

Trading away our Oceans

or

Fillets for France, Fish-heads
for the Philippines

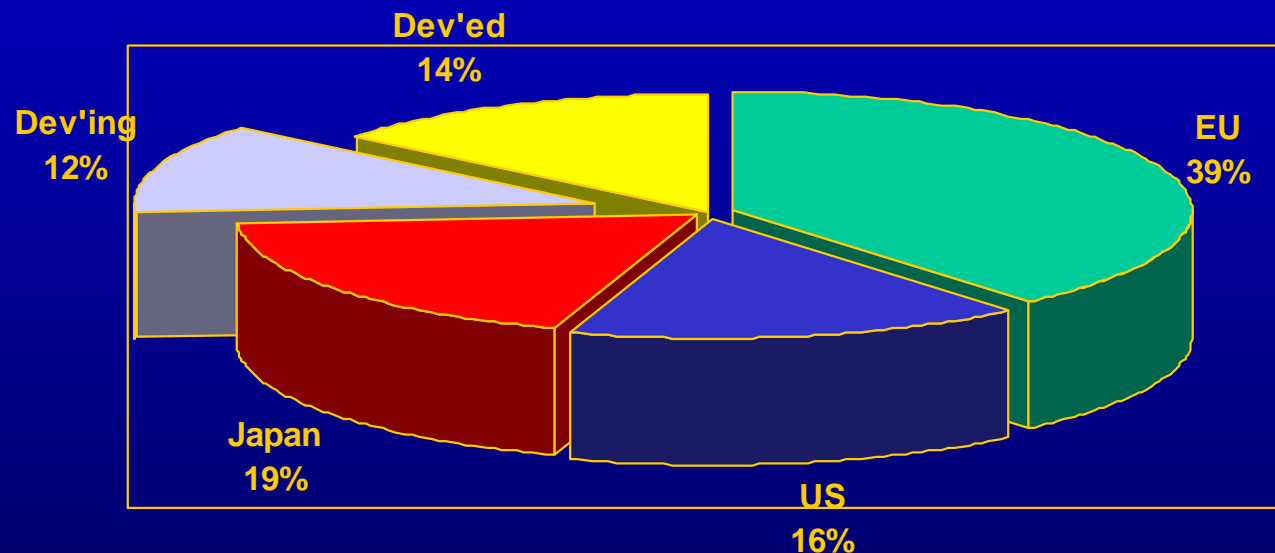
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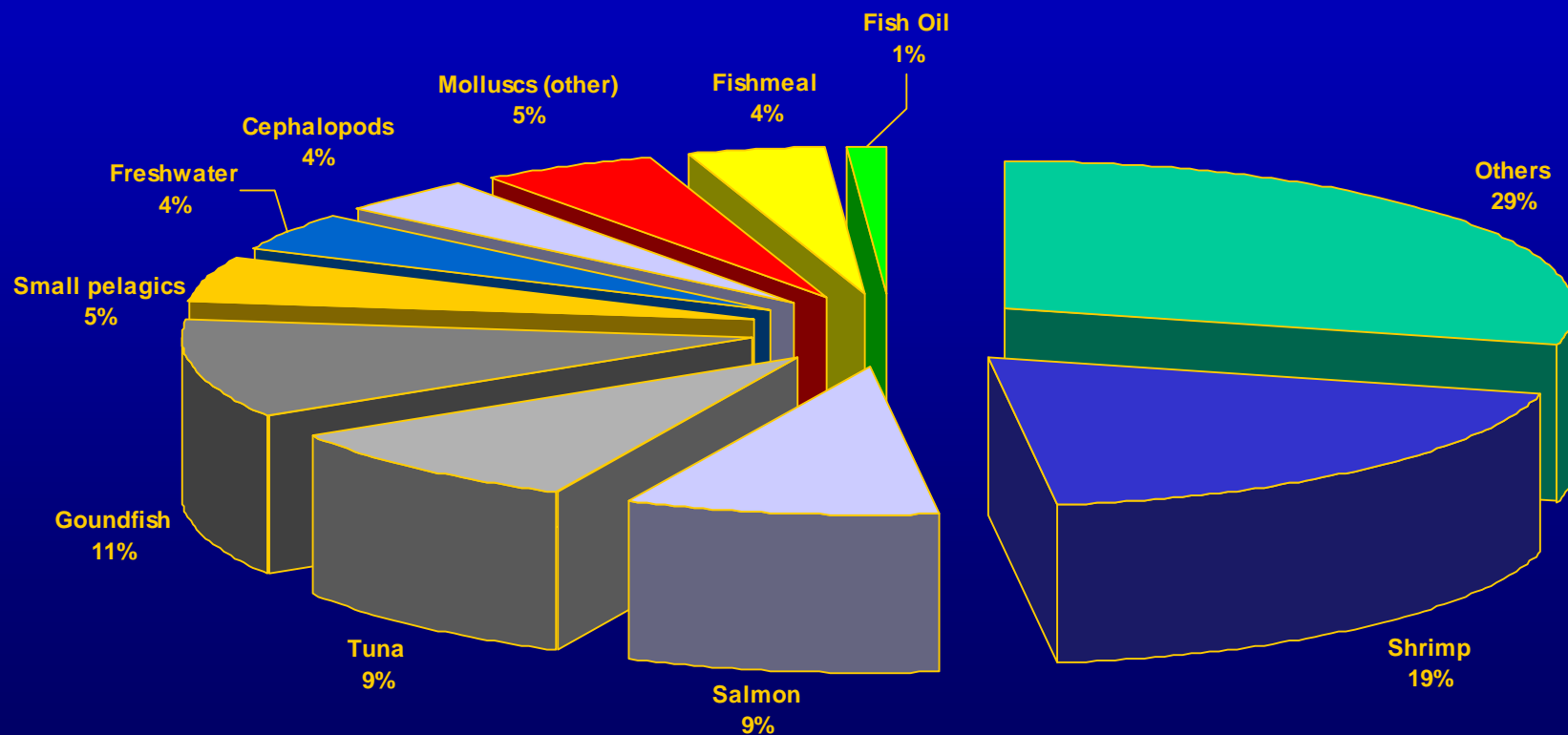
Washington, DC

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Import value distribution Main markets (% 2004)



Main species exported in 2002 (value)



Trade flows

(2002 Export values)

High value species/products flow North
(shrimp, salmon, tuna, grounfish, lobster, octopus)

Low value species/products flow South
(pelagics/fishmeal & oil)

Tariffs in 3 main markets

EU

- MFN average for seafood 12%
- Lots of tariff peaks and tariff escalation

US

- Seafood tariffs much lower than EU, some escalation
- Anti-dumping levies very high (shrimp/catfish/salmon)

Japan

- Seafood tariffs higher than US lower than EU
- Some tariff escalation & peaks
- Import quotas

**What happens
when you cut
tariffs on fish?**



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The theory

- Tariff cuts change price
 - Consumers pay less
 - Producers get paid more
- Price change stimulates supply

BUT, in fisheries, supply can only increase up to maximum sustainable levels -- then what?

- Ineffective management leads to overfishing and depletion

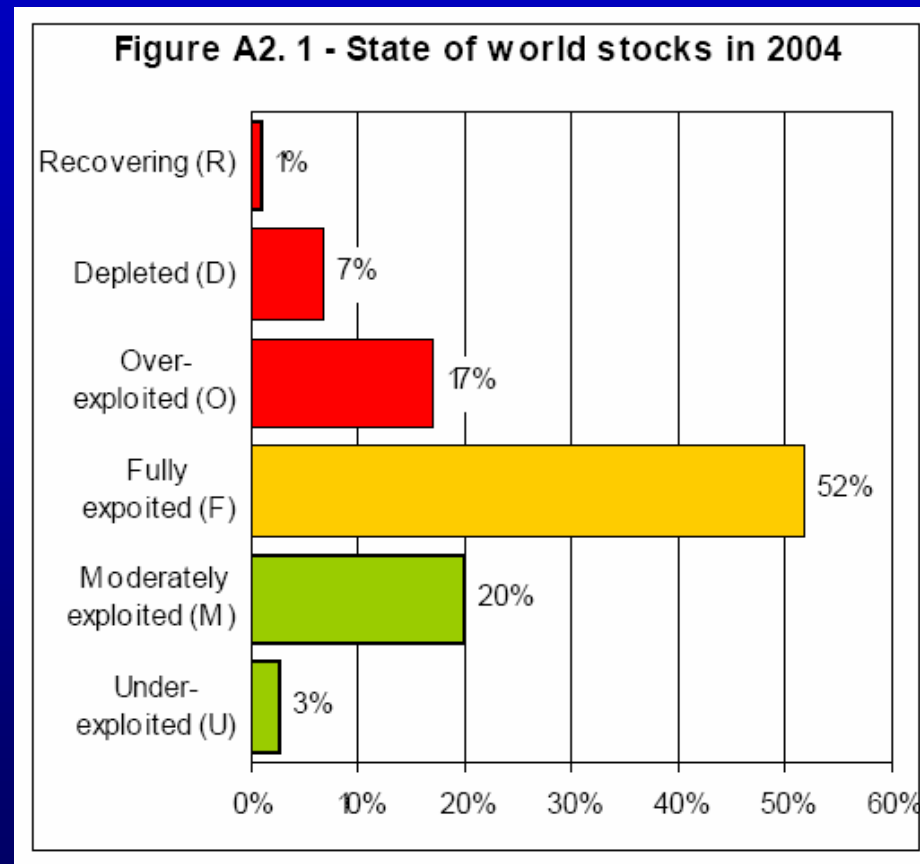
Fish trade liberalization can only bring sustainable benefits if effective fisheries management exists in both exporting and importing countries

Q: How much room is there to increase wild fish production?



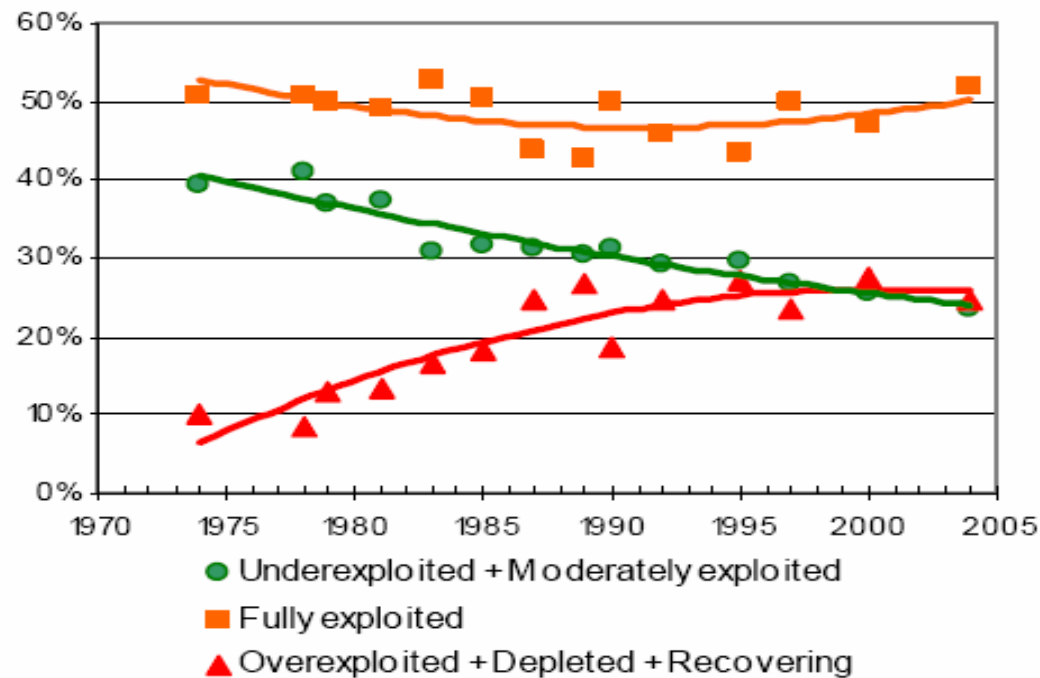
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State of the World's stocks



Long term stock trends

Figure A2.3 - Global trends in world stocks state of exploitation: 1974-2004



The effects of past liberalizations

UNEP case studies: Maritania, Sénégal,
Argentina

Duty free access to
EU for fish exports



Mauritania

Majority of demersal species now over-exploited:

- Shark and ray stocks heading towards extinction
- Previously plentiful species have disappeared from Mauritanian waters
- Discards and dumping so voluminous creating marine pollution problems
- Food security worsening

Government under IFI pressure to sell off fisheries resources to meet minimal economic growth targets.

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Argentina

- Fish agreement signed 1994
- Weak fisheries management => severe overfishing
- By 2002 – 6 Argentine stocks endangered



Senegal

- Duty free access to EU has created a conservation crisis & undermined food security.
 - Catch rates falling for all species but export species especially high -- some threatened with extinction
 - Export species being fished before they reach sexual maturity
 - Offshore 'dragging' has destroyed & changed habitat, eroded biodiversity & induced ecological replacement
 - Quantity & quality of domestic supply diminished
 - Costs to consumers increasing



Boxes for Guinea, Bags for Europe

Conclusions

- Senegal, Mauritania, Argentina are not exceptions in fisheries management
- Developing countries
 - Can't afford effective fisheries management
 - Squeezed by IFIs to increase exports
 - Preyed upon by fishing nations



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Conclusions

- Only handful of fish exporting developed countries will benefit in the long term: Canada, Norway, Iceland, New Zealand
- Short/medium term gains for Thailand
- All others will lose



Conclusions

- WTO must abandon fisheries liberalization
- **Fishing countries must adhere to international conservation instruments starting with responsibility for the actions of its corporations and citizens**





















