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## Overview and key results of the *Review of Fisheries 2020*

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Fisheries have a fundamental role in feeding the global population, and creating jobs and resilience in coastal communities. However, fish stocks must be managed sustainably in order to meet these socio-economic goals while preserving aquatic and ocean biodiversity and the provision of the ecosystem services on which the “blue economy” relies. Based on the latest available data reported by OECD countries and partner economies, the Review of Fisheries 2020 sheds light on how governments are addressing the key challenges faced by their fisheries and suggests priorities for action both at the national level and for the international community. This chapter discusses its main findings.

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Fisheries are fundamental to feeding the global population, and creating jobs and resilience in coastal communities. However, to achieve such socio-economic goals while preserving aquatic and ocean biodiversity and the provision of the ecosystem services on which the “blue economy” relies, fish stocks must be managed sustainably. To ensure fisheries continue to deliver for future generations, in 2015, members of the United Nations (UN) adopted a series of specific targets for fisheries as part of the Sustainable Development Goal (SDG) 14 of the 2030 Agenda for Sustainable Development. SDG 14 seeks to “conserve and sustainably use the oceans, seas and marine resources for sustainable development” and calls for: ending overfishing and illegal, unreported and unregulated (IUU) fishing; restoring fish stocks to sustainable levels and implementing science-based fisheries management; and eliminating subsidies, which contribute to overcapacity, overfishing, and IUU fishing. To reach this last target, members of the World Trade Organization (WTO) are negotiating binding disciplines on fisheries subsidies that would allow countries to collectively prohibit harmful subsidies while taking into consideration appropriate and effective special and differential treatment for developing and least developed countries.

Countries set themselves a deadline of the end of 2020 for achieving these ambitious targets. However, the proportion of fish stocks that are at unsustainable levels has continued to increase globally, albeit at a slower rate than in previous decades. In 2017, about a third of global fish stocks were considered as overfished (FAO, 2020<sup>[11]</sup>). At the same time, IUU fishing continues in many parts of the world, creating excessive pressure on fish stocks, harming law-abiding fishers through unfair competition and thereby reducing their profitability, in addition to limiting employment opportunities throughout the value chain.

The COVID-19 pandemic is imposing additional challenges. The consequences of this pandemic and the public health measures taken in response are creating risks to jobs, incomes and food security, as well as imposing new demands on governments to mitigate the shock to the seafood sector and ensure the smooth functioning of the food system. The pandemic is also complicating regional and multilateral co-operation. High-level meetings and negotiations are being postponed, such as the *UN Conference to support the implementation of SDG 14*, which was to be held in Lisbon in June 2020. Travel restrictions pose challenges to monitoring and surveillance in both domestic and multilateral fisheries (OECD, forthcoming<sup>[2]</sup>; OECD, 2020<sup>[3]</sup>). Beyond the COVID-19 pandemic, climate change continues to have a complex impact on fisheries, increasing the challenges faced by the sector. While not yet fully understood, it is anticipated that climate change will adversely impact fish stocks in many areas, and force changes to fish migration patterns, through impacts on sea-level rise, ocean temperatures, acidification, declining biodiversity and marine ecosystem degradation (Barange et al., 2018<sup>[4]</sup>; Pörtner et al., 2019<sup>[5]</sup>; Gaines et al., 2019<sup>[6]</sup>).

Progress is nevertheless being made in many parts of the world, which is not necessarily captured in global figures. In this context, the *Review of Fisheries 2020* (hereafter, the *Review*) aims to support policy makers and sector stakeholders to accelerate progress towards shared goals and, more generally, guide the transition of global fisheries towards sustainability and resilience. Based on the latest available data reported by OECD countries and partner economies, the *Review* sheds light on how governments are addressing the key challenges faced by their fisheries and suggests priorities for action both at the national level and for the international community.

The key message of the *Review* 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. Economic, equity and environmental considerations all point to similar best practices: supporting fishers in need rather than subsidising fishing inputs or effort, and ensuring that evidence-based management is implemented and enforced by investing in data collection and analysis, using the evidence in decision-making and fighting IUU fishing with comprehensive and transparent regulations and policies.

To help identify the priorities for action at the level of competent authorities, comparable data on the status of fish stocks for individual countries and economies was assembled (Chapter 2). It shows that 23% of the 1 119 stocks for which information was gathered have an unfavourable biological status, calling for

remedial action through better stock management. The data also show scope to manage fisheries more productively where stocks have a status that is biologically favourable, but not sufficient to maximise catch volume or value (or where no such additional objectives exist). This was the case for about half the stocks that were reported to have a favourable biological status (which, themselves, accounted for 66% of all assessed stocks reported on).

New comparable information on fisheries management was also collected for this *Review*. This information suggests there is opportunity for more active management where there is no direct control of catches or landings, nor notional total allowable catch (TAC) limits achieved through input controls. To facilitate the implementation and monitoring of management measures where these are particularly complicated, managers should consider whether some measures may have become redundant following the introduction of output controls. Progressing towards sustainable fisheries also requires improving the evidence base: assessing the status of all stocks of commercial importance – both in terms of biological sustainability and against additional management objectives – then relating these data to the information on management. This would allow further empirical investigation on the effectiveness of alternative fisheries management practices in different contexts.

The fight against IUU fishing is a key part of sustainable fisheries management and a major issue for international co-operation. Evidence shows that rapid, significant and lasting gains are possible, and the measures needed to reap these gains are often more acceptable to fishing communities and the fish industry than are overall fishing restrictions. The *Review* examines the policies that countries and economies apply in the fight against IUU fishing and evaluates the extent to which internationally-recognised best practices in some of the most important areas for government intervention against IUU fishing have been adopted (Chapter 3).

A key finding is that progress has been made since the mid-2000s, with the adoption of stricter regulations, closer monitoring and control, and greater international co-operation. Most notably, port state measures – by which authorities monitor and control activities at port – are today widely used internationally. This was not the case in 2005. Several market measures have also been adopted. For example, all countries and economies surveyed reported they could reject products originating from IUU fishing at the border in 2018, while only 38% of them could do so in 2005. Although registration and authorisation processes already had a relatively high uptake of best practices in 2005, several measures have seen significant recent progress. For example, while in 2005 only 36% of countries and economies surveyed prohibited parallel registration of vessels in more than one country, 93% did so in 2018. Overall, the information collected shows a high variation in take-up of best practices across countries and economies. This demonstrates scope for peer learning and bilateral co-operation between countries and economies at the forefront of the fight against IUU fishing and those who need to reinforce their regulatory arsenals.

In addition, registration and authorisation processes should generally be made fully transparent to facilitate co-operation between governments, across branches of government, and between stakeholders so that they can join forces to better track IUU activities. Only one in five countries and economies surveyed reported properly publishing lists of vessels identified as engaging in IUU fishing, while over half reported not publishing the lists of vessels they authorise to conduct fishing-related activities in the high seas. G7 and G20 countries, which have expressed a shared ambition to curb IUU fishing following conferences in Charlevoix in 2018 and in Osaka in 2019, respectively, could lead the way by making public their vessel registries, lists of authorised vessels, and those vessels that have been identified as engaging in IUU fishing. The issuing of a unique vessel identifier in the registration process should be adopted and harmonised, making use of International Maritime Organization (IMO) numbers whenever possible. A quarter of surveyed countries and economies reported they did not require an IMO number to register fishing vessels and a third did not require one to register vessels conducting fishing-related activities.

Best practices for gathering information on who ultimately controls and benefits from vessel activities (i.e. the “beneficial owners” of vessels) should be identified and promoted. Many countries and economies have a legal framework to do so, but report practical difficulties. The evidence gathered also suggests that the regulations for transshipment (whereby fish are transferred from fishing boats onto larger refrigerated vessels, which then carry the fish to port) should be made more stringent so that products of IUU fishing do not enter the value chain unnoticed during operations at sea. Wider adoption of market measures should be encouraged internationally to increase the traceability in seafood value chains. Measures should also be adopted to close access to markets and fisheries services to operators that engage in IUU fishing. For example, only about one in three respondents has a legal framework mandating tax authorities to cooperate and share information with fisheries authorities to facilitate the detection of illicit proceeds and the identification of nationals who are the beneficial owners of IUU fishing vessels.

To win the fight against IUU fishing and to facilitate the transition to sustainable fishing more generally, governments should stop disbursing support in ways that encourage unsustainable fishing. Indeed, in the pursuit of objectives such as maintaining coastal employment, improving fishers’ welfare, and ensuring the sustainability of an important food sector, some types of support, in particular contexts, can build excess fishing capacity and lead to overfishing and IUU fishing. In addition, some of these support policies do not always address their socio-economic objectives in an efficient or equitable way. For example, support that lowers the cost of fuel can transfer a relatively low proportions of the money to fishers, while reducing the competitiveness of smaller-scale fishers, making them worse off than they would have been without the support (Martini and Innes, 2018<sup>[7]</sup>).

The *Review* updates the OECD fisheries support estimate (FSE) database and presents the most comprehensive, detailed, and consistent collection of country level data on support to fisheries reported by governments. The nature and potential impacts of this support are analysed in Chapter 4. Over 2016-18, the 39 countries which reported 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. This 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, down from 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. Over 2016-18, on average USD 3.2 billion was spent annually on support that reduces the cost of inputs. Across all countries and economies in the FSE database, support to fuel was the single largest direct support policy, accounting for 25% of total support to the sector. At the same time, less than a third of what was spent to reduce the cost of inputs (USD 1.0 billion) was granted in support that was partially de-coupled from fishing activities – such as income support and special insurance systems. Moving towards measures that help fishers to operate their businesses more effectively and profitably (e.g. through education and training), or provide direct income support in a way that does not incentivise unsustainable fishing would reduce the negative impacts on fish resources and increase fishers’ welfare.

When allocating public funding for fisheries, governments should ensure that there is sufficient capacity for management, control and surveillance to effectively manage fisheries, including on the high seas, and to eradicate illegal fishing. At the same time, they should avoid financing infrastructure that encourages overcapacity and overfishing by creating additional capacity for fishing, landing and processing. Between 2012-14 and 2016-18, spending on management, control, and surveillance fell substantially relative to fleet size in several countries and economies, while spending on infrastructure increased significantly in others (sometimes the same countries). To ensure that adequate resources are available to provide essential management services, and in line with the user pays principle, governments should consider requiring the

fisheries sector to fund a proportion of the cost of these services. In many countries, such costs continue to be borne mostly by the taxpayer.

In addition, increasing transparency in government support to fisheries would help build trust in the sector and in policy responses. This is particularly needed with respect to fuel support and payments to access foreign waters, which remain insufficiently documented. Increased transparency would also enable countries to learn from each other's experiences in order to better prepare for the future.

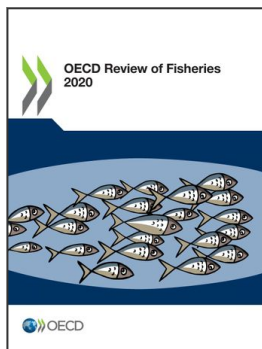
Finally, the *Review* explores how reforms – where needed – can be facilitated by good fisheries governance (Chapter 5). It finds that developing and adopting mechanisms whereby governments commit to reviewing or changing policies based on scientific data would contribute to more timely and acceptable decision making, for example via rules for adjusting harvest controls depending on stock status assessments. Furthermore, socio-economic data should be more directly integrated into decision making to better anticipate and understand the impact of changes to fisheries policy on broader socio-economic outcomes. Transparent mechanisms for stakeholder participation in the governance process, such as advisory groups, should be more widely used, while governments should carefully review and manage the balance of stakeholders in these groups depending on the policy areas they advise on.

In multilateral fisheries, the decision-making processes of regional fisheries management organisations (RFMOs) should be reviewed to find more efficient pathways than consensus-based decisions. Voting mechanisms, combined with objection processes that are limited in scope and automatic reviews of objections, offer a promising approach to representative and efficient decision-making. In addition, the automatic sharing and recognition of key information among RFMOs would support the fight against IUU fishing. Co-ordination when setting standards for collecting scientific data and the sharing of best practices for the implementation of technology could also improve regional fisheries management.

The international community should continue to develop evidence on the types of institutions and mechanisms used to achieve good fisheries governance globally in order to identify opportunities to reform the governance systems of both national and multilateral fisheries, and thereby achieve equitable and sustainable policy outcomes.

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