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THE STATE OF WORLD FISHERIES AND AQUACULTURE

2008

FAO Fisheries and Aquaculture Department

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS

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FOREWORD

A milestone may be near. After growing steadily, particularly in the last four decades, aquaculture is for the first time set to contribute half of the fish consumed by the human population worldwide. This reflects not only the vitality of the aquaculture sector but also global economic growth and continuing developments in fish processing and trade.

Until a year or so ago, the production trends in aquaculture and capture fisheries were continuing without any drastic modification to those already in place at the start of this decade. The capture fisheries sector was regularly producing between 90 and 95 million tonnes per year, and aquaculture production was growing rapidly, albeit at a gradually declining rate.

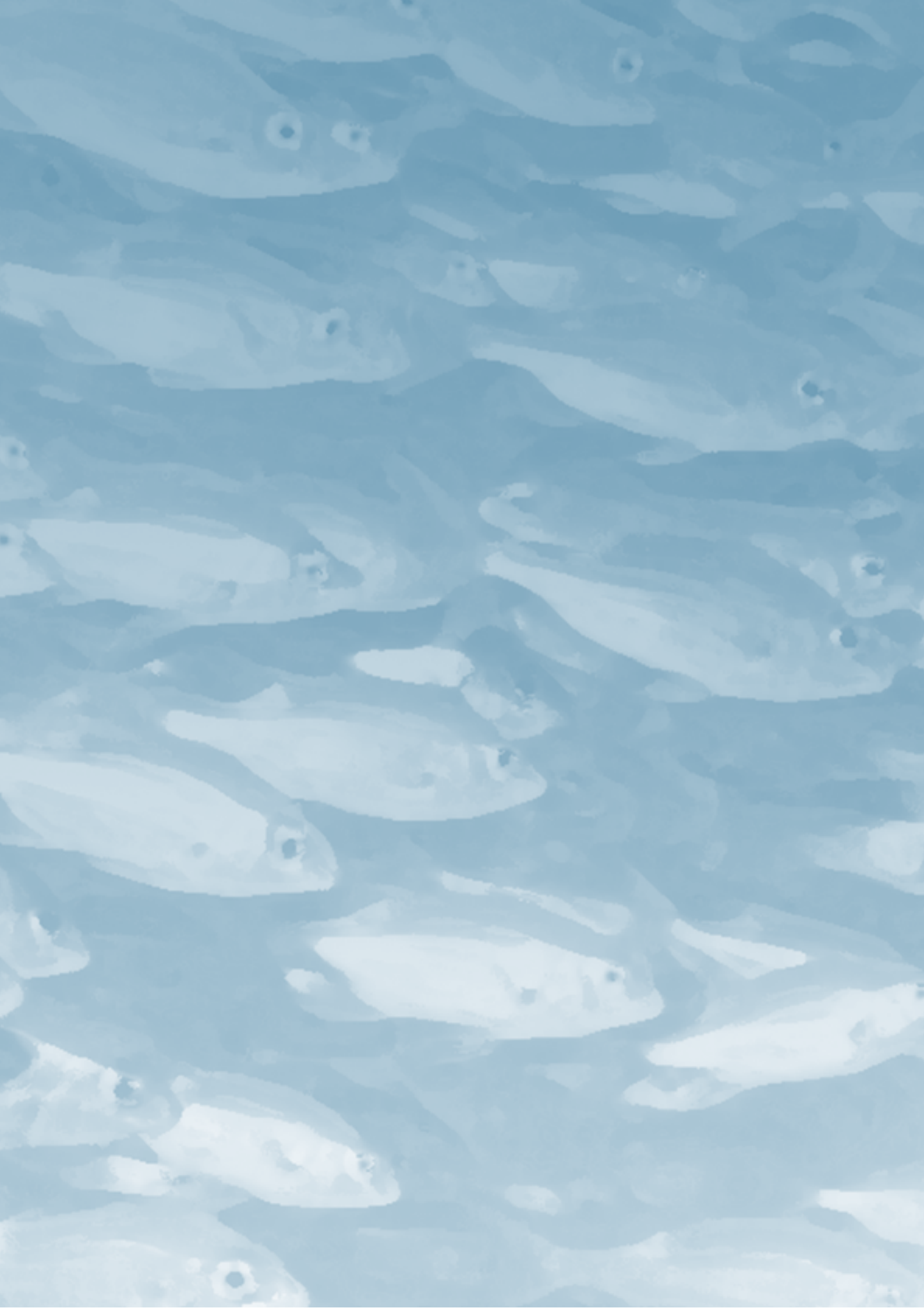
However, the substantial increases in energy and food prices, which started in 2007 and have continued into 2008, as well as the threat of climate change, mean that the conditions for capture fisheries and aquaculture are changing. That said, the combined effects of rising prices and climate change are complex, and they affect a very large number of fisheries and aquaculture operations in a mosaic of natural, social and economic contexts. Hence, it is too early to have a clear understanding of the cumulative impact worldwide on fisheries and aquaculture.

Nonetheless, it is clear that there will be both winners and losers among fishers, aquaculturists and those employed in ancillary industries. On the one hand, rising prices for staple foods will also cause an increase in the price of many fish and fish products, and this will stimulate all in the sector to produce more. However, those who capture or culture fish, or other aquatic animals, using energy-intensive forms of production may find recent cost increases prohibitive. They may well face difficulties in continuing in their occupation, at least in the immediate future. On the other hand, low-intensity aquaculture and most small-scale and artisanal fisheries will attempt to expand production. This will increase the importance of improved governance in both aquaculture and low-energy-consuming fisheries (some near-shore fisheries, passive fishing gear, etc.).

This issue of *The State of World Fisheries and Aquaculture* features some of the aspects of fisheries and aquaculture that may receive increasing attention. Among these aspects are climate change, the use of marine genetic resources in areas beyond national jurisdiction, and the proliferation of private standards and certification schemes in the international fish trade. This issue also highlights a few of FAO's special studies. These include the use of wild-fishery resources as seed and feed in aquaculture, and reviews of the world's shrimp fisheries and of the management of marine capture fisheries in the Pacific Ocean.

The format of *The State of World Fisheries and Aquaculture* remains unchanged. As with previous editions, this issue contains a CD-ROM with the *World Fisheries and Aquaculture Atlas*.

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ABBREVIATIONS AND ACRONYMS

**ABNJ**

area beyond national jurisdiction

ASEAN

Association of Southeast Asian Nations

BCC

Benguela Current Commission

BCLME

Benguela Current Large Marine Ecosystem

BMP

better management practice

CCAMLR

Commission for the Conservation of Antarctic Marine Living Resources

CCRF

Code of Conduct for Responsible Fisheries

CCSBT

Commission for the Conservation of Southern Bluefin Tuna

CGRFA

Commission on Genetic Resources for Food and Agriculture

CO₂

carbon dioxide

COFI

Committee on Fisheries

EAA

ecosystem approach to aquaculture

EAF

ecosystem approach to fisheries

EEA

European Economic Area

EEZ

exclusive economic zone

EPA

Economic Partnership Agreement

EU

European Union

FIRMS

Fisheries Resources Monitoring System

GAP

good agricultural practice

GDP

gross domestic product

GEF

Global Environment Facility

GHG

greenhouse gas

GMO

genetically modified organism

GT

gross tonnage

HACCP

Hazard Analysis and Critical Control Point (system)

IATTC

Inter-American Tropical Tuna Commission

ICCAT

International Commission for the Conservation of Atlantic Tunas

ILO

International Labour Organization

IMO

International Maritime Organization

IOTC

Indian Ocean Tuna Commission

IPOA

international plan of action

ISO

International Organization for Standardization

IUU

illegal, unreported and unregulated (fishing)

JWG

joint working group

LDC

least developed country

LIFDC

low-income food-deficit country

MCS

monitoring, control and surveillance

MDG

Millennium Development Goal

MGR

marine genetic resource

MPA

marine protected area

MSC

Marine Stewardship Council

NACA

Network of Aquaculture Centres in Asia–Pacific

NEAFC

North East Atlantic Fisheries Commission

NGO

non-governmental organization

OECD

Organisation for Economic Co-operation and Development

OIE

World Organisation for Animal Health

RASF

risk assessment for sustainable fisheries

RFB

regional fishery body

RFMO

regional fisheries management organization

S&DT

special and differential treatment

SADC

Southern African Development Community

SIOFA

South Indian Ocean Fisheries Agreement

SPRFMO

South Pacific Regional Fisheries Management Organization

SSA

sub-Saharan Africa

TAC

total allowable catch

TBT

technical barriers to trade

UNCED

United Nations Conference on Environment and Development

UNCTAD

United Nations Conference on Trade and Development

UNDP

United Nations Development Programme

VMS

vessel monitoring system

WCPFC

Western and Central Pacific Fisheries Commission

WTO

World Trade Organization

WWF

World Wide Fund for Nature