

# Better fisheries policies for sustainable food, resilient communities and a healthy Ocean

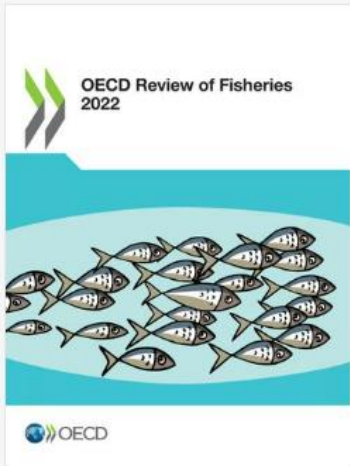
An OECD contribution to the 3rd meeting of the G20 Agriculture Working Group

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Brasilia, June 11 2024



# How can the OECD and its Fisheries Committee help governments develop better fisheries policies ?



Latest Edition

## OECD Review of Fisheries 2022

The *OECD Review of Fisheries 2022* brings together and analyses data on fisheries management and support policies to inform decision makers and help foster sustainable and resilient fisheries that can provide jobs, food, and livelihoods for future generations. The *Review* assesses the he [More](#)

13 Dec 2022 | 124 pages | English | Also available in: French

<https://doi.org/10.1787/9c3ad238-en> | 9789264952935 (HTML) | 9789264775626 (PDF) | 9789264576438 (EPUB)

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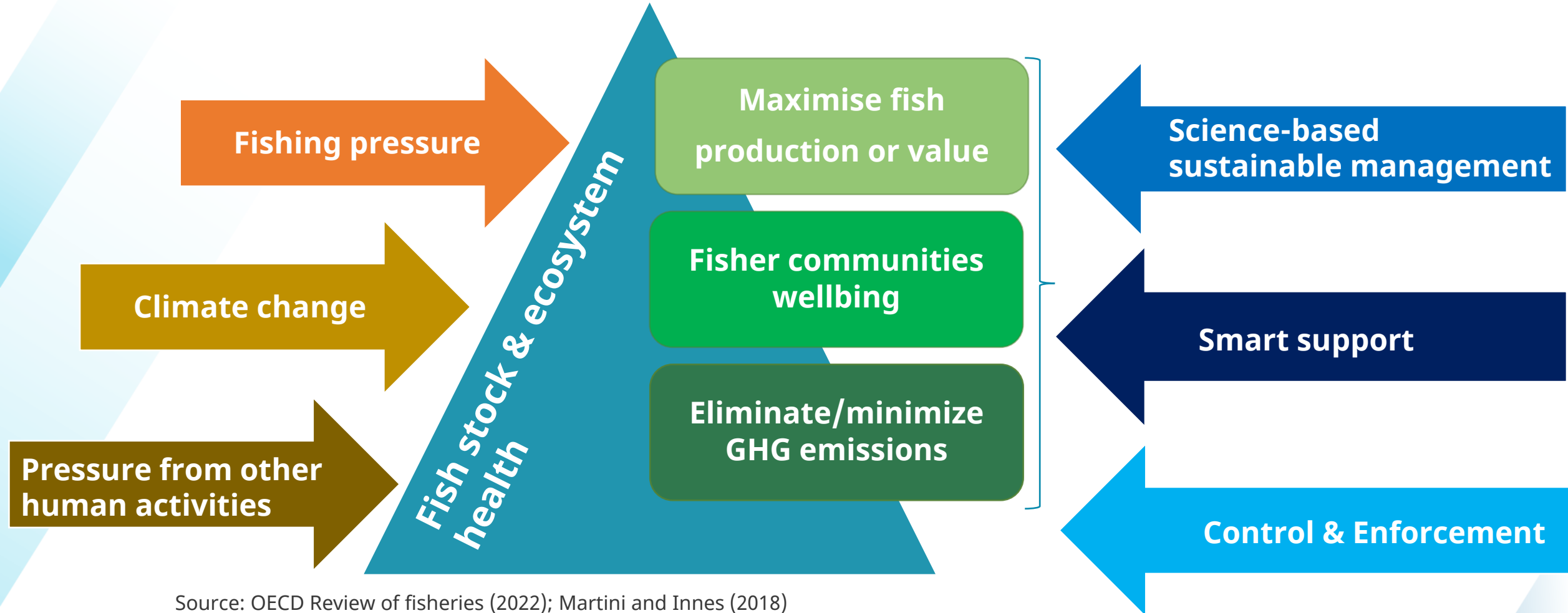
The Policy Briefs for the OECD Review of Fisheries 2022 report provide a summary of key findings, the latest data, and what policy makers can do to support sustainable fisheries and aquaculture.

- » [Managing fish stocks sustainably \(Español, Português, 中文\)](#)
- » [Supporting sustainable fisheries \(Español, Português, 中文\)](#)
- » [Eliminating government support to illegal, unreported and unregulated \(IUU\) fishing \(Español, Português, 中文\)](#)

Access the full report [on the OECD i-Librar](#)



# What can fisheries policy-makers do?

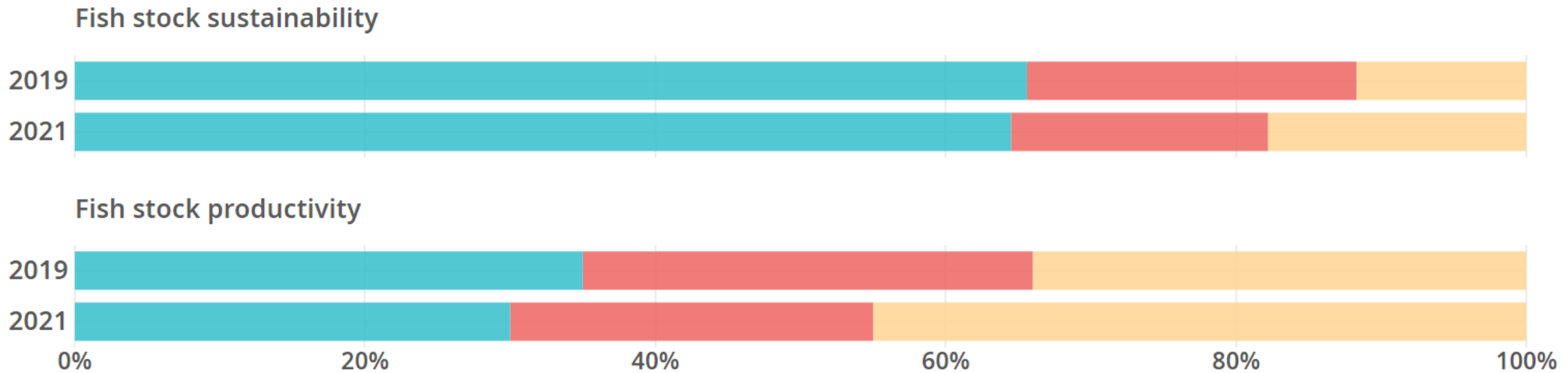


Source: OECD Review of fisheries (2022); Martini and Innes (2018)



# How sustainable and productive are fish stocks?

Meet standards Below standards Undetermined



Source: [OECD \(2022\), OECD Review of Fisheries 2022.](#)

Source: OECD Review of fisheries 2022, Fisheries and Aquaculture Indicators, [http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH\\_INDICATORS](http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_INDICATORS)



# How much do we know about fish stock sustainability and health?

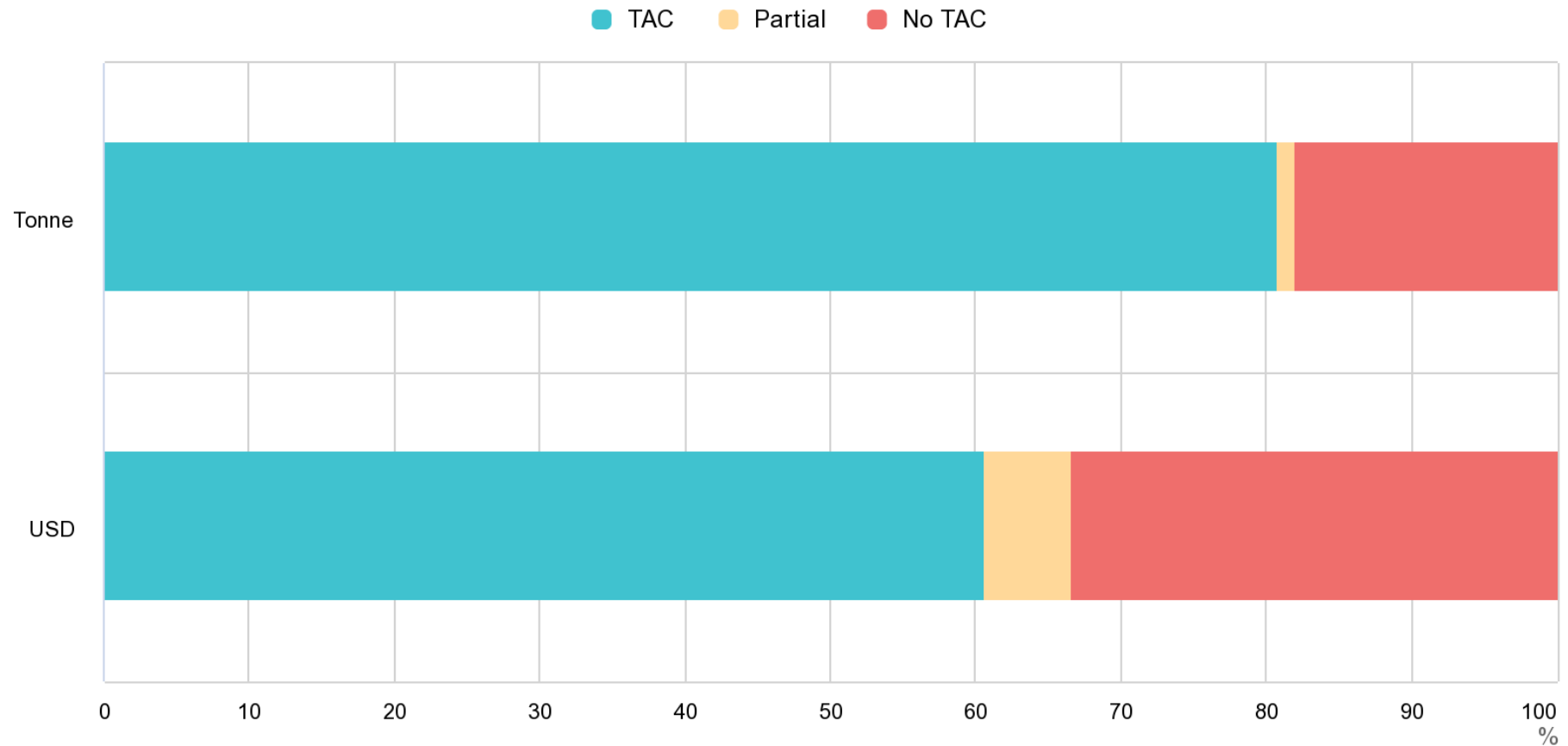


Source: OECD Review of fisheries 2022, Fisheries and Aquaculture Indicators, [http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH\\_INDICATORS](http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_INDICATORS)



# How are key fisheries managed? Where should additional effort concentrate?

Figure 2.7. Use of total allowable catch limits in the management of the most commercially valuable species, 2021

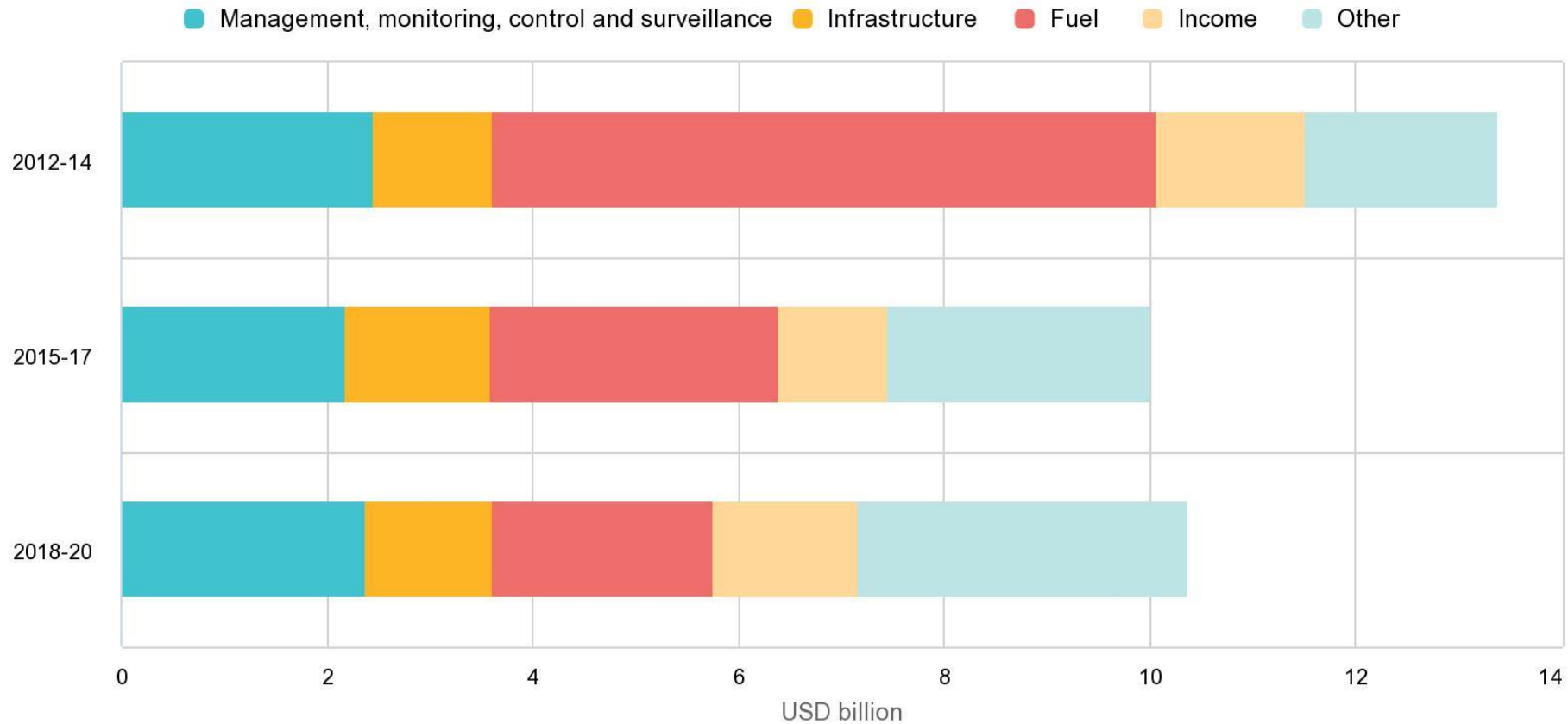


Source: OECD Review of fisheries 2022, Fisheries and Aquaculture Indicators, [http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH\\_INDICATORS](http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_INDICATORS)



# How and how much are government supporting their fishers and fishing sectors? A quasi global overview

Figure 3.2 Support policy mix in recent years, all countries and economies in the FSE database, 2012-20

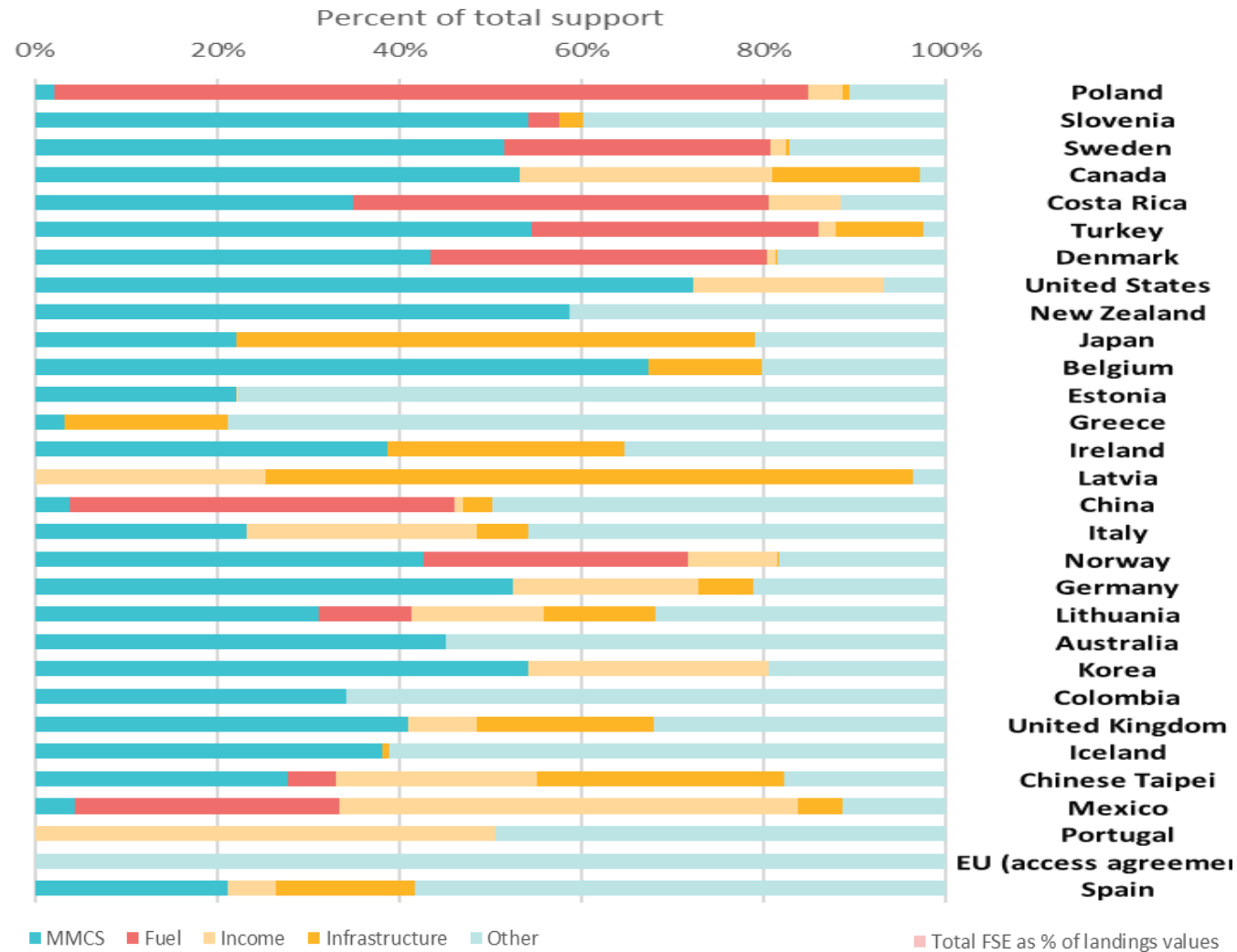


Source: OECD Review of fisheries 2022, Fisheries Support Estimate (FSE), [http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH\\_FSE](http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE).



# How and how much governments are supporting fisheries?

## A country level perspective for the 30 countries with highest %FSE /landing value

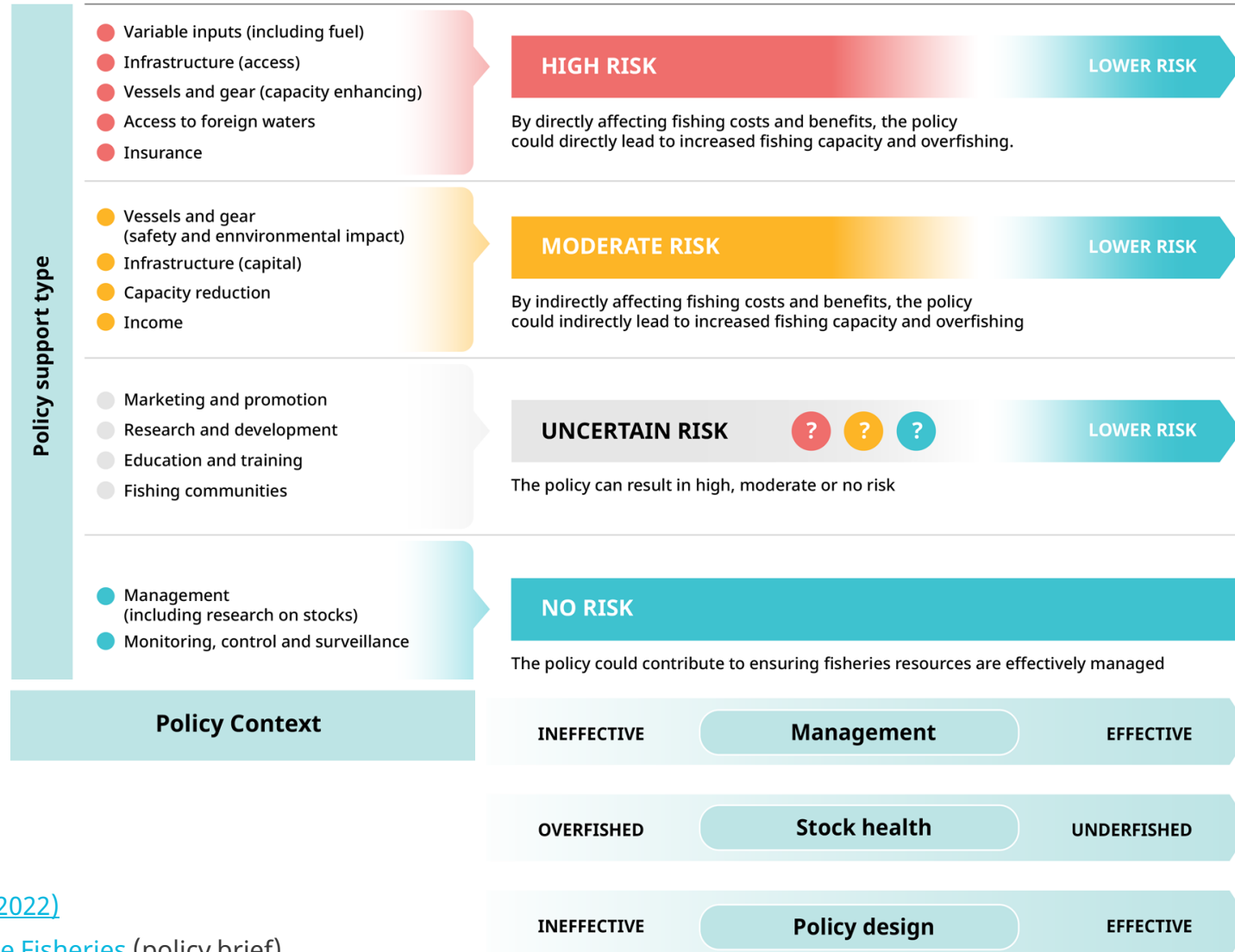


Source: Fisheries Support Estimate (FSE), [http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH\\_FSE](http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE).





# How can governments can identify – and address – the risk of encouraging unsustainable fishing with support?



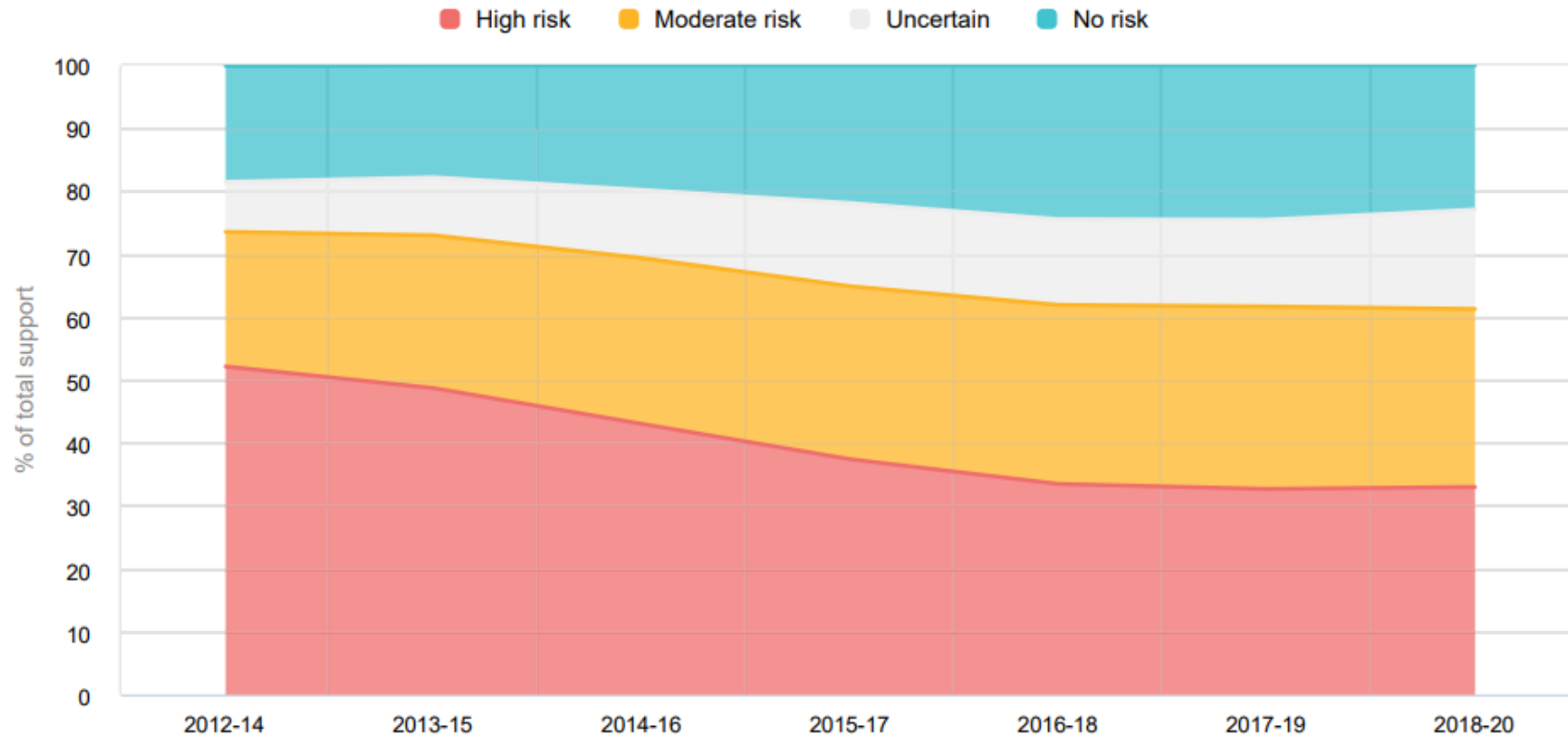
Source: [OECD Review of fisheries \(2022\)](#)

The short read: [Support Sustainable Fisheries](#) (policy brief)



# How has the risk of encouraging unsustainable fishing with support evolved over time?

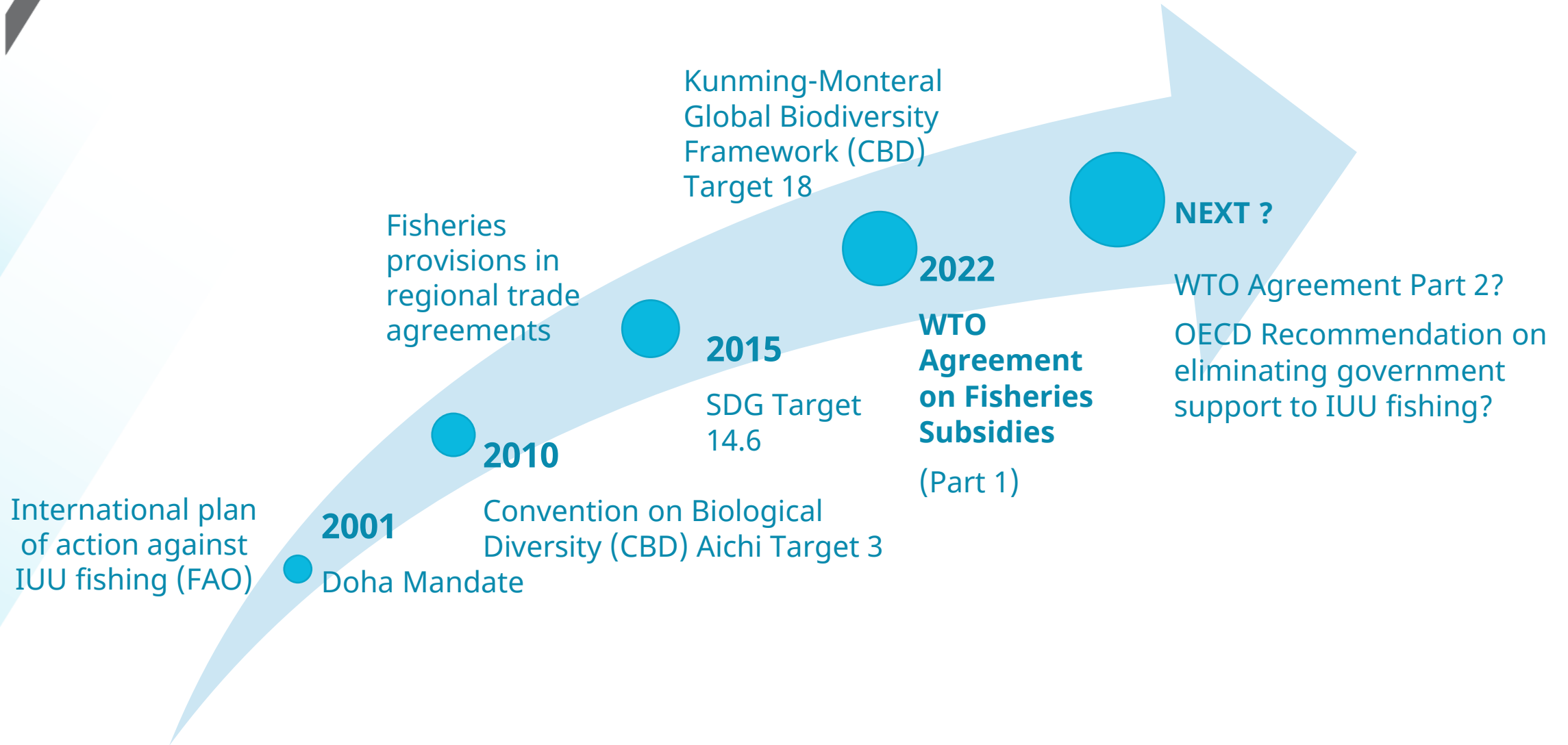
Composition of fisheries support by level of risk of encouraging unsustainable fishing in the absence of effective fisheries management



Note: the graph aggregates support to fisheries as reported in the OECD FSE Database from the 40 countries covered in the OECD Review of Fisheries (2022)

Source: Fisheries Support Estimate (FSE), [http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH\\_FSE](http://stats.oecd.org/wbos/default.aspx?datasetcode=FISH_FSE). [Learn more about the FSE database](#) (brochure)

# Informing a long-standing crucial international process





## More information? The data

### Publicly-accessible standardised information on support to fisheries

Based on information submitted by national authorities, the OECD Fisheries Support Estimate (FSE) database measures, describes and classifies fisheries support policies consistently and transparently to facilitate their evaluation against defined objectives.

The FSE database covers 40 OECD Members and other large fishing nations, which, together, represented 90% of global capture fisheries production by volume in the period 2018-20.

The database records support to fisheries in two main categories of policies: support for services to the sector (which comprises investment in management, research or infrastructure for example) and direct support to individuals and companies in the fisheries sector (such as fuel and vessel subsidies, income support, or payments for capacity reduction).

[Access the FSE data via the OECD data portal](#)

[Download the FSE data in Excel format](#)

FSE data were used to produce country-level indicators on the intensity of support to fisheries relative to the potential impact of support on fish stock health.

[Access the fisheries indicators via the OECD data portal](#)

Access all our data from [the OECD Fisheries and Aquaculture website](#)

YEAR	COUNTRY	Variable Name	MEASURE	Value
492	2014 AUS	I.A. Transfers based on input use	USD	1103477
493	2015 AUS	I.A. Transfers based on input use	USD	2045669
494	2016 AUS	I.A. Transfers based on input use	USD	1454654
495	2017 AUS	I.A. Transfers based on input use	USD	2030833
496	2018 AUS	I.A. Transfers based on input use	USD	5976.15
497	2019 AUS	I.A. Transfers based on input use	USD	0
498	2020 AUS	I.A. Transfers based on input use	USD	0
499	2009 BEL	I.A. Transfers based on input use	USD	3000263
500	2010 BEL	I.A. Transfers based on input use	USD	1.3E+07
501	2012 BEL	I.A. Transfers based on input use	USD	2879006
502	2013 BEL	I.A. Transfers based on input use	USD	1399153
503	2014 BEL	I.A. Transfers based on input use	USD	1244032



# More information? The data

## Fish stock health

As part of the *OECD Review of Fisheries*, the OECD regularly collects data on stock assessments of harvested stocks with nationally determined biological sustainability standards (i.e. limit reference points, typically defined in terms of biomass or mortality thresholds) and higher management standards (i.e. target reference points, typically aimed at optimising catch value or volume under sustainability constraints).

In 2021, 32 countries and economies reported data on recent assessments from a total of 1 457 stocks ("recent" being defined as within the last ten years).

[Download all stock status data in Excel format](#)

	A	B	C	E	F	G	H	I	J	K	M	N	O
1	Stock details					Latest quantitative assessment			Status with respect to biological sustainability			Status with respect to management	
2	Country	STOCK NAME (unique ID)	ASFIS	If the stock is	Management objective	Year	Method	Link (result)	B based	F based	be Status acceptable	B based	F based
3	NZL	ORH East Cape	ORY		BMSY (30-40% B0)	2003	Full quantitative	https://www.n	SSB ≥ soft limit (General)		YES	SSB < 30-40% B0	
4	NZL	ORH7B West Coast South Island	ORY		BMSY (30-40% B0)	2004	Full quantitative	https://www.n	SSB < soft limit (General)		NO	SSB < 30-40% B0	
5	USA	Caribbean spiny lobster - South	SLC	SAFMC / G	BMSY	2005	SCAA	https://www.s	SSB < MSJ < Fmsy		undetermined	SSB ≥ SSBM	F < F
6	NZL	LIN6B (Bounty Plateau)	CUS		BMSY (40% B0)	2006	Full quantitative	https://www.n	SSB ≥ soft limit (General)		Yes	SSB ≥ 40% B0	
7	NZL	OEO 1/OEO3A Southland Smooth	SSO		BMSY (40% B0)	2007	Full quantitative	https://www.n	SSB ≥ soft limit (General)		YES	SSB < 40% B0	
8	USA	Finetooth shark - Atlantic and	CCO	ICCAT	BMSY	2007	Production	https://www.s	B > (1-M) F < Fmsy		YES	B > 50% Car	F < C
9	NZL	OEO6 - Bounty Plateau smooth	SSO		BMSY (40% B0)	2008	Full quantitative	https://www.n	SSB ≥ soft limit (General)		YES	SSB < 40% B0	
10	NZL	PDO2	AKX		BMSY (40% B0)	2008	Fisheries-independent	https://www.fi	SSB ≥ soft limit (General)		Yes	SSB ≥ 40% B0	
11	NZL	PDO3	AKX		BMSY (40% B0)	2008	Fisheries-independent	https://www.fi	SSB ≥ soft limit (General)		Yes	SSB ≥ 40% B0	
12	NZL	DAN2	DSZ		BMSY (40% B0)	2008	Fisheries-independent	https://www.n	SSB ≥ soft limit (General)		YES	SSB ≥ 40% B0	
13	NZL	DAN3	DSZ		BMSY (40% B0)	2008	Fisheries-independent	https://www.n	SSB ≥ soft limit (General)		YES	SSB ≥ 40% B0	
14	NZL	MDI2	MQD		BMSY (40% B0)	2008	Fisheries-independent	https://www.n	SSB ≥ soft limit (General)		YES	SSB ≥ 40% B0	
15	NZL	MMI3	MQO		BMSY (40% B0)	2008	Fisheries-independent	https://www.n	SSB ≥ soft limit (General)		YES	SSB ≥ 40% B0	
16	NZL	SAE2	PQQ		BMSY (40% B0)	2008	Fisheries-independent	https://www.n	SSB ≥ soft limit (General)		YES	SSB ≥ 40% B0	
17	NZL	SAE3	PQQ		BMSY (40% B0)	2008	Fisheries-independent	https://www.n	SSB ≥ soft limit (General)		YES	SSB ≥ 40% B0	
18	NZL	OEO3A Smooth	SSO		BMSY (40% B0)	2009	Full quantitative	https://www.n	SSB ≥ soft limit (General)		YES	SSB ≥ 40% B0	
19	USA	Scalloped hammerhead - Atlantic	SPL	ICCAT	BMSY	2009	Production	https://www.s	Not Calculated	F > Fmsy	NO	B < Bmsy Pr	F > F
20	CHL	Besugo (III-X Regiones)	EGV		BMSY	2009	Quantitative	https://www.s	BD < 20% BDo		Undetermined	BD-RMS < 40%	BDo
21	NZL	COC1A			BMSY (40% B0)	2009	Fisheries-independent	https://www.n	SSB ≥ soft limit (General)		Yes	SSB ≥ 40% B0	
22	NZL	OYS7C	OCH		BMSY (40% B0)	2009	Full quantitative	https://www.n	SSB < soft limit (General)		Yes	SSB < 40% B0	
23	NZL	TAR4	TAK		B40% proxy	2009	Standardised	https://www.n	SSB ≥ soft limit (General)		YES	B > B40% proxy	



# More information? Country profiles

 **Compare your country**  
Review of Fisheries 2022

## Denmark

### Introduction

Globally, fish are an important source of nutritious food and security and in the local economy of the many coastal countries. Fish and fisheries play an important role in the delivery of essential services such as biodiversity and play an important role in the delivery of essential climate regulation, food provision and nutrient cycling.

The 2022 edition of the *OECD Review of Fisheries* brings together information on fisheries management, and support to fisheries and invest in sustainable and resilient fisheries that can provide jobs, food security and contribute to sustainable development. The report covers 40 countries and economies, which together with the 10 of the most important countries and economies in the world (Argentina, Brazil, the People's Republic of China [hereafter the Philippines, Chinese Taipei and Viet Nam).

These country notes describe in brief each country's fisheries policies. They are intended to inform policy dialogue and adopted goals and targets with respect to sustainable fisheries.

### Overview of the fisheries sector

#### Fisheries production

In 2020, the 40 countries and economies covered by the *OECD Review of Fisheries* captured about **58 million tonnes of fish** in marine waters and **17 million tonnes of farmed fish**, worth around **USD 83 billion** in 2020. Their landings were worth around **USD 83 billion** in 2020, but down from an all-time high of **USD 91 billion** in 2008 for 38% of the catch volume and 41% of the value of landings. The same countries and economies captured about **17 million tonnes of farmed fish**, worth **USD 253 billion** in 2020. Aquaculture production in 2020, both in volume (at an annual average rate of 5%) and value. The OECD countries together accounted for 8% of aquaculture production in 2020; these shares have declined consistently over the last 15 years.

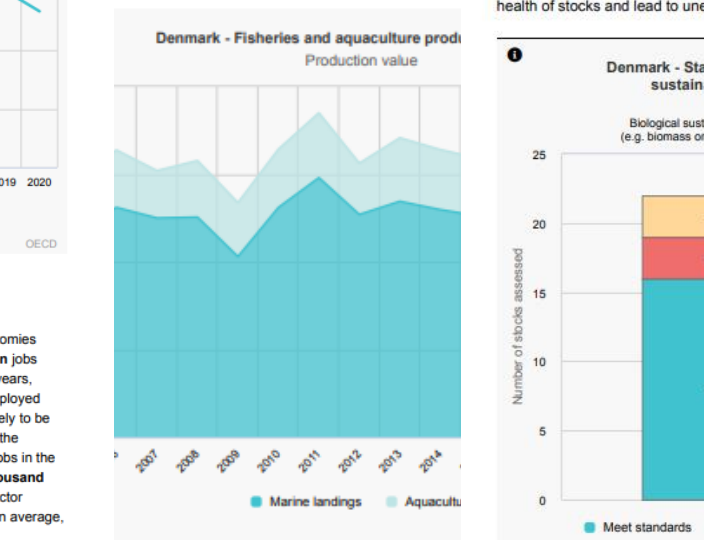
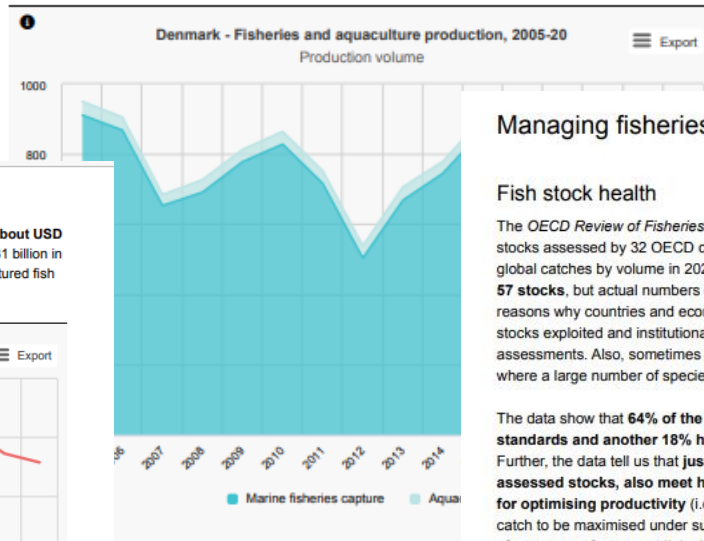
### Fish trade

Fish is one of the most traded food commodities. In 2020, **exports of fish products totalled about USD 118 billion** in the countries and economies covered in this report, down from a peak of **USD 131 billion** in 2018, mainly due to the impact of the COVID-19 pandemic. Fish trade figures include both captured fish and farmed fish, as trade data do not distinguish between the two.



### Employment

Employment in fisheries has been relatively stable in recent years in the 40 countries and economies covered by the *OECD Review of Fisheries* 2022, fluctuating **between 25 million and 27 million jobs** since the mid-2000s. Employment in aquaculture has also been relatively stable in the last 10 years, fluctuating **between 16 and 17 million jobs**. In addition, in 2020, the fish processing sector employed **about 619 thousand people**. However, this number should be interpreted with caution. It is likely to be underestimated, due to a lack of reporting from several countries. In OECD countries, in 2020, the fisheries sector employed about 1 million people (or about 4% of the total number of fisheries jobs in the 40 countries and economies considered) while the aquaculture sector employed **about 349 thousand people** (or about 2% of the total number of aquaculture jobs). In relative terms, the fisheries sector accounts for a much higher share of total employment in the emerging economies (about 2% on average, over the 2010-20) than in the OECD countries (about 0.2%).

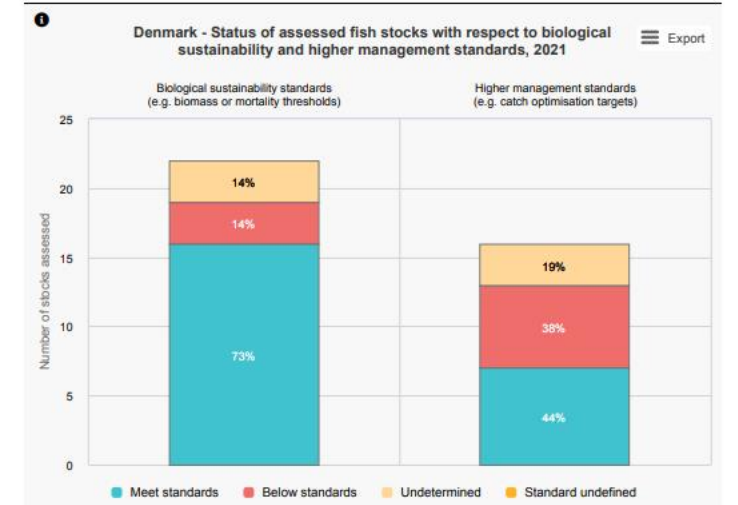


## Managing fisheries

### Fish stock health

The *OECD Review of Fisheries* 2022 analyses a unique data set of the status of 1 456 individual fish stocks assessed by 32 OECD countries and emerging economies (which together accounted for 45% of global catches by volume in 2021). **On average, countries and economies in the data set assessed 57 stocks**, but actual numbers of stocks assessed vary from zero to several hundreds. There are many reasons why countries and economies assess different numbers of stocks, including the number of stocks exploited and institutional capacity, which depends on the resources devoted to conducting assessments. Also, sometimes it may not be practical or even possible to conduct stock assessments where a large number of species are exploited in the same area, such as tropical reef fisheries.

The data show that **64% of the stocks assessed are in good health**, **18% fall below sustainability standards and another 18% have an undetermined status** as assessments were inconclusive. Further, the data tell us that **just under half of the stocks that are in good health, that is, 30% of assessed stocks, also meet higher management standards sometimes set by fisheries managers for optimising productivity** (i.e. these stocks are abundant enough to allow the volume or value of catch to be maximised under sustainability constraints). Natural variation in stock health, or the impacts of exogenous factors not linked to fishing, such as climate change, can have significant impacts on the health of stocks and lead to unexpected declines (or increases) irrespective of management regimes.





# The OECD and its Fisheries Committee stand ready to inform future G20 discussions on fisheries

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