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ASIA-PACIFIC FISHERY COMMISSION

Executive Committee

Seventy-sixth Session

Manila, Philippines, 21-23 February 2017

APFIC INTER-SESSIONAL ACTIVITIES IMPROVING MONITORING OF TRENDS AND ISSUES

REPORT ON THE STATUS AND POTENTIAL OF FISHERIES IN ASIA AND THE PACIFIC 2016

Summary of the regional overview on status and trends of aquaculture in Asia and the Pacific

1. As part of the regular reporting to the APFIC members the Secretariat have carried out a review of the status and trends of aquaculture in the Asia Pacific region. The regional overview focuses on the performance of aquaculture in the APFIC region from 2012-2014, with available FAO fisheries statistic datasets as the main source of data; while looking at the status and trend of the region's aquaculture in longer-term. The overview covers not only the overall regional status and trends of aquaculture, but also analyzes the performance of different commodity groups at the subregional level. The overview also attempted to identify major current and emerging issues affecting future sustainable growth of aquaculture industry in the region.

2. The total aquaculture production (includes aquatic plants) from the APFIC region reached 92.3 million tonnes in 2014. The figure represents a 12.7 percent increase over 2012. Aquaculture production from APFIC region represents 91.3 percent of the world total in 2014. The average annual growth of production in 2013 and 2014 was 6.2 percent, slightly lower than the average annual growth (6.5 percent) during the last 10 year. Notably, the total aquaculture from the region increased by 3.8 percent only 2014.

3. Among all the major aquaculture groups, aquatic plants achieved the highest production increase, 16 percent between 2012 and 2014, follow by finfish (12.6 percent), crustacean (9.5 percent) and mollusk (8.7 percent).

4. Production wise, seven countries rank within the top 10 global aquaculture producers in 2014, which are respectively China, Indonesia, India, Vietnam, Philippines, Bangladesh and Republic of Korea. China is still the largest aquaculture producer in the world, which contributed 63.7 percent of the region's total. Its production growth slowed down to moderately 4.5 percent/year between 2012 and 2014. Indonesia achieved annual production growth of 25 percent. But the growth was largely from farmed seaweed production. India and Bangladesh achieved the production growth above the regional average. Several major aquaculture producers in the region suffered significant production decline (ranging 4-13 percent/year), which include Thailand, Malaysia and the Philippines.

5. Among the total aquaculture production from the region, aquatic animals totaled 65.1 million tonnes in 2014, which represents 70.6 percent of the total production. The total production of farmed aquatic plants reached 27.1 million tonnes in 2014, which represents 29.4 percent of the total aquaculture production from the region. As comparison, farmed aquatic plants represented 25.4 percent of the total aquaculture production in the region in 2004.

6. The major current or emerging issues that can have significant impact on sustainable growth of aquaculture industry are identified as below:

- How to more effectively prevent and control disease outbreaks at farm level;
- How to maintain environmental health in aquaculture areas
- How to sustainably use feed and feed ingredients
- How to strengthen the farmers and the industry to effectively address the issues related to climate change adaptation and mitigation
- How to develop more inclusive aquaculture value chains for equitable benefit sharing among the stakeholders, particularly the small producers

7. The draft regional overview on status and trends of aquaculture in Asia and the Pacific is provided as Information Document EXCO/17/INF.05. The regional overview will be further revised for FAO publication.

Summary of the regional overview on status and trends of capture fisheries in Asia and the Pacific

8. As part of the regular reporting to the APFIC members the Secretariat have carried out a review of the status and trends of capture fisheries in the Asia Pacific region. A draft of the review is presented in the Information Document EXCO/17/INF.05. The paper reviews: the sector's contribution to national economies, trade, employment and food and nutrition; production trends; a snapshot of the fishing fleet; production by species group; and subregional trends. The highlights from the analysis are provided below.

9. In terms of the overall, trends global marine capture fisheries production continues to remain relatively stable in the region. The Region continues to be the world's largest producer of fish and represents 61 percent of the global production (61 percent of marine water and 66 percent of inland waters). In 2014, the marine capture fisheries production in Asia and the Pacific reported its highest catch ever at 50 million tonnes, (and 29 million tonnes without China). This was largely due to the growth of the South East Asian production in the recent years.

10. The total inland capture production excluding China was the highest recorded volume in history; indicating a remarkable growth of 44 percent from 3.2 million tonnes in 2004 to 5.7 million tonnes in 2014, mostly due to the increase of production in the South East Asian subregion.

11. In 2014, approximately 3.5 million fishing vessels were reported in Asia and 8.6 thousand vessels in Pacific and Oceania, accounting for 75 and 0.2 percent of the global fleet respectively. In Asia and the Pacific region, China is the largest fishing fleet nation, 1 million vessels in 2014, followed by Indonesia (0.81 million vessels), the Philippines (0.47 million vessels), and Australia (0.32 million vessels). The number of registered fishing vessels in the region has increased from 3.3 million in 2010 to 3.5 million in 2014. The picture varies according to country and some have been reducing capacity. Japanese authorities for example have implemented various schemes to regulate its fishing fleets, as well as the impact of the 2011 Tohoku earthquake and tsunami resulted in substantial reduction in the number of vessels from 0.3 million vessels in 2010 to 0.08 million vessels in 2014.

12. The marine and inland fishery sector continues to make a significant contribution to national economies and the food and nutrition security of many rural and coastal communities in the region, especially those in the Pacific or least developed countries (LDCs). The contribution to GDP is significant in Pacific States but also in many south east and south Asian countries.

13. Fisheries products¹ remain one of the most traded food commodities worldwide. Trade generates employment along the supply chain and contributes to the economic growth of the countries. Seven states of Asia and the Pacific rank in the top ten importing and exporting country in the world. China remains the biggest exporter of fisheries commodities in the world. These exported products are increasingly produced from aquaculture and focused on export-oriented products. The USA remains the biggest importing country in the APFIC region.

14. The Asia Pacific region accounted for 84 percent of total global number of persons engaged in fisheries production (total 56.6 million). China, the country with the highest number of fishers, had an estimated 9.9 million engaged in capture fisheries in 2014, accounting for 24 percent of the world's total and 38 percent of the total number of fishers in selected Asia and Pacific countries.

15. Fish remains a key source of animal protein, accounting for about 17 percent at the global level, but exceeding 50 percent in many least developed countries. In the Asia Pacific region, the Pacific states reported the highest per capita levels of fish consumption (Tuvalu with 110.7 kg per capita per year). In South East Asia, Cambodia reported the highest consumption. In South Asia, Sri Lanka and in North Asia, Bhutan.

16. In 2014, the region's catch composition was dominated by pelagic marine fish (32 percent, 12.6 million tonnes), followed by demersal marine fish (19 percent, 7.7 million tonnes), marine fish nei (18 percent, 7.0 million tonnes), freshwater and diadromous (16 percent, 6.2 million tonnes), crustaceans (6 percent, 2.5 million tonnes), cephalopods (4 percent, 1.6 million tonnes), molluscs excluding cephalopods (4 percent, 1.5 million tonnes), and aquatic plants (1 percent, 0.2 million tonnes).

¹ Trade and nutrition statistics include both aquaculture and capture fisheries derived commodities.

17. The catch of pelagic marine fish in Asia and Pacific region peaked at 13.7 million tonnes in 1988 and declined to around 11 million tonnes where it has been relatively stable between late 1990s and early 2000.

18. Freshwater and diadromous species recorded the most prominent increase during the past decade (+ 34 percent), whereas molluscs excluding cephalopods was the most reduced species group (- 5%).

19. This regional review will be further revised for FAO publication.

REPORTING ON THE IMPLEMENTATION OF THE CODE OF CONDUCT FOR RESPONSIBLE FISHERIES

20. One hundred and fourteen FAO Member Countries and the European Union (EU)¹ participated in the 2015 edition of the questionnaire on the implementation of the Code of Conduct for Responsible Fisheries (the Code) and related instruments; representing 58 percent of FAO Members. This shows a 20 and 107 percent increase in respondents compared to the 2013 and 2011 editions, respectively. Twenty-five Regional Fishery Bodies (RFBs) and 10 Non-governmental Organizations (NGOs) also took part in the questionnaire.

21. The CCRF Questionnaire covers the following ten areas:

- The relevant of the Code's ten objectives
- Fisheries management plans and measures in Member countries
- Countries' measures to control fishing operations within and outside their Exclusive Economic Zone (EEZ)
- Aquaculture development in Member countries
- Integration of fisheries into coastal area management
- Post-harvest practices and trade
- Fisheries research
- Implementation of International Plans of Action (IPOAs) and Agreements
- Constraints and suggested solutions
- Small-Scale Fisheries

22. A brief summary of the responses of 17 APFIC Members and consolidated statistical tables summarizing APFIC Member responses to the 2015 questionnaire are available the information document EXCO/17/INF.06.

23. The APFIC secretariat requests guidance regarding how this consolidated information and more detailed country-level responses should be analyzed and distributed to inform on advances in fisheries management in the APFIC countries and to assist countries in their reporting on the Sustainable Development Goals.

MONITORING OF IUU FISHING

24. The report of the 32nd Session of COFI (2016) The Committee supported the development of technical guidelines on methodologies and indicators by FAO for the estimation of the magnitude and impact of IUU fishing. It also called for the reliable periodic estimates of IUU fishing, including at the regional level. The review of studies estimating IUU and the methodologies utilized highlighted that:

- there are many different methodologies being used to estimate IUU catch but many estimates are not robust and methodologies not consistent;
- estimates of global “missing catch” made in some studies include catch that is not necessarily IUU in terms of the definitions in the IPOA-IUU;
- developing an updated global estimate of IUU catch may have limited benefit due to wide confidence intervals and a lack of clarity over IUU behaviors included;
- indicators of IUU fishing to monitor progress in combatting IUU fishing need not necessarily include global estimates of volumes of IUU fish, and could focus on other aspects such as numbers of vessels on IUU fishing vessel lists, the number of countries on the EU IUU ‘yellow’ and ‘red card’ lists, and selected regional or local estimates of IUU fish catch based on repeatable and robust methodologies; and
- FAO might play a role in supporting the development of technical guidelines, both on methodologies for estimating IUU catch, and on how to conduct risk-based assessments of IUU fishing.

MONITORING THE IMPLEMENTATION OF THE VOLUNTARY GUIDELINES FOR SECURING SUSTAINABLE SMALL-SCALE FISHERIES

25. The Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of National Food Security and Poverty Eradication (SSF Guidelines) were endorsed in June 2014 by COFI 31. The Thirty-third Session of the Asia-Pacific Fishery Commission (APFIC) requested the development of ways to monitor the implementation of the SSF Guidelines.

26. Since the APFIC region is home to the majority of the world’s small-scale fishers, there is a challenge to APFIC member countries to effectively monitor the implementation of the voluntary guidelines. In many countries specific actions are taking place that are in line with the guidelines and it is important that ongoing or planned national actions are reported back to APFIC and FAO.

27. The SSF Guidelines contain 74 recommendations concerning obligations of the State (“States should”) and these could be considered the points to monitor. This is likely to be too many and since they are thematically linked, it may be preferable to report on general actions rather than the specific recommendations. Reducing these to the major headings in the VG-SSF to enable reports on actions taken that respond to recommendations within the themes of:

- a. Responsible governance of tenure
- b. Sustainable resource management
- c. Social development, employment and decent work
- d. Value chains, post-harvest and trade
- e. Gender equality
- f. Disaster risks and climate change
- g. Policy coherence, institutional coordination and collaboration
- h. Capacity development

28. An FAO SSF Umbrella Programme to support the implementation of the guidelines has been developed and one project has been initiated under this Umbrella programme with support from the Government of Norway. Activities planned under this project include work

to develop technical guidance on the monitoring of VG-SSF implementation. A workshop on this is expected to take place later in 2017.

29. In addition, on September 25th 2015, countries adopted “a set of goals to end poverty, protect the planet, and ensure prosperity for all as part of a new sustainable development agenda” (i.e. the Sustainable Development Goals – SDG). Each SDG has specific targets to be achieved over the next 15 years, including one relating specifically to small-scale fisheries:

SDG 14 - Target 14b: Provide access for small-scale artisanal fishers to marine resources and markets.

30. FAO is proposed as ‘custodian’ UN agency for the indicator for this target. As a custodian agency, FAO will be responsible for:

- Collecting data from national sources, validating and harmonizing them, estimating regional and global aggregates and making them available for international reporting.
- Contributing to annual SDG progress reports, feeding into the High-Level Political Forum’s follow-up and review processes. Flagship publications are set to broaden their scope to include both a storyline and statistical annexes on relevant SDG indicators under FAO custodianship.
- Establishing partnerships with other international agencies to monitor the increased number of indicators, crucial to achieving interrelated goals.

31. The following **indicator** is proposed for target 14b:

Progress by countries in the degree of application of a legal/regulatory/policy/institutional framework which recognizes and protects access rights for small-scale fisheries.

32. This indicator would be derived from the answers of questions 45, 46 and 47 of the COFI CCRF questionnaire:

- CCRF Q45. Are there any laws, regulations, policies, plans or strategies that *specifically* target or address the small-scale fisheries sector?
- CCRF Q46. The Voluntary Guidelines for Securing Sustainable Small-scale Fisheries in the Context of Food Security and Poverty Eradication (SSF Guidelines) were endorsed by COFI in June 2014. Does your country have a specific initiative to implement the SSF Guidelines?
- CCRF Q47. Does your country have mechanisms through which small-scale fishers and fish workers contribute to decision-making processes?

33. The unit of measurement of the indicator would be a score on a scale of 0 to 1, computed through scores and weights assigned to the three questions. The weight given to each of the variables in calculating the indicator value for each country are proposed as follows:

Variable 1 – 40%

Variable 2 – 30%

Variable 3 – 30%

34. The consolidated statistical tables summarizing APFIC Members’ responses to the 2015 CCRF questionnaire, including those relating to the SSF, are available the information document EXCO/17/INF.6. A brief summary of SSF-related responses of 17 APFIC Members is provided below.

35. Small-scale fisheries are legally defined by almost one quarter of APFIC Members and about one third more has informally defined them. The vast majority of APFIC Members intend to review the existing definitions through a multi-stakeholder process and half of the APFIC Members intend to develop a definition through a similar process. Most countries which have defined small-scale fisheries collect data (production, employment, trade, consumption) on the sector. Regulations (62%), policies (77%), laws (62%), plans or strategies (77%) specifically addressing small-scale fisheries have been introduced in many APFIC countries.

36. Almost 40% of the responding APFIC Members have specific initiatives to implement the Voluntary Guidelines for Small Scale Fisheries (VGSSF), which mainly comprise support to resources management-related activities and capacity development of fisheries organizations and other stakeholders, together with promotion of social development, employment and decent work. The most prominent constraints encountered by APFIC Members in implementing such initiatives were lack of financial resources and technical skills, limited public awareness and lack of qualified human resources. The involvement of small-scale fishers and fish workers in fisheries management decision-making processes has been commonly introduced by APFIC Members, in conjunction with the implementation of such initiatives. Mechanisms through which small-scale fishers and fish workers can contribute to decision making processes are in place in most APFIC countries responding and many of them include the promotion of the active participation of women.

37. As for the Seventy-fifth Session of the APFIC Executive Committee, the Secretariat recommends that the request to develop of ways of monitoring the implementation of the Voluntary Guidelines action be postponed until technical guidance becomes available from FAO.

38. The Secretariat invites guidance on APFIC activities in support of Members implementation of the VG-SSF, such as a regional technical workshop.

39. The Secretariat invites comments on the proposed indicator for the SDG 14 - Target 14b "Provide access for small-scale artisanal fishers to marine resources and markets".

SUGGESTED ACTIONS BY THE EXECUTIVE COMMITTEE

40. The Executive Committee is invited to:
- a. Review these four areas of work for improving information as requested by the Commission
 - b. Propose modification to the methods or activities if appropriate
 - c. Suggest how the APFIC Secretariat might follow-up with regional partners, or develop specific initiatives to increase the impact of the work.