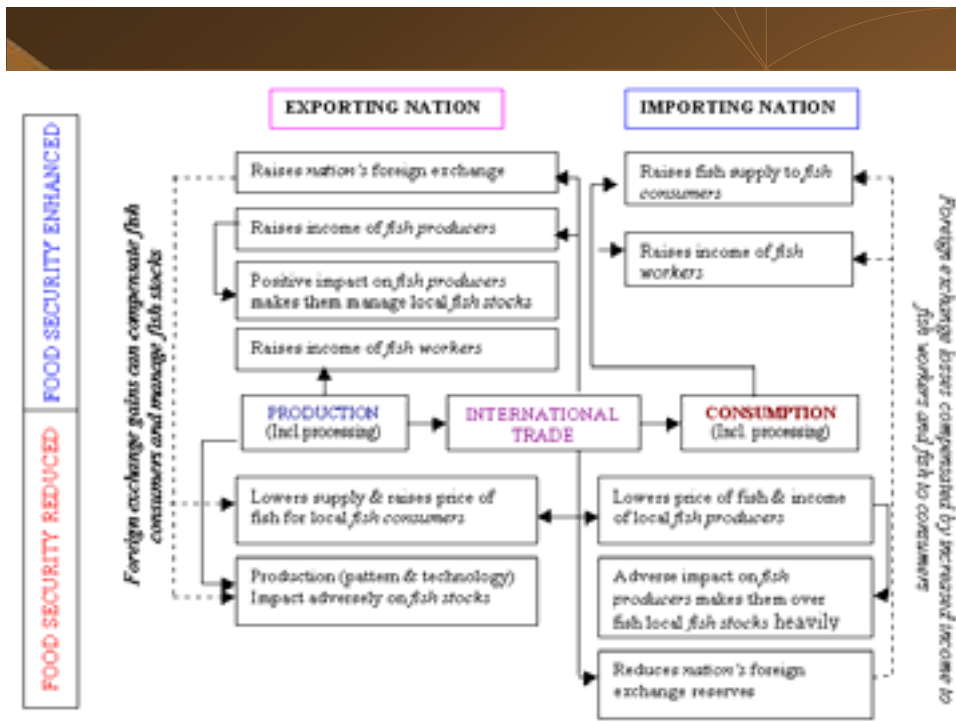
42. Specific recommendations regarding the work programme were formulated under three headings and are given below.

Technical guidelines for CCRF	Training and capacity building	Analysis of national options
Conduct background study on the normative framework for fish trade and food security	Train and improve capacity of policy-makers and technical personnel on international issues dealing with fish trade and food security	Expand the FAO work on the distribution of costs and benefits in the fishing industry
Organize a consultative process on the normative framework	Integrate the fish trade and food security issues into the proposed "FAO Technical Project – WTO".	Prepare an analytical framework taking into account conflicting interests with specific illustrative cases studies
Prepare the technical guidelines on fish trade and food security		Conduct studies on the impact of fish trade on household food security
		Develop medium and long term projections on the impact of fish trade on food security

IFPRI and the World Fish Centre offered collaboration for the elaboration of forecast implications at a regional level with regard to policy options.

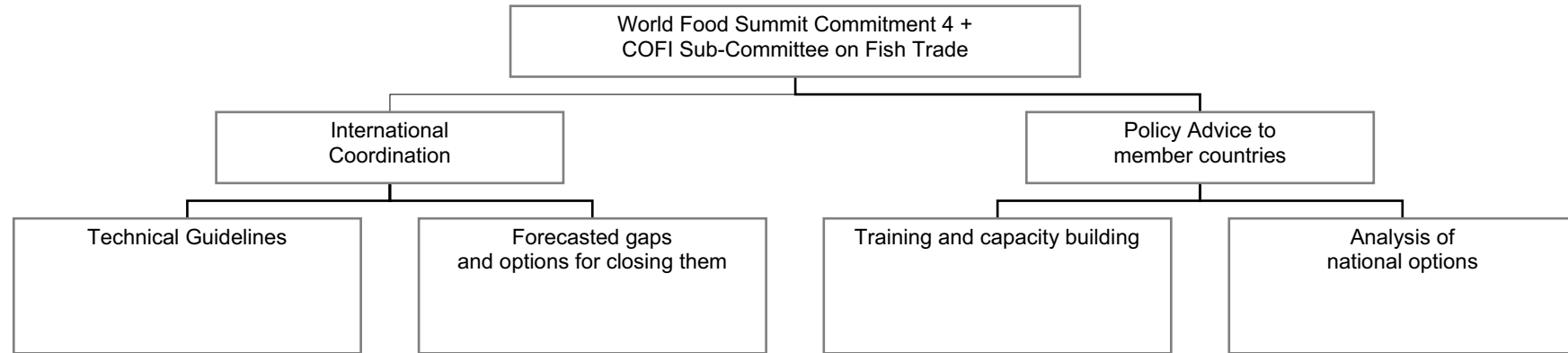
43. The present report was approved by the participants on 30 January 2003.

ANNEX 1



Source: Kurien, J. (2002), Concept Note for the FAO/MFA (Norway) Study on the Impact of International Trade in Fishery Products on Food Security (unpublished)

ANNEX 2



PROGRAMME

Monday, 27 January 2003

Registration

Opening Session (Driss Meski, Infosamak's President)

- Mr. Rhanmi Tijani
General Secretary of the Ministry of Marine Fisheries (on behalf of Mr Tayeb Rhafes, Minister of Maritime Fishing, Kingdom of Morocco)
- Mr. Amor Ben Romdhane
FAO Representative to the Kingdom of Morocco
- Mr. Abdellatif Belkouch
Infosamak Managing Director

Election of chairperson and rapporteur (s)

Session 1: Presentation and analysis of country/regional papers from selected fish exporting developing countries.

Chairperson: Piumsombun Somying

Egypt (Izzat Feidi)
North Africa: The case of Morocco (Mohamed Naji)
Morocco: Role of fish export (Hmida Atmani)
Mauritania (Ba Abu Sidi)
Senegal (Ousmane Ndiaye)
Lake Victoria (Richard Abila)

Session 1: Presentation and analysis of country/regional papers from selected fish exporting developing countries.

Chairperson: Dr Ba Abu Sidi

India (Jose Cyriac)
Thailand (Piumsombun Somying)
Vietnam (Nguyen Huu Dung) – No presentation made, but paper forwarded.
Latin America (Roland Wiefels)

Session 2: Considerations related to the political environment of fish trade and food security.

Chairperson: Mr Erhard Ruckes

Fish trade, food security and the human right to adequate food (George Kent)

International fish trade and food security: The challenges for arriving at balanced government decisions (Jean François Abgrall)

Results of the World Food Summit in relation to international fish trade and food security (Helga Josupeit/ Erhard Ruckes)

Considerations of the COFI Sub-Committee on Fish Trade in relation to international trade and food security (Helga Josupeit)

Preliminary findings of the FAO/MFA Norway study on fish trade and food security (John Kurien/ Erhard Ruckes)

Tuesday, 28 January 2003

Session 3: Discussion of ongoing work pertinent to trade and food security undertaken by FAO and other agencies.

Chairperson: Ms Helga Josupeit

FAO activities related to international food trade (other than fish) and food security (Ramesh Sharma)

Projections of future fish consumption, the role of trade for meeting the needs and the implications for food security - an IFPRI/ICLARM/FAO cooperative study (Nikolas Wada)

Why MFA (Norway) collaborates with FAO in this field (Eirik. G. Jansen)

Fish trade, safety and food security (Lahsen Ababouch)

Fish for the poor in a globalized economy (Ahmed Mahfuzuddin)

Session 4: Elements of a methodological framework for the analysis of the effects of international fish trade on food security in exporting developing countries.

Chairperson: Mr Erhard Ruckes

Elements of a methodological framework for the analysis of the effects of international fish trade on food security (Ramesh Sharma)

Criteria and methodology for the analysis of the effects of international fish trade on food security in fish exporting and importing developing countries (Torbjorn Trondsen)

Session 5: Identification and discussion of specific negative impacts of fish trade on food security.

Chairperson: Mr Eirik. G. Jansen

Session 5: Identification and discussion of specific positive contributions of fish trade to food security.

Chairperson: Mr Eirik. G. Jansen

Wednesday, 29 January 2003

Elaboration of an FAO led work programme in the area of international fish trade and food security.

Chairperson: Mr Lahsen Ababouch

The Consultation is requested to determine situations where actions for safeguarding food security may be required, what the objectives of the interventions should be and by which means they should be achieved. These parameters may differ and it may be necessary therefore, to work out several examples. An indicative time frame should be provided, financial requirements assessed and potential cooperating parties identified.

Afternoon: Social programme

Thursday, 30 January 2003

Adoption of the Report of the Expert Consultation

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LIST OF DOCUMENTS

Presentations

- Ababouch, L. – **IMPACT OF FISH SAFETY AND QUALITY ON FOOD SECURITY**
- Abgrall, J-F. – **FISHERIES, FOOD SECURITY AND TRADE: GOVERNANCE
A KEY TO SUCCESS**
- Josupeit, H. – **CONSIDERATIONS OF THE COFI SUB-COMMITTEE ON FISH
TRADE IN RELATION TO INTERNATIONAL TRADE AND FOOD
SECURITY**
- Kent, G. – **FISH TRADE, FOOD SECURITY, AND THE HUMAN RIGHT TO
ADEQUATE FOOD**
- Kurien, J. – **STUDY ON THE IMPACT OF INTERNATIONAL TRADE IN
FISHERY PRODUCTS ON FOOD SECURITY**
- Mahfuzuddin, A. – **FISH FOR THE POOR IN A GLOBALIZED ECONOMY – MACRO
BENEFITS VS MICRO IMPACTS**
- Sharma, R. – **AN OVERVIEW OF THE FAO STUDIES ON INTERNATIONAL
TRADE AND HOUSEHOLD FOOD SECURITY AND
METHODOLOGIES**
- Trondsen, T. – **CRITERIA AND METHODOLOGY TO IMPROVE THE EFFECTS
OF INTERNATIONAL TRADE ON FOOD SECURITY IN FISH
EXPORTING AND FISH IMPORTING DEVELOPING COUNTRIES**

Country Papers

- Egypt/ Feidi, I.H.
IMPACT OF INTERNATIONAL FISH TRADE ON FOOD SECURITY IN EGYPT
- India/ Cyriac, J.
THE MARINE PRODUCTS EXPORT DEVELOPMENT AUTHORITY
- Kenya/ Abila, R.O.
**FISH TRADE AND FOOD SECURITY: ARE THEY RECONCILABLE IN LAKE
VICTORIA?**
- Latin America/ Wiefels, R.
**STUDY ON THE IMPACT OF INTERNATIONAL TRADE IN FISHERY PRODUCTS ON
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- Mauritania/ Sidi, B.A.
FISH TRADE AND FOOD SECURITY IN MAURITANIA

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Morocco/ Naji, M.

THE IMPACT OF INTERNATIONAL FISH TRADE ON FOOD SECURITY IN MOROCCO

Senegal/ Ndiaye, O.

INTERNATIONAL FISH TRADE AND FOOD SECURITY - CASE OF SENEGAL

Thailand/ Piumsombun, S.

THE IMPACT OF INTERNATIONAL FISH TRADE ON FOOD SECURITY IN THAILAND

Viet Nam/ Hung Duu, N.

STATUS OF FISH TRADE AND FOOD SECURITY IN VIET NAM

**Allocution de Monsieur Tayeb RHAFES
Ministre des pêches maritimes**

L'ouverture des travaux de la Consultation d'experts sur le commerce des produits de la pêche et la sécurité alimentaire

Monsieur le Représentant de la FAO au Maroc,
Mesdames et Messieurs les participants,

C'est avec un réel plaisir que je préside aujourd'hui à Casablanca, l'ouverture des travaux de la Consultation d'experts organisée par la FAO et Infosamak sur le thème du commerce des produits de la pêche et la sécurité alimentaire. Ma joie est d'autant plus grande que cette importante manifestation est marquée par la présence active et responsable de personnalités et d'experts au fait des questions liées au secteur halieutique et ses implications nutritionnelles.

Qu'il me soit ainsi permis de rendre un vibrant hommage aux organisateurs de cet atelier qui vient à point nommé nous rappeler les enjeux majeurs des pêcheries mondiales et du commerce des produits de la pêche et leur capacité à réduire les déficits alimentaire et la pauvreté à l'échelle internationale.

Le contexte mondial dans lequel se tient cette rencontre connaît de profondes mutations engendrées par l'étendue de la mondialisation de l'économie et une globalisation accélérée du commerce, ainsi que par des flux des investissements importants qui sont tout à la fois porteurs d'espoirs pour les pays en développement, mais également de défis majeurs à relever aux plans de la compétitivité, de la durabilité, de la qualité et surtout des compétences humaines. Il est certain que le démantèlement des barrières tarifaires et l'harmonisation des réglementations douanières permettent la création d'un vaste marché et imprime une nouvelle impulsion aux échanges mondiaux.

Comme vous le savez, ces nouvelles données internationales se traduisent au niveau du secteur des pêches par un accroissement significatif du commerce, activé par la prolifération des réseaux des nouvelles technologies de l'information et de la communication avec toutes les conséquences que cela implique au plan de la gestion des pêcheries. En effet et selon les statistiques de la FAO, les importations mondiales des produits de la pêche atteignent actuellement près de 59 Milliards \$US; de même que la valeur des exportations a été estimée à 54 Milliards \$US.

Dans le cadre de cette dynamique, nous assistons à une forte demande externe des produits de la pêche, mettant les pays en développement exportateurs de ces denrées devant un dilemme où les besoins nationaux de consommation rentrent en compétition directe avec les nécessités d'une logique d'exportation devant générer une forte valeur ajoutée.

C'est une situation manichéenne qui rend difficile l'arbitrage des décideurs politiques, confrontés d'une part aux impératifs de satisfaction des besoins alimentaires nationaux et d'autre part à la nécessité de disposer de recettes en devises pour financer le développement de leurs pays.

Toutefois, et malgré la complexité de ces choix stratégiques, comme cela a été reconnu par la FAO, il est de plus en plus établi que le commerce du poisson contribue à l'amélioration des disponibilités de protéines d'origines diverses, particulièrement dans les pays en développement, par l'utilisation des recettes provenant de l'exportation des produits de la pêche pour répondre aux nécessités nutritionnels des couches les plus vulnérables des populations.

Ces exportations permettent également de créer de nouvelles opportunités d'emplois, d'accroître le pouvoir d'achat des communautés de marins pêcheurs et d'améliorer leur niveau de vie, et c'est là où réside réellement la sécurité alimentaire dans son acceptation la plus large. Il ne s'agit pas d'une simple question de subsistance mais d'une amélioration substantielle de leur bien être économique et social.

Mesdames et Messieurs,

Ceci étant, il est évident que la problématique du commerce des produits de la pêche et la sécurité alimentaire doit être avant tout, appréhendée en termes de disponibilité de la ressource. Or l'état actuel de

surexploitation de la plupart des pêcheries mondiales reste préoccupant en raison d'une pression de pêche qui dépasse largement les capacités de renouvellement naturel de la ressource et compromet même sa biodiversité. De même, nous assistons à une dégradation constante des écosystèmes et de la qualité de l'environnement marins, ainsi qu'à un gaspillage de plus en plus inquiétant à tous les niveaux de la chaîne de production.

Dans ce contexte de précarité et d'incertitude, le secteur des pêches se trouve pris entre les tenailles d'une demande de plus en plus soutenue en produits de la pêche générée par une forte croissance démographique et d'une pression démesurée sur les stocks halieutiques, accentuée par les attentes légitimes de développement économique.

Il s'agit donc pour la communauté internationale de corriger les tendances actuelles fort préoccupantes par la mise en œuvre des mesures de conservation et d'aménagement des ressources halieutiques telles qu'elles découlent notamment des dispositions pertinentes du code de conduite pour une pêche responsable et des recommandations et plans d'action du Sommet Mondial de l'Alimentation et de la Déclaration de Kyoto sur la contribution durable des pêches à la sécurité alimentaire.

De même, la prospection de ressources halieutiques peu ou pas exploitées ainsi que le promotion de l'aquaculture constituent des modes alternatifs en vue d'accroître les disponibilités alimentaires d'origine aquatique. Cependant, on ne saurait s'engager dans cette voie sans s'appuyer sur une recherche scientifique soutenue et fiable, selon une approche écosystémique intégrant tous les paramètres liés à l'exploitation des pêcheries.

Monsieur le Représentant de la FAO,
Mesdames, Messieurs

Le Royaume du Maroc est pleinement conscient des défis auxquels devraient faire face la communauté internationale et tient, en tant que pays exerçant la pleine souveraineté sur un important patrimoine halieutique à exprimer sa disposition à souscrire à cette dynamique de mise en œuvre de ce dispositif de protection de la ressource afin que les pêches et l'aquaculture puissent continuer à accomplir durablement leur rôle de générateur d'apports protéiques, nécessaire à l'alimentation humaine.

Face à ces défis, le Maroc s'engage aujourd'hui dans une politique de pêche axée sur l'optimisation de la rentabilité économique du secteur halieutique, prenant en considération les paramètres biologiques, environnementaux et sociaux et sa contribution au financement de l'économie nationale. Dans cette approche, l'accent sera mis essentiellement sur:

- la préservation de la ressource halieutique et son exploitation durable au profit des générations présentes et futures,
- la valorisation de notre potentiel aquacole en tant qu'alternative devant soutenir une politique de pêche précautionneuse,
- une contribution accrue à la sécurité alimentaire par une meilleure disponibilité des produits de la pêche à des prix raisonnables en développant et en rationalisant les circuits de distribution et de commercialisation,
- le développement de la valorisation industrielle du poisson dans le cadre d'un partenariat international à promouvoir particulièrement dans les nouvelles pêcheries,
- la promotion des exportations et la diversification des marchés par une politique dynamique de promotion du Label Maroc,
- le développement d'une démarche qualité totale au niveau de l'ensemble de la filière pêche par une mobilisation des compétences humaines et leur constante adaptation aux nouvelles technologies en la matière,
- la mise à niveau sociale par une formation qualifiante et l'amélioration des systèmes d'assurance et de prévoyance sociale,
- la construction de villages de pêcheurs, en tant que micro pôles de développement devant contribuer à rationaliser la pêche et à créer des espaces de richesse littoraux à même d'améliorer le bien être économique et social des communautés de pêcheurs artisanaux.

Les axes d'une telle vision stratégique sont en cours de mise en place, selon une démarche participative, dans le cadre d'un contrat programme impliquant les pouvoirs publics et l'ensemble des opérateurs du secteur. Ce contrat qui puise ses fondements dans les Hautes Directives et Orientations de Sa Majesté le ROI Mohammed VI, fixera les engagements de chacune des parties pour assurer au secteur des pêches national dans toutes ses composantes, un développement harmonieux, écologiquement sain et socialement équitable tout en confortant le positionnement halieutique du Maroc au plan mondial.

Mesdames et Messieurs,

Je suis persuadé que les débats que suscitera cette consultation serviront sans aucun doute à appréhender l'impact positif et négatif du commerce du poisson sur la sécurité alimentaire et fourniront des orientations aux décideurs et analystes pour la promotion d'un commerce responsable prenant en compte autant les contraintes nutritionnelles que les exigences de croissance économique des pays en développement. Dans cette perspective, les résultats de vos travaux apporteront sûrement un appui appréciable à l'action de la communauté internationale dans sa recherche permanente d'une adéquation entre la durabilité de l'offre des produits de la pêche et les impératifs de la sécurité alimentaire.

Il s'agit là, d'une préoccupation majeure; d'autant qu'il est inacceptable d'admettre de nos jours que plus de 800 Millions de personnes à travers le monde, particulièrement dans les pays en développement ne disposent pas d'une nourriture suffisante pour leurs besoins nutritionnels élémentaires, situation aggravée par l'insuffisance chronique des revenus, les effets de la sécheresse et des épidémies, ainsi que par les catastrophes naturelles ou causées par l'homme.

Sans perdre l'espoir que la conjugaison des efforts de la communauté internationale puisse atténuer ces souffrances et ces déficits vivriers alarmants, je voudrais rendre, à nouveau un vibrant hommage à la FAO pour son implication directe et effective et pour les actions qu'elle mène pour donner plein sens à la solidarité active dans la voie d'une meilleure contribution des pêches et de l'aquaculture à la résolution des problèmes alimentaires que connaît une partie des habitants de notre planète.

Je puis vous assurer que le Maroc qui cultive déjà avec succès cette démarche de solidarité agissante au plan national, sous l'impulsion clairvoyante et généreuse de Sa Majesté Mohammed VI que Dieu l'Assiste, n'épargnera aucun effort pour être le partenaire des processus et des plans d'action devant soutenir les initiatives internationales visant à réduire la pauvreté et l'exclusion à l'échelle planétaire; il y va de l'avenir à nous tous

Je souhaite plein succès à vos travaux et à tous les participants à cette consultation, un agréable séjour parmi nous.

Je vous remercie de votre attention.