

# Executive summary

This edition of the *Review of Fisheries* examines developments in the fisheries policies of countries and emerging economies with major fisheries sectors. Its central message is that policies to ensure the long-term viability of fisheries, and to protect and restore ocean resources and ecosystems, can be reconciled with policies to address short-term socio-economic goals. However, policy reforms need to be accelerated if progress is to be made on Sustainable Development Goal (SDG) 14 of the 2030 Agenda for Sustainable Development, which seeks to “conserve and sustainably use the oceans, seas and marine resources for sustainable development”.

An essential target of this goal was to restore all fish stocks “at least to levels that can produce maximum sustainable yield as determined by their biological characteristics” by the end of 2020. This target remains unattained:

- Of the 1 119 stocks for which information was reported by the countries and economies participating in this *Review*, 66% only had a favourable biological status, 23% had an unfavourable biological status, calling for remedial action, while, for the remaining 12%, the status was undetermined, calling for further assessment.
- Within the stocks that had a favourable biological status, 54% were meeting targets based on additional management objectives, such as maximising the volume or the value of catches. Another 13% of these stocks were not meeting such targets; and for the remaining 33%, the status with respect to such targets was undetermined, no such targets were defined or they were not reported.

One reason is that government support remains insufficiently targeted. Governments support their fisheries sectors in order to improve fishers’ welfare, to encourage food production, and to ensure their sustainability. However, some forms of government support – in particular those that lower the cost of inputs – distort the economic environment in which fishers operate, thereby creating excess capacity and leading to overfishing and illegal, unreported and unregulated (IUU) fishing when excess fishing is not entirely controlled. In addition, support policies do not always address socio-economic objectives in an efficient or equitable way.

Over 2016-18, the 39 countries reporting government support data to the OECD together provided average annual support of USD 9.4 billion to the fisheries sector. This represented a gross transfer equating to about 10% of the average value of landings over 2016-18, down from 13.8% in 2012-14. The decrease resulted from a significant reduction in direct support to individuals and companies, which totalled USD 4.6 billion per year, on average, in 2016-18, compared with USD 8.6 billion in 2012-14. An important driver of this trend was a reduction in support to fuel for fisheries in the People’s Republic of China (hereafter “China”) the country with the world’s largest fisheries sector.

The evidence shows significant scope to further re-allocate direct support in ways that would improve the sustainability of the fisheries sector and more effectively and equitably transfer income to fishers:

- Across all countries and economies in the fisheries support estimate (FSE) database, over 2016-18, on average, USD 3.2 billion was spent annually on support that reduces the cost of inputs.

Support to fuel was the single largest direct support policy, accounting for 25% of total support to the sector. These policies tend to encourage over-fishing and be the least effective in transferring additional net income to fishers.

- Less than a third of what was spent to reduce the cost of inputs (USD 1.0 billion) was granted through “partially-decoupled” policies, such as income support and special insurance systems that are more effective in raising fishers’ incomes and less likely to result in over-fishing than support to inputs.
- Between 2012-14 and 2016-18, spending on management, control and surveillance fell substantially relative to fleet size in several countries and economies. This raises questions as to whether capacity for management and enforcement is sufficient. At the same time, spending on infrastructure, such as on port facilities, has increased significantly in some countries and economies, with potential risks of encouraging overfishing where this creates additional capacity for fishing, landing and processing.

The biological sustainability of stocks, and thus the resilience of fisheries, largely depends on the management of fisheries. For this *Review*, information on the management tools in place was collected for 166 situations where measures apply to specific stocks or groups of stocks:

- About two-thirds of these situations directly controlled catches or landings. Almost a third of countries and economies used total allowable catch limits (TACs) in all management situations reported on, while four countries did not use TACs for any of them.
- Slightly over half of countries and economies (57%) used quotas allocated to individuals or communities, six of which did so in all management situations reported on.
- Input controls were used in most of the situations that involved direct controls on the volume of fish caught or landed, in particular restrictions on fishing gear, areas, and harvest capacity. Additionally, about a third of situations involved sets of input controls only.

Illegal, unregulated and unreported fishing (IUU) undermines the effectiveness of management and threatens the sustainability of stocks. Analysing the policies that countries and economies apply in the fight against IUU fishing across six policy indicators shows that:

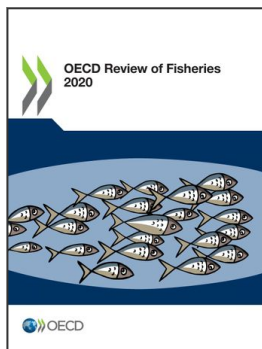
- There has been significant progress over the past fifteen years in fighting IUU fishing, particularly on implementation of port state measures, which were not widely used in 2005, and are now the most widespread of all interventions measured.
- Overall, three areas remain insufficiently implemented: transparency over vessel registration and authorisation processes; the stringency of transshipment regulation; and market measures aimed at increasing traceability and closing access to markets and fisheries services to IUU fishing operators.

Enacting policy changes needed to reallocate support, improve the status of stocks, implement good management and fight IUU fishing requires effective governance systems that integrate data and allow stakeholders to be part of the decision-making process. Reviewing governance across countries and economies surveyed shows that:

- Scientific data were generally used in the governance process, however commitment mechanisms to ensure these data directly influence decision-making were not widely used, with only 28% of countries having harvest control rules that are automatically adjusted based on scientific evidence. Socio-economic data is used less frequently than scientific data.
- In recognition of the importance of stakeholder participation and transparency, advisory groups were used in 84% of countries and economies. Commercial fishers (63% of groups) and scientific entities (52% of groups) were the stakeholders most frequently represented on advisory groups.

## Recommendations

- Governments should move away from policies that support inputs towards those that help fishers operate their businesses more effectively and increase their profits (e.g. through education and training), or that provide direct income support in a way that does not incentivise unsustainable fishing. This would reduce negative impacts on the biological sustainability of fish resources and inequitable effects across fleet segments, while increasing fisher welfare and the quantity of fish produced.
- When allocating public funding for fisheries, governments should also ensure that there is sufficient capacity for management, control and surveillance to effectively manage fisheries, including in the high seas, and to eradicate illegal fishing. At the same time, they should avoid financing infrastructure that encourages overcapacity and overfishing.
- Governments should more actively manage stocks that have an unfavourable biological status as well as those for which there is no direct control of catches or landings, nor notional total allowable catch limits achieved through input controls.
- Governments should manage fisheries more productively where stocks have a status that is biologically favourable, but not sufficient to maximise catch volume or value.
- Governments should review and simplify management measures where they are particularly complex, potentially difficult to implement and monitor, and – in the case where effective output controls are in place – possibly redundant.
- To fight IUU fishing, individual countries and economies should address the regulatory loopholes and policy gaps that comparison with internationally recognised best practices reveals.
- The automatic sharing and recognition of key information among regional fisheries management organisations would support the fight against IUU fishing, while the harmonisation of standards for collecting scientific data and the sharing of best practices for the implementation of technology would improve regional fisheries management.
- Scientific and socio-economic data should be integrated into fisheries governance systems by embedding its use into decision-making (where possible). Investment in data collection and analysis is also required to build a robust evidence base for policy change.
- Transparent mechanisms for stakeholder participation in the governance process (e.g. advisory groups) should be more widely used to build legitimacy for fisheries policy and policy change. Governments should also carefully review and manage the balance of stakeholders in each group, in accordance with the constituencies affected by policy reforms under consideration.



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