

FISHERIES PRODUCTION

Chile's fisheries and aquaculture production drops sharply

Accumulated seafood landings through June 2015 totalled 1.5 million tonnes, 24.6 per cent less than in the first six months of 2014, when 2 million tonnes had been landed.

According to the latest Report on the Fisheries and Aquaculture issued by the Undersecretariat of Fisheries and Aquaculture (SUBPESCA), the fishing sector contributed 1.1 million tonnes, of which 81.2 per cent were composed of pelagic resources.

Sardine, anchovy and horse mackerel respectively accounted for 31.1 per cent, 31.4 per cent and 21.1 per cent of the capture sector landings accumulated until June 2015.

These landings were concentrated in regions V and X (62.1 per cent of the total); regions XV and II (29.2 per cent); and regions III and IV, which accounted for 8.7 per cent of the landings.

The cumulative anchovy landing up to June reached 279,200 tonnes, 38 per cent less than in the same period of 2014.

The main landing fraction was reported in regions XV to II, with 215,300 tonnes, accounting for 77.1 per cent of the total anchovy landings.

Meanwhile, total horse mackerel landings in the sixth month of this year ranges around 187,500 tonnes, 21 per cent less than in the same six-month period in 2014.

The main landing area was between regions V and X, with 123,400 tonnes (65.8 per cent of the total).

As to catches of demersal fisheries, as of June 2015 a total of 5,720 tonnes of southern hake was landed, 13.7 per cent less than in the same period in 2014 (6,630 tonnes).

The main contribution came from the artisanal fleet, with 3,600 tonnes, while industrial vessels landed 2,100 tonnes.

SUBPESCA also reported that the landing of hake accumulated up to June this year totalled 9,000 tonnes, 18.7 per cent less than in 2014 (11,080 tonnes).

Patagonian toothfish landings reached 1,410 tonnes up to June 2015, 10.1 per cent more than in the first six months of 2014 (1,280 tonnes).

Between January and June 618 tonnes of golden kingklip

were landed, compared to 520 tonnes in the same period last year (18.9 per cent more).

Meanwhile, the National Fisheries and Aquaculture Service (SERNAPESCA) reported that in the first six months of this year aquaculture harvests totalled 433,950 tonnes, which represents a decrease of 29.8 per cent compared to the same period of 2014, when 618,485 tonnes were obtained.

The main resources produced nationally were those of Atlantic salmon, mussels and Pacific salmon, which respectively accounted for 47.5 per cent, 44.6 per cent and 3.4 per cent of the total harvest.

Regions X and XI generated most of the harvest: a total of 299,100 tonnes and 119,700 tonnes, respectively.

Atlantic salmon harvests totalled 205,920 tonnes, 32.8 per cent less than the cumulative volume between January and June 2014 (306,450 tonnes). Most production was from Regions XI (105,800 tonnes) and X (82,200 tonnes).

The harvests of mussels accumulated until June totalled 193,655 tonnes, 2.1 per cent more than in the same period of 2014 (189,735 tonnes). 100 per cent of the harvests came from Region X.

Meanwhile, Pacific salmon harvests totalled 14,750 tonnes up to June 2015, 67.2 per cent less than the volume accumulated in the same period of 2014 (44,920 tonnes). Most of the production came from Regions X (63,400 tonnes) and XI (36,600 tonnes).

Source: FIS (<http://www.fis.com/fis/worldnews/worldnews.asp?monthyear=&day=6&id=78403&l=e&special=&ndb=1%20target=>)

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ORGANIZATIONAL PROFILE

Abobodoumé Co-operative for Fishery Product Traders and Processors

Small-scale fisheries in the Ivory Coast account for nearly 75 per cent of the country's catches. In the capital, Abidjan, the commune of Abobodoumé is the biggest hub for small-scale fish products. With over 2,500 members, the Abobodoumé Co-operative for Fishery Product Traders and Processors (CMATPHA) is the biggest women's fish vendors and fish processors co-operative in the Ivory Coast, and forms part of the National Federation of Fisheries Co-operatives in the Ivory Coast (FENACOPECI).

CMATPHA has its own system for savings and credit. All women regularly contribute a small amount of money, with one receiving the total amount in turn, when a fishing trip needs to be pre-financed, for example, which is a way for women to have a guaranteed access to raw material.

But Ivorian women in fisheries have to face many

challenges like unfit sanitation of the processing sites, poor fish-smoking equipment which forces them to breathe smoke all day long, often with serious health consequences, losses through spoilage of raw material, which has sometimes



been paid for dearly by women.

In the last year, CMATPHA has fought for the voices of women in fisheries to be heard by their local traditional authorities and their national government. Some new fish-smoking equipment has been installed, with FAO support, which enables women to be better protected from the smoke; training, supported by the EU, has been organized so that the sanitary conditions and traceability of artisanally processed fish products is increased, allowing women

to target new markets with their traditionally processed products, at national, regional and even international levels.

A recent seminar looked at how to improve the functioning of women in fisheries' organizations in the Ivory Coast. CMATPHA was taken up as a model. It has generated a data sheet for each member, which has enabled the compilation of a database, as well as personal records for each member, with details of activities and savings accounts. The data sheet provides information on the education level of the woman, the number of children she has, and so on, helping to better understand what the real concerns of women are. The creation of the database has allowed the women to be better accounted for. CMATPHA also plans to create a website to highlight the importance and value of Ivory Coast women in fisheries activities.

VERBATIM

In the tropics, then, sea life is intense, vivid, and infinitely varied.

— RACHEL CARSON
from *The Sea Around Us*

FISHERIES STATISTICS

Fish Trade in Africa: An Update

Despite significant progress, international trade has so far not served as an effective tool for the achievement of rapid and sustainable economic growth and development for many African countries. Promotion of intra-regional trade constitutes an imperative response to challenges facing Africa and will contribute to enhancing the countries' capacity and getting them ready to compete more effectively on international markets.

World production and overall trends

Over the past decade, world capture-fisheries production has remained stable at around 90 mn tonnes per year. In 2010, Africa contributed 7,597,427 mn tonnes, or 9 per cent of global caught supply, representing a regional increase of 6.8 times from 1,109,387 tonnes in 1950. In that year, fish catches and aquaculture totalled some 158 mn tonnes, valued at US\$ 217.5 bn.

In 2011, the African total capture-fisheries and aquaculture production dropped slightly to about 8,995,518 tonnes (6 per cent of world total), of which 1,398,091 tonnes came from aquaculture and 7,597,427 tonnes from capture catches. Overall, though, Africa's contribution to world fishery production has grown from 5.9 per cent in 1950 to 8.1 per cent in 2011. This increase has been due to the extension of national exclusive economic zones (EEZs) to 200 miles; higher fishing capacity and technological progress; creation of national industrial fleets; high rate of motorisation of artisanal canoes (61 per cent in Africa) and fishing agreements signed between African countries and others, especially the EU.

Global inland production was estimated at 11.2 mn tonnes in 2010, of which Africa contributed about 2.5 mn tonnes. Uganda and the United Republic of Tanzania are the leading fishing countries in the African Great Lakes region, while Nigeria and Egypt, with

their river fisheries, remain the main producers in Africa.

African import and export trade patterns

Global fish trade has been increasing very rapidly in recent decades. An estimated 45 per cent of the world catch is now traded internationally. The widespread use of refrigeration, and improved transportation and communications, has facilitated this vast expansion of trade, which is an important engine of economic growth and development.

Africa's share in global exports continues to be minor, estimated at US\$4.8 bn in 2011. Expansion of export volumes was primarily due to the growth in exports of fresh, chilled or frozen fish (which constituted over 50 per cent of the total); and, to a lesser extent, prepared and preserved fish and fishmeal. These exports generated fairly low per unit values, but helped drive export revenues due to the large volumes exported. While export volumes of crustaceans and molluscs have remained largely stagnant over the past two decades, they contributed significantly to the growth in export values, generating almost 30 per cent in value in 2006-2008 (compared to 13 per cent in volume).

Main export market: Europe

The top ten African exporters accounted for 89.5 per cent of the total value of fish and fishery products exports from the continent. Morocco (leading with 29 per cent), Namibia (15.8 per cent), South Africa (12.3 per cent), Mauritius (7 per cent) and Senegal (6.3 per cent)—are among the top 50 global fish exporters, with Morocco contributing 1.1 per cent to global trade (1.11 per cent of value) and Namibia around 0.6 per cent. Exports grew from 3.5 per cent in 1980 to around 4 per cent during the early 1990s and then stabilized around 4.6 per cent.

The number one market for the top ten African exporters of fish products is Europe

(70 per cent), followed by Asia (15 per cent), Africa (11 per cent), North America (2 per cent). Oceania and South America are estimated respectively at 1 per cent.

In 2010, Africa's top 10 exporters received between 46 per cent and 92 per cent of their fishery products export revenues from the EU, and Mauritania's share was the lowest due to the importance of their trade on the Japanese market which accounted for around a third of exports (mainly frozen fish and molluscs).

Dependency on the EU market is highest for Madagascar and Côte d'Ivoire where in 2010, France alone imported 83 per cent (mainly shrimp, prawn and processed tuna) and 61 per cent (mainly processed tuna) of the countries' fishery products exports, respectively. Spain was by far the largest EU importer of products from Morocco as well as Namibia, Côte d'Ivoire, South Africa and Mauritania. Spain's imports were almost entirely made up of crustaceans, molluscs and unprocessed fish, with the exception of the products from Mauritius and, to a lesser extent, Côte d'Ivoire. Italy is also an important market in the EU, especially for products from Morocco, South Africa and Tunisia.

Imports: high volume, low value

The continent is an important market for fish, accounting for around 11 per cent of global volume of imports. However, in value terms, African imports were low at around 3.48 per cent of global value in 2010. The top ten importers recorded 82.6 per cent of the total value of imports. Nigeria is the world's fourth largest importer in volume terms (5.4 per cent of global imports) after China, Japan and the US, but only 23rd in value terms or 0.8 per cent. Similar to exports, import volumes grew by some 5 per cent annually between 1976 and 2008, while import values increased at a faster rate of close to 7 per cent on average per year.

Main species and products

Imports are dominated by fish—essentially fresh, chilled and frozen—which accounted for close to 90 per cent of imports on average, over the last decade. The most commonly imported fish has been fresh, chilled and frozen mackerel (almost 40 per cent) and other unspecified frozen fish. Fresh, chilled and frozen fish also accounted for the largest share of import values, although prepared and preserved fish tended to attract a high value (14 per cent in 2006-2008) relative to their share in import volume (5 per cent). Imports of dried, salted and smoked fish remained low, even though they are widely consumed in Africa. The demand is likely met through domestic production which is processed and consumed locally, and/or fresh fish which is imported for processing into dried, salted or smoked products.

Products purchased by the top 10 African fish importers are mainly fresh, chilled or frozen fish. South Africa is the notable exception because crustaceans and molluscs account for a quarter of its imports, while prepared and preserved fish constitute about one-third. The top 10 importers together, account for 90 per cent of Africa's import volumes and 80 per cent in value terms. The main market for fish meal is Nigeria (second biggest cultured fish producer).

Overall, EU countries accounted for just over half of Mauritius' imports. The Seychelles was the largest African supplier (7%) while South Africa and Morocco sold the largest shares of processed products to the island state. South Africa obtained the majority of its imports from Thailand (44%, primarily processed sardines and tuna) while India, the second largest import source, exported mainly crustaceans to South Africa. China was also a fairly important trading partner. South Africa sourced only 5% of products from the African continent.

Source: Amadou Tall, independent consultant

INFOLOG: NEW RESOURCES AT ICSF

ICSF's Documentation Centre (dc.icsf.net) has a range of information resources that are regularly updated. A selection:

Publications

Béné, C., Devereux, S. and Roelen, K. 2015.

Social protection and sustainable natural resource management: initial findings and good practices from small-scale fisheries. *FAO Fisheries and Aquaculture Circular No. 1106. Rome, FAO. 61 pp.*

Using small-scale fisheries as an illustrative case, this publication explores how social-protection interventions can be used to reduce the vulnerability and strengthen the resilience of households and communities that depend principally on renewable natural resources to sustain their livelihoods and food security. It identifies and reviews existing social-protection policies, schemes and instruments with regard to their potential role in supporting the transition to sustainable natural resource management in fisheries, including the identification of universal and targeted social-protection schemes and instruments that fisheries-dependent communities have access to, as well as how these groups are defined within the context of those policies.

By providing an overview of the different sources of vulnerability and concrete examples of exclusion affecting actors in the fisheries sector, this publication also increases awareness of the vulnerability of small-scale fishers and fishworkers to natural and human-induced hazards as well as other social, economic or political risks.

<http://www.fao.org/3/a-i4620e.pdf>

Voluntary Guidelines for Flag State Performance

The Voluntary Guidelines for Flag State Performance seek to prevent, deter and eliminate illegal, unreported and unregulated (IUU) fishing through the effective implementation of flag State responsibilities. The Guidelines are wide-ranging and address the purpose and principles, the scope of application, performance assessment criteria, co-operation between flag States and coastal States, a procedure for carrying out an assessment, encouraging compliance and deterring non-compliance by flag States, co-operation with, and assistance to, developing States with a view to capacity development, as well as the role of FAO. They are expected to provide a valuable tool for strengthening compliance by flag States with their international duties and obligations regarding the flagging and control of fishing vessels.

<http://www.fao.org/3/a-i4577t/index.html>

Videos

India's Disappearing Beaches—A Wake-up Call

This is a non-profit film produced in the public interest by Shekar Dattatri for Pondy Citizens' Action Network (PondyCAN). It explains how erosion takes place and how it is possible to not only prevent man-made erosion but to restore lost beaches through the right measures.

<https://www.youtube.com/watch?v=KgTn6Qpgjok>

FLASHBACK

A Useful Toolkit

Thursday, 14 June 2007, will go down in history as a particularly significant day for fishers and fishworkers all over the world. That was the day the 96th Session of the International Labour Conference (ILC) of the International Labour Organization (ILO) adopted the Work in Fishing Convention, 2007, which seeks to guarantee innovative new labour standards to improve the conditions for millions of men and women working in the fishing sector worldwide.

Adopted in the year of the silver jubilee of the 1982 United Nations Convention on the Law of the Sea, the Fishing



Convention is the first ILO instrument in fishing since the adoption of the 200 nautical mile exclusive economic zone regime by coastal States in the 1970s. This time around, unlike at the 93rd Session of the ILC in

2005, more countries, including China, which accounts for the largest share of fishing capacity and the largest number of fishers in the world, voted for the adoption of the Convention.

The Convention has a three-tier structure. First, all provisions of the Convention, upon its ratification, would apply to fishing vessels above 24 m in length, and fishers working on board such vessels. Second, many of the provisions would apply to the majority of commercial fishing vessels and fishers working on them, regardless of size of the vessel. Third, some of the prescriptive provisions would apply to fishing vessels below 24 m over an unspecified period of time. The latter tier, presumably, applies to industrial fishing operations employing vessels below 24 m.

On the matter of compliance with the requirements of the Convention, the flag States are required to undertake inspections, reporting, monitoring, complaint procedures, appropriate penalties and corrective measures. There are further port-State provisions, albeit weak, to report to the flag State, about non-confirmation to the requirements of the Convention by a fishing vessel that calls at its port, and even to take measures to rectify any conditions on board such a vessel that are hazardous to safety or health. Except for minimum age, the other provisions of the Convention that would apply to the small-scale and artisanal subsector are non-prescriptive; it has been left to the ILO member countries to adopt laws, regulations or other measures to implement them.

— from *Comment in SAMUDRA Report No. 47, July 2007*

ANNOUNCEMENTS

MEETINGS

41st Annual Conference of the International Association of Aquatic and Marine Science Libraries and Information Centres (IAMSLIC): "Blue Growth: Motivating Innovations in Aquatic Information Management"
7 – 11 September 2015, Italy, Rome

The conference will discuss and exchange knowledge and information on the Blue Growth Initiative as well as share the best

practices and innovative ideas in fisheries and aquatic information management.

Meeting of Experts to Adopt Flag State Guidelines for the Implementation of the Work in Fishing Convention, 2007 (No. 188)
21-25 September 2015, Geneva

The Meeting will consider and adopt flag State guidelines for the implementation of the Work in Fishing Convention, 2007 (No. 188). It will be composed of 24 experts—eight nominated by the

Employers' group, eight nominated by the Workers' group of the Governing Body, and eight nominated by the Governments of Argentina, Brazil, Indonesia, Morocco, Namibia, Norway, South Africa and Spain. Should any of the Governments mentioned above decline to nominate an expert, one of the following Governments would be invited to do so: Canada, France, Japan, Mauritius, Panama, Peru, Portugal or Thailand. The Meeting will also be open to interested Government observers. Experts should have practical

knowledge of inspection of living and working conditions on board fishing vessels.

Committee on World Food Security 42nd session
12 – 15 October 2015, Rome, Italy

The 42nd session will focus on making a difference in food security and nutrition. The annotated agenda for the session is available at: http://www.fao.org/fileadmin/templates/cfs/Docs1415/cfs42/cfs_2015_42_1_Provisional_Annotated_Agenda_en.pdf