



COMMITTEE ON FISHERIES

Thirty-sixth Session

8–12 July 2024

FISHERIES AND AQUACULTURE WITHIN THE 2030 AGENDA FOR SUSTAINABLE DEVELOPMENT AND SUSTAINABLE DEVELOPMENT GOAL 14 (SDG 14)

EXECUTIVE SUMMARY

This document provides an overview of the contribution of fisheries and aquaculture towards achieving the 2030 Agenda for Sustainable Development, with an update on the status of progress and trends in the implementation of indicators of Sustainable Development Goal 14 (SDG 14) under FAO custodianship. The document then discusses investment opportunities and technical priorities to accelerate aquatic food system transformation for sustainable development, leveraging interlinkages between SDG 14 and other SDGs.

Queries on the substantive content of this document may be addressed to:

Audun Lem

Deputy Director

FAO Fisheries and Aquaculture Division

Email: Audun.Lem@fao.org

I. INTRODUCTION

1. The 2030 Agenda for Sustainable Development continues to shape the strategies of countries, international organizations and civil society, striving for a fair, prosperous and sustainable world in which no one is left behind. The seventeen Sustainable Development Goals (SDGs) which form the 2030 Agenda are central to the achievement of inclusive, sustainable economic growth that encompasses environmental, economic and social concerns.

2. Implementation of the 2030 Agenda is universal, being equally relevant to developed and developing nations. The interconnected nature of the SDGs makes them indivisible by nature, with progress in one area assisting progress in another. It also places a strong emphasis on integrated approaches to development and requires that results from related indicators be jointly evaluated to allow a comprehensive analysis of the impacts and trade-offs between different development paths. The SDGs are ambitious and call for comprehensive and participatory approaches, aimed at ending poverty and hunger while sustainably managing natural resources.

3. The Inter-Agency and Expert Group on Sustainable Development Goal Indicators (IAEG-SDGs) and the High-level Group for Partnership, Coordination and Capacity-Building for statistics for the 2030 Agenda for Sustainable Development (HLG-PCCB) are the expert groups mandated to develop and implement the global indicator framework for the Goals and targets of the 2030 Agenda. Both groups are composed of Members and include regional and international agencies as observers.

4. FAO provides overall support to Members in integrating the SDGs into national development plans. Food and agriculture are key to sustainable development and FAO continues to support policymaking, partnership-building, capacity development and project implementation built on the three dimensions of sustainability. Both the SDGs and the FAO Strategic Framework 2022–2031 are geared towards tackling the root causes of poverty and hunger, building a fairer society and leaving no one behind. In this regard, FAO fulfils many roles, compiling data and information, setting standards and working towards generating advice in support of national decision-making.

II. PROGRESS AND CHALLENGES IN RELATION TO MONITORING, REPORTING AND ADDRESSING SDG14 INDICATORS AND TARGETS

5. It is generally acknowledged that international guidance – such as provided by FAO through the Code of Conduct for Responsible Fisheries (CCRF), the Ecosystem Approach to Fisheries and Aquaculture (EAF), the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (SSF Guidelines), the Port State Measures Agreement (PSMA) and others form key elements in implementing change and monitoring progress towards the 2030 Agenda.

6. The ten targets of SDG 14 are wide-ranging and diverse, addressing fundamental issues for healthy and sustainable ocean economies, with specific objectives to reduce marine pollution, protect aquatic ecosystems, minimize ocean acidification, secure fisheries sustainability, develop scientific capacity relevant to fisheries and improve the implementation of international law pertinent to the sustainable use of oceans. The targets are also strongly interlinked, with progress in one area having strong implications for others. The underlying importance of sustainable development that considers environmental, social, and economic sustainability permeates the rationale of all the objectives, requiring action to be taken across multiple fronts in order to progress towards the targets.

7. FAO is the custodian agency for 4 of the 10 indicators for SDG 14. All indicators under SDG 14 for which FAO is the custodian agency are classified as Tier 1, indicating well-established and internationally applicable methodologies.¹ The four indicators are:

- 14.4.1 Proportion of fish stocks within biologically sustainable levels.
- 14.6.1 Progress by countries in the degree of implementation of international instruments aiming to combat illegal, unreported and unregulated (IUU) fishing.
- 14.7.1 Sustainable fisheries as a proportion of GDP in small island developing States, least developed countries and all countries.
- 14.b.1 Degree of application of a legal/regulatory/policy/institutional framework which recognizes and protects access rights for small-scale fisheries.

8. As custodian and coordinator of these SDG indicators,² FAO has the direct responsibility to:

- (i) Lead methodological development and documentation of indicators.
- (ii) Support statistical capacity of countries to generate and disseminate national data.
- (iii) Collect data from national sources and ensure their comparability and consistency.
- (iv) Disseminate the data to enable monitoring of progress at the global, regional and national levels.
- (v) Contribute to the annual global SDG progress report for the High-Level Political Forum.

9. Below is a summary by target and indicator on monitoring progress, a brief assessment of trends in the indicators, and a summary of further actions required to progress towards achieving the targets.

SDG INDICATOR 14.4.1 – Proportion of fish stocks within biologically sustainable levels

10. **TARGET:** By 2020, effectively regulate harvesting and end overfishing, illegal, unreported and unregulated fishing and destructive fishing practices and implement science-based management plans, in order to restore fish stocks in the shortest time feasible, at least to levels that can produce maximum sustainable yield as determined by their biological characteristics.

Status assessment: Far from target

Trend assessment: Global deterioration, with differing regional trends

11. The indicator measures the sustainability of the world's marine capture fisheries based on their abundance trends. A fish stock whose abundance is at or greater than the level that can produce the maximum sustainable yield (MSY) is classified as biologically sustainable. In contrast, when abundance falls below 80 percent of the MSY level, the stock is considered biologically unsustainable.

12. By this measure, the sustainability of global fish stocks has declined from 90 percent in 1974 to 62.5 percent in 2021. However, the contribution to global marine fish landings from fish stocks within biologically sustainable levels has increased, from 66.7 percent in 2015, when the 2030 Agenda was adopted, to 78.9 percent in 2021. Total global marine fish landings have remained relatively stable at around 80 million tonnes since 1995.

13. It is fundamentally important that the abundance of stocks be maintained at levels which allow them to fully replenish under current conditions and with present harvesting levels, in order to ensure that fisheries are able to support economic and social sustainability. There are some good examples of progress, including all major global tuna stocks, where the proportion of stocks in a healthy state has

¹ SDG indicators classified as Tier 1 are conceptually clear, with an internationally established methodology and available standards, with data regularly produced by countries for at least 50 percent of countries and of the population in every region where the indicator is relevant.

² For more information see www.fao.org/sustainable-development-goals/goals/goal-14/en/

increased from below 40 percent in 2012 to 78 percent in 2023, or Northeast Atlantic fish stocks where 73 percent were subject to overfishing in 2003 and only 26 percent were subject to overfishing in 2021, among others. These examples, and others, demonstrate that management action can reverse unsustainable trends in a reasonably short period of time.

14. Implementation of 14.4 has strong positive implications for achieving SDG 2 – Zero hunger, SDG 12 – Responsible consumption and production, and SDG 13 – Climate action. Sustainable stocks are central to the future of sustainable food systems, where fish are able to continue to play their vital role in food and nutrition security which they do today for generations to come.

15. Assessment of a stock is essential for ensuring proper management, providing a scientific and quantitative basis from which to develop and implement a management plan. The FAO 14.4.1 e-learning course provides detailed guidance on the process and tools for analysis and reporting on the indicator. The course covers both classical stock assessment as well as methodologies for conducting stock assessment in situations where data or technical capacity is limited, while remaining reliable and universally applicable. Capacity building for data collection on catch, effort and biological data are being conducted in various regions, with a series of eight capacity development workshops, attended by more than 600 participants from 96 countries, held between the end of 2019 and early 2022.

16. FAO seeks to transform aquatic food systems and ensure that effective management of all fisheries delivers healthy stocks and secures equitable livelihoods. The following targets are the strategic focus of FAO for transforming fisheries:

- Effective policies, governance structures and institutions support fisheries
- Equitable access to resources and services enhance the livelihoods of fishers and fish workers
- Effective fisheries management systems address ecological, social and economic objectives, while considering trade-offs
- Fishing fleets are efficient, safe, innovative and profitable

SDG INDICATOR 14.6.1 – Progress by countries in the degree of implementation of international instruments aiming to combat illegal, unreported and unregulated (IUU) fishing

17. TARGET: By 2020, prohibit certain forms of fisheries subsidies which contribute to overcapacity and overfishing, eliminate subsidies that contribute to illegal, unreported and unregulated fishing and refrain from introducing new such subsidies, recognizing that appropriate and effective special and differential treatment for developing and least developed countries should be an integral part of the World Trade Organization fisheries subsidies negotiation.

Current status: Very close to target

Trend assessment: Slight improvement

18. The indicator measures national progress in the implementation of five principal international instruments which together provide a strong framework for combatting IUU fishing. The level of implementation is assessed through responses to specific questions, carried in various sections of the questionnaire for monitoring the implementation of the Code of Conduct for Responsible Fisheries (CCRF) and related instruments (CCRF questionnaire), relating to the following instruments (the percentage in brackets refers to their respective weightings applied in the assessment):

- (i) Adherence and implementation of the 1982 United Nations Convention on the Law of the Sea (10 percent).
- (ii) Adherence and implementation of the 1995 United Nations Fish Stocks Agreement (UNFSA)⁵ (10 percent).
- (iii) Development and implementation of a national plan of action (NPOA) to combat IUU fishing in line with the 2001 FAO International Plan of Action to Prevent, Deter, and Eliminate Illegal, Unreported and Unregulated Fishing (IPOA-IUU) (30 percent).
- (iv) Adherence and implementation of the 2009 FAO PSMA (30 percent).

- (v) Implementation of Flag State Responsibilities in the context of the 1993 FAO Compliance Agreement and FAO 2015 Voluntary Guidelines for Flag State Performance (20 percent).

19. Countries have made progress in combatting IUU fishing, with close to 75 percent scoring highly in their degree of implementation of relevant international instruments in 2022, compared to 70 percent in 2018. This progress was also reflected with the average score for this indicator rising from 3/5 to 4/5 over this period. The challenges in fully implementing these instruments are particularly acute for Least Developed Countries (LDCs), which have maintained a medium level of implementation. Meanwhile, Small Island Developing States (SIDS) saw their indicator rise from 3/5 in 2018 and 2020 to 4/5 in 2022.

20. IUU fishing remains, in its multi-faceted complexity (illegality, under reporting, unregulation), one of the greatest threats to aquatic ecosystems and to fishers and communities who rely on their resources for nutrition and livelihoods. This is due to its potent ability to undermine national and regional efforts to manage fisheries sustainably and conserve marine biodiversity.

21. By reducing the prevalence of IUU fishing through the implementation of appropriate governance there will be progress not only on this indicator, but also in other areas of the 2030 Agenda, especially SDG 8 – Decent work and economic growth, SDG 12 – Responsible consumption and production, and SDG 16 – Peace, justice and strong institutions.

22. FAO has created the Global Capacity Development Portal to facilitate the sharing of knowledge and information, to promote synergies, complementarities and exchanges among relevant programmes, projects, and institutions, whilst avoiding overlapping and the duplication of interventions. It is a publicly accessible online tool that brings together information on capacity development projects around the world aiming to support States in combatting IUU fishing through efforts to:

- strengthen of national policy and legislative frameworks to combat IUU fishing;
- strengthen monitoring, control, surveillance and enforcement capacities;
- enhance of national institutions' capacity to improve flag State performance;
- further develop and implement traceability and market measures;
- enhance coordination and cooperation at national, regional and global level, including inter-agency cooperation; and
- develop and use the global information exchange systems, namely through the PSMA Global Information Exchange System and the Global Record of Fishing Vessels, Refrigerated Transport Vessels and Supply Vessels.

23. During the World Trade Organization (WTO) 12th Ministerial Conference, countries agreed on rules addressing fisheries subsidies, with a focus on overfished stocks and IUU fishing. A multilateral agreement regulating fisheries subsidies, with specific disciplines towards IUU fishing and cross-references to the PSMA, marks a major step forward towards ocean sustainability by prohibiting harmful fisheries subsidies that contribute to overfishing and IUU fishing. The Agreement³ will enter into force upon acceptance by two-thirds of the WTO membership. By the end of May 2024, 72 WTO Members formally accepted the Agreement. Thirty-eight more formal acceptances are needed for the Agreement to come into effect.

24. FAO Members have taken a wide range of steps to enhance the sustainability of their fisheries. Around two-thirds have reported having developed a national plan of action to combat IUU fishing.

³ https://www.wto.org/english/tratop_e/rulesneg_e/fish_e/fish_e.htm

More than three-quarters have started implementing the EAF, almost all of whom have taken appropriate management action and established ecological, socio-economic, and governance objectives. Nearly all reported having taken steps to control fisheries operations within and outside their exclusive economic zones (EEZ).

SDG INDICATOR 14.7.1 – Sustainable fisheries as a proportion of GDP in small island developing States, least developed countries and all countries

25. TARGET: By 2030, increase the economic benefits to Small Island developing States and least developed countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism.

Status assessment: Not possible due to absence of a numerical yardstick in target

Trend assessment: Slight decline

26. This indicator is calculated exclusively from data already published by National Statistics Offices or international agencies. This gives consistent current and historical coverage without creating an additional reporting burden for countries.

27. Calculation of this indicator is built on internationally recognized standards and statistics, including:

- Value-added of fisheries and aquaculture.
- Biological sustainability of fish stocks.
- Gross domestic product.

28. At the global level, the contribution of sustainable fisheries to GDP has remained fairly stable at around 0.1 percent, reflecting the interplay of two opposing trends: a consistently rising value-added from fisheries and a continued decline in the sustainability of global fishery stocks. Sustainable marine capture fisheries make a substantial contribution to the GDPs of Pacific SIDS and LDCs, where fishing activities are vital to local communities and indigenous people. However, both of these groups of countries have seen their indicator fall between 2011 and 2021, from 1.70 percent to 1.63 percent and 1.27 percent to 0.81 percent respectively.

29. Fisheries support the livelihoods of millions worldwide, providing an important source of income and food security. Ensuring that fisheries resources are appropriately safeguarded is inextricably linked to their continued contribution to economies and sustainable development, especially for LDCs and SIDS.

30. The multifaceted character of this indicator allows positive spill overs that can be particularly relevant in supporting other areas of the 2030 Agenda, including minimizing the negative effects of COVID-19, especially involving SDG 1 (no poverty), SDG 8 (decent work and economic growth), SDG 12 (responsible consumption and production patterns). For this indicator, long-term improvements can be emphasized and boosted by monitoring directly quantifiable benefits, namely Gross Domestic Product (GDP), and linking any outcomes to sustainable practices.

31. Effective fisheries management, supportive and transparent government initiatives, better access to information and the implementation of new technologies are critical to increasing the contribution of sustainable fisheries to GDP, particularly in countries where fisheries are central for local economies, food security and vulnerable communities.

SDG INDICATOR 14.B.1 – Degree of application of a legal/regulatory/policy/institutional framework which recognizes and protects access rights for small-scale fisheries

32. TARGET: Provide access for small-scale artisanal fishers to marine resources and markets.

Current status: Very close to target

Trend assessment: Slight deterioration

33. The indicator is a composite indicator calculated on the basis of the efforts being made by countries to implement selected key provisions of the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (SSF Guidelines).

34. Globally, the degree of application of a legal/regulatory/policy/institutional framework which recognize and protects access rights for small-scale fisheries in 2022 was at the highest level, based on data available since reporting began in 2018, reaching a maximum score of 5 out of 5. However, reporting for 2024 saw the global average for the indicator fall to 4. Based on available data, regional scores have generally remained stable or improved, with most regions earning a score of 4 out of 5. However, Northern Africa and Western Asia scored lower in 2024 and 2022 than in 2020. FAO therefore continues its efforts to assist countries to strengthen the role and recognition of SSF at national levels, as well as to continue to report on their results.

35. The contribution of small-scale fisheries to sustainable development is critical. Small-scale artisanal capture fisheries employ about 90 percent of those employed in capture fisheries value chains, equivalent to 60 million people. They are of great importance for food systems, livelihoods, culture, and the environment, and by extension so too is an enabling environment which recognizes and protects small-scale fisheries rights, including:

- Appropriate legal, regulatory and policy frameworks.
- Specific initiatives to support small-scale fisheries.
- Related institutional mechanisms which allow for the participation of small-scale fisheries organisations in relevant processes.

36. Small-scale fisheries, which account for at least 40 percent of the total inland and marine capture fisheries production, play a fundamental role in food security and poverty eradication, underpinning the livelihoods of those who are often most vulnerable in society. It is estimated that almost 500 million people depend at least partially on small-scale fisheries for their livelihoods. Supporting their access rights has parallel efficiencies for SDG 1 – No poverty, SDG 2 – Zero hunger, SDG 5 -Gender equality, and SDG 16 – Peace, justice and strong institutions.

37. The Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries (SSF Guidelines), which celebrated their 10th anniversary in 2024, remain a global reference instrument for action.

38. The International Year of Artisanal Fisheries and Aquaculture 2022 was declared by the United Nations General Assembly to enhance global awareness and understanding of small-scale artisanal fisheries and aquaculture; foster action to support its contribution to sustainable development; and promote dialogue and collaboration between and among actors and partners, engaging key public and private stakeholders to address challenges and opportunities for SSF and aquaculture to contribute to achieving the SDGs. It provided a critical moment to advance efforts to support small-scale fisheries and share related learning.

III. TRANSFORMING AQUATIC FOOD SYSTEMS BY LEVERAGING INTERLINKAGES BETWEEN SDG 14 AND OTHER SDGS

39. FAO's vision on Blue Transformation can contribute to meeting the twin challenges of food security and environmental sustainability. Blue Transformation proposes a series of actions designed to support the resilience in aquatic food systems and ensure that fisheries and aquaculture grow sustainably while leaving no one behind. Climate- and environment-friendly policies and practices, as well as technological innovations, are critical building blocks for Blue Transformation.

40. FAO addresses the linkages of SDG14 with other 2030 Agenda targets, particularly under SDG 1 – no poverty, SDG 2 – zero hunger, SDG 5 – gender equality, SDG 8 – decent work and economic growth, SDG 10 – reduce inequality, SDG 12 – responsible consumption and production, and SDG 13 – climate action.

41. Millions of lives and livelihoods are supported by aquatic food systems, yet many small producers, especially women, are vulnerable with precarious working conditions. Building their resilience is key to sustainable and equitable development (SDG 1, 5, 8, 10). FAO is working to promote equitable access to resources and services enhance the livelihoods of fishers and fish workers, and increase their capacity to access social protection, tenure rights, decent working conditions, and safety at sea.

42. The world's consumption of aquatic food increased significantly in recent years and will continue to rise (SDG 2, 3, 13). Estimated annual per capita aquatic food consumption grew globally from 9.1 kg in 1961 to 20.6 kg in 2022, and the sector will play an increasingly important role in providing food and nutrition in the future.

43. Aquatic foods are irreplaceable and essential to developing countries, they have a low carbon footprint, high feed conversion efficiency, and represent a highly diverse source of animal protein, with essential micronutrients that are difficult to find in other foods. Under this key area of work, FAO leverages its extensive expertise and knowledge to ensure aquatic foods make a significant contribution to food security. This is achieved through various means including introducing fish into school feeding programmes to provide children with nutritious food options; enhancing consumers' access to healthy and safe foods by setting food safety standards through the Codex Alimentarius and promoting the inclusion of aquatic foods in food and nutrition policies, creating pathways to address malnutrition in all its forms.

44. Sustainable and efficient use of inland and marine aquatic resources is key for responsible consumption and production (SDG 12). FAO also focuses on enhancing the efficiency of value chains to minimize fish waste and loss, on improving aquatic health management, biosecurity and traceability for efficient food systems, with reduced environmental impact. Notable examples of this commitment are the recent endorsement of the FAO Guidelines of the Sustainable Aquaculture, the designation of four new FAO reference centres on AMR and Aquaculture biosecurity, and the recent production of the FAO guidance to advance end-to end traceability, addressing critical needs throughout the aquatic food value chains.

45. Empowering communities by supporting small-scale fishers and their organizations (SDGs 5, 8 and 10), FAO is at the forefront of efforts aimed at reducing inequalities and promoting economic growth, leaving no one behind, particularly through FAO-led global initiatives, such as the International Year of Artisanal Fisheries and Aquaculture (2022), which has significantly promoted the implementation of the SSF guidelines and their principles, and through researches like the Illuminating Hidden Harvest report aimed at shedding light on the invaluable contribution of small-scale producers to local economies and food security, as well as on the importance of their perspectives in informing policy-making processes and programs.

46. FAO considers that more can be achieved if we are collectively more targeted in guiding future ocean action, for the sector to be more productive, resilient, sustainable, equitable and contribute further to food security, nutritional outcomes and livelihood support.

IV. MOBILIZING ALL ACTORS AND INVESTMENT TO ACCELERATE AQUATIC FOOD SYSTEM TRANSFORMATION

47. The challenges facing aquatic food systems are significant and interlinked – including poverty and hunger, as well as inequality and lack of access to resources and income-earning opportunities, climate change, loss of biodiversity, ecosystem degradation, disasters, and conflicts.

48. Partnerships are at the heart of FAO's mission to help build consensus for a world without hunger and tackle challenges threatening the ocean and aquatic life, such as climate change, pollution, and ecosystem degradation. Specific strategies are elaborated to optimise relations with various stakeholder groups.

49. FAO is streamlining its partnership efforts through the Blue Transformation roadmap, currently being implemented as a pathway to maximize the contribution of aquatic food systems to achieving the SDGs in an integrated way. To this end, FAO leverages several implementation modalities, including South-South and Triangular cooperation programmes and partnerships with other stakeholders, including UN agencies, academia, non-governmental organizations (NGOs), civil society, and the private sector.

50. The Third UN Ocean Conference, to be convened in Nice, France from 9–13 June 2025 is an opportunity to accelerate action, strengthen partnerships, and mobilize all actors in achieving SDG 14 to conserve and sustainably use the ocean.

51. Aquatic Food systems, encompassing fisheries, aquaculture, and associated value chains, play a pivotal role in global food systems. As the demand for aquatic food continues to rise, sustainability challenges within these systems are to be addressed. Transforming Aquatic Food systems is crucial not only for environmental reasons but also as a strategic imperative to enhance global food systems' economic, environmental, and social sustainability in particular for developing countries.

52. Aquatic/Blue Foods were identified as priorities in national pathways of 73 countries (66 percent) at the UN Food Systems Summit. Of the countries that prioritized aquatic/blue Foods in their pathways, 24 indicated finance and investment as a means of implementation⁴.

53. However, the mobilization of finance for the sustainable development of the aquatic food sector is hindered by:

- a lack of sufficient awareness and understanding of the potential economic and social benefits of investing in the aquatic food sector;
- limited access to financial resources among small-scale fishers and fish farmers, particularly in developing countries or marginalized communities who may not have the collateral or credit history required to obtain loans or investments;
- a need for high upfront investments for infrastructure, such as fish farms, hatcheries, or processing facilities, which increases perceived risk;
- inadequate or inconsistent policies and such as unclear property rights, inadequate licensing processes, or conflicting regulations that create uncertainty for investors;

⁴ UN Food Systems Coordination Hub, accessed 25 May 2023: www.unfoodsystemshub.org/member-state-dialogue/national-pathways-analysis-dashboard/en

- market uncertainties to price variations, demand fluctuations, and competition create uncertainty about the viability of ventures; and
- and finally, the aquatic food sector is highly vulnerable to climate change, pollution, and environmental degradation, which can increase the perceived financial risks associated with investments in the sector, making it less attractive for potential financiers.

54. The high and growing prevalence of hunger and malnutrition in all its forms in the world, combined with climate and environmental concerns, suggests that the global food system is failing to deliver safe, nutritious, sustainable, and equitable diets.

55. Aquatic food systems can make meaningful contributions to food security and nutrition, help prepare for and buffer the impacts of climate change, and sustainably increase the supply of nutritious food and contribute to community resilience, decent employment, equity, gender equality, and poverty alleviation.

56. Aquatic foods provide significant export revenue for many developing countries and play a vital role in the food and nutrition security of many millions of people, particularly vulnerable coastal populations. In addition, the sector supports about 59 million of jobs in the primary sector, and 600 million livelihoods.⁵

57. According to recent scenarios developed by FAO, aquatic food production for human consumption could increase up to 58 percent by 2050 compared to 2020 with major growth principally met by aquaculture intensification and expansion,⁶ which is the fastest growing food production sector. In the medium term, FAO projects that aquaculture production will reach 111 million tons by 2032, a growth of 22 percent (20 million tonnes) compared with 2021.⁷ However, aquaculture expansion in LDCs remains limited. Constraints include the high capital investment needed for equipment, access to brood stock and feed, lack of technical capacity, and financial uncertainty.

58. In Sub-Saharan Africa (SSA) in particular, the demand for aquatic foods is anticipated to witness a significant increase in the coming decades, driven by strong population growth and economic development. However, based on current trends, the growth of aquaculture and fisheries production in SSA is not on pace to match future demand. In the region, total fisheries and aquaculture production is expected to increase by 11 percent by 2032 compared with 2021, with aquaculture expected to grow by 10 percent.⁸

59. Already a net fish importer, the region is projected to see an increase of 22 percent in imports of aquatic foods by 2032 compared with 2021, leading to imports representing a share of 41 percent of total aquatic food consumption in 2032. Yet, the increase of production and imports will not be sufficient to compensate the growth of population, hence an overall decline in per capita consumption of aquatic food in the region from 9.0 kg in 2021 to 8.3 kg in 2032⁹ is anticipated.

60. Aquaculture needs to expand beyond the existing annual growth rate to fulfil anticipated demand and diminish reliance on imported aquatic foods. Immediate government backing and investment are essential for promoting sustainable growth in the sector.

⁵ FAO 2022. *The State of World's Fisheries and Aquaculture 2022. Towards Blue Transformation*. Rome, FAO. <https://doi.org/10.4060/cc0461en>

⁶ UN Nutrition. 2021. *The role of aquatic foods in sustainable healthy diets*. Discussion paper. Rome. www.unnutrition.org/wp-content/uploads/FINAL-UNNutrition-Aquatic-foods-Paper_EN_.pdf

⁷ *OECD-FAO Agricultural Outlook 2023-2032*, OECD Publishing, Paris, <https://doi.org/10.1787/08801ab7-en>

⁸ *ibid.*

⁹ *ibid.*

61. The imperative to transform the aquatic food system into climate-resilient, integrative, equitable, and sustainable long-term systems is paramount, extending across every corner of the planet, and particularly in SSA.