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Fish Trade and Policy: A primer on Non-Tariff Measures

Abstract

This paper presents some novel results on the prevalence of Non-Tariff Measures (NTMs) in the fish sector. They are obtained using a dataset recently released by UNCTAD's secretariat. Six major stylized facts emerge. First, products of the fish sector are relatively more affected by NTMs and more intensively than products belonging to non-fish sectors. Second, products of the fish sector are mostly affected by technical regulations and in particular SPS measures. Third, almost all countries impose SPS measures on all imports of products of the fish sector. Fourth, similar types of SPS measures and TBTs affect both fish and non-fish products. However, their incidence is much larger in fish products. Fifth, no product (or type of product) of the fish sector appears to be more affected by NTMs than any other. Sixth, no systematic relationship between tariffs and NTMs incidence can be identified.

Key words: Fisheries, Trade, Non-Tariff Measures, Tariffs

JEL Classification: F13



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Introduction

International trade is crucial to the fish sector especially in the least advanced economies. International trade can act as an employment creator, food supplier, income generator, and thus contributes to maintain food and nutrition security. In this context international trade can be expected to play a core role as a contributor to economic growth and development. FAOs most recent report on the State of World Fisheries and Aquaculture (FAO, 2016) points to the fact that the sustained expansion of trade in fish and fishery products observed in recent decades has been fueled by growing fishery production and driven by high demand. As a consequence the fisheries sector has increasingly operated in a globalized environment and the tendency may further intensify. This may not have only positive consequences as over-capture and acceleration in stocks depletion have already reached worrying thresholds. Sustainability has been at risk for several years and trade and its intensification possibly driven by inadequate policy approaches and instruments may not levy related concerns as discussed in a recent report produced by UNCTAD (UNCTAD, 2016). Two broad categories of policy measures are usually considered: tariff and non-tariff measures. While the former category is somewhat narrowly defined the latter encompasses a large number of heterogeneous policy instruments including Sanitary and Phytosanitary measures as well as quantity restrictions or subsidies. Both categories of instruments can apply to either imports or exports. Before being in a position that could allow drawing conclusions about the appropriateness or not of the use of this set of instruments, a clear assessment of their respective incidence is necessary and eventually unavoidable. Such an exercise is also necessary to establish any possible relationship between these various instruments and possible consequences in terms of trade and economic performance. However, data on policy instruments other than tariffs remain scarce especially within a consistent multi-country framework.

This paper presents some analysis of the prevalence of Non-Tariff Measures using a novel dataset recently released by UNCTAD. Although the reference country sample remains limited in terms of country coverage, countries included account for more than 80 percent of world fish trade. As a consequence the picture we obtain is a precise reflection of the types of NTMs implemented around the world and especially in major destination markets. The paper also presents some descriptive statistics related to tariffs and offer some integrated view of two major policy instruments implemented in the fish sector. Subsidies are not part of the study due to limited data availability.

Our analysis allows the formulation of several stylized facts. First, products of the fish sector are relatively more affected by NTMs and more intensively than products belonging to non-fish sectors. Second, products of the fish sector are mostly affected by technical regulations and in particular SPS measures. Third, almost all countries impose SPS measures on all imports of products of the fish sector. Fourth, similar types of SPS measures and TBTs affect both fish and non-fish products. However, their incidence is much larger in fish products. Fifth, no product (or type of product) of the fish sector appears to be more affected by NTMs than any other. Sixth, no systematic relationship between tariffs and NTMs incidence can be identified.

The rest of the paper is organized as follows. Next section provides an overview of trade flows and their main actors in the Fish sector. Section 3 presents some major characteristics of NTM data collected by UNCTAD and discusses some possible limitations in their use. Stylized facts based on these NTM data are established in Section 4. Section 5 investigates how tariffs and NTMs incidence relate to each other. Section 6 discusses possible implications for small-scale and artisanal fisheries. Last section presents some possible implications for policy making and indicates desirable directions for further and deeper investigation.

1. Fish trade: an overview

Fish and fishery products constitute one of the most-traded segments of the world food sector. According to FAO (2106) figures, about 78 percent of seafood products are estimated to be exposed to international trade competition. Fish trade has displayed a strong progression in value over the period between 2000 and 2015 as put in evidence by Table 1 figures. Its value more than doubled despite a slowing down since the financial crisis of 2008 and a drop of about 20 percent in 2015. In relative terms, however, fish trade has grown less rapidly than total trade in most years. Moreover its share in total trade has remained below 1 percent over the last 15 years. It was equal to 0.87 percent in 2000 and fell to 0.71 percent in 2014. Fish trade deceleration has proved to be weaker than that of total trade in 2015 and as a consequence its share moved up to 0.74 percent over that year. Table 3 reveals that the largest group of products traded is raw fish either fresh or chilled or frozen and represented 50 percent of total fish exports in 2015 and 44 percent in 2000. The second largest group includes crustaceans and molluscs either fresh or chilled or frozen. Its share in fish trade was equal to 27 percent in 2015 while it was equal to 34 percent in 2000. The third largest group of fish products is not preparations, whose share has remained stable at about 5 percent over the whole period, but oils and fats and other products unfit for human consumption with a share that has slightly increased since 2000 and was about 19 percent in 2015.

Table 4 reports various country groups shares in world exports and imports. Developing countries (excluding China and LDCs) account for about 40 percent of World exports but only about 23 percent of World imports. While the former has slightly decreased since 2000 the latter doubled. Demand has been growing significantly in developing countries and this is without counting China. China's share in total imports more than doubled since 2000 reaching 5.3 percent in 2015. China is the largest exporter of fish and fish products in 2015. Its share in total exports was equal to 7.3 percent in 2000 and moved up to more than 15 percent in 2015. LDCs experience is more contrasted. Their share in world imports more than doubled since 2000 but remains below 1 percent in 2015. In terms of exports, their presence on international markets has fallen over the 15 years under investigation moving from 3.2 per cent in 2000 to 2.5 percent in 2015. Developed countries have also lost part of their predominant role in World imports observed in 2000 again for the benefit of developing countries and China. Nonetheless, developed countries still represent 70 percent of total imports in 2015. On the exports side, the share of developed countries has also decreased over the same period. It was equal to 46.2 percent in 2000 and to about 41 percent fifteen years later. In other words we observe some convergence in terms of supply influence on international markets between developing and developed countries. If we add China to the developing countries group then this shift in market influence is even sharper. Figures for transition economies suggest some (re)vitalization of the sector especially between 2000 and 2005 with mitigated tendencies afterwards. They represent 2.3 percent of world exports and 2.5 percent of world imports in 2015. Shares have also been computed for some additional sub-groups, African LDCs, Island LDCs plus Haiti and SIDS (UNCTAD definition). While imports share have increased even if only slightly for the three sub-groups exports performance has varied. While the share of SIDS exports has increased since 2000 that of African LDCs has decreased and that of Island LDCs has remained somewhat constant.

Despite overall tiny shares in world trade and somewhat stagnating performance over the last 15 years exports of fish and fishery products remain essential to many economies. Figures 1 to 5 report shares in world and group aggregates of both imports and exports of the four major fish products groups defined previously for seven different country groups.

Table 1. Growth in World exports

Products Group	2000	2005	2010	2013	2014	2015
Fresh-Chilled-Frozen	100	153	213	251	261	238
Dried-Salted-Smoked	100	131	184	204	217	198
Crustaceans-Molluscs	100	114	136	165	188	172
N.E.S	100	146	197	255	255	228
Total	100	138	183	221	233	212

Source: Authors' calculations based on UNCTADSTAT database

Note: The year 2000 represents the base year. All exports values are expressed in terms of exports values in 2000.

Table 2. Share in total World exports

Sector	2000	2005	2010	2013	2014	2015
Fresh-Chilled-Frozen	0.38%	0.36%	0.35%	0.34%	0.35%	0.36%
Dried-Salted-Smoked	0.04%	0.03%	0.03%	0.03%	0.03%	0.03%
Crustaceans-Molluscs	0.29%	0.21%	0.17%	0.17%	0.19%	0.20%
N.E.S	0.15%	0.14%	0.13%	0.13%	0.13%	0.14%
Total	0.87%	0.74%	0.68%	0.67%	0.71%	0.74%

Source: Authors' calculations based on UNCTADSTAT database

Table 3. Share in World fish exports

Products Group	2000	2005	2010	2013	2014	2015
Fresh-Chilled-Frozen	44%	49%	51%	50%	49%	50%
Dried-Salted-Smoked	5%	5%	5%	5%	5%	5%
Crustaceans-Molluscs	34%	28%	25%	25%	27%	27%
N.E.S	17%	18%	19%	20%	19%	19%

Source: Authors' calculations based on UNCTADSTAT database

Table 4. Country Groups participation in World fish exports

Country Group	2000		2005		2010		2013		2014		2015	
	X	M	X	M	X	M	X	M	X	M	X	M
DVG-China-LDCs	41.5 %	13.6 %	37.2 %	15.0 %	36.2 %	19.2 %	37.6 %	20.3 %	40.0 %	21.2 %	37.5 %	22.7 %
LDCs	3.2%	0.3%	2.9%	0.4%	2.4%	0.5%	3.0%	0.8%	2.5%	0.8%	2.5%	0.8%
China	7.0%	2.2%	10.6 %	3.6%	12.7 %	4.2%	14.7 %	4.7%	14.9 %	5.2%	15.3 %	5.3%
DEV	46.2 %	85.7 %	50.6 %	75.0 %	46.2 %	73.1 %	42.7 %	68.8 %	42.9 %	69.7 %	40.6 %	70.0 %
Transition	0.8%	0.9%	1.0%	2.5%	2.5%	3.5%	2.6%	4.1%	2.5%	3.6%	2.5%	2.3%
<i>LDCs_Africa</i>	1.9%	0.2%	1.7%	0.3%	1.3%	0.4%	1.4%	0.7%	1.3%	0.7%	1.3%	0.6%
<i>LDCs_Islands_Haiti</i>	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.0%	0.1%	0.0%
<i>SIDS</i>	1.0%	0.3%	1.1%	0.5%	1.1%	0.6%	1.4%	0.8%	1.3%	0.8%	1.3%	0.7%

Source: Authors' calculations based on UNCTADSTAT database

Figure 1 (panel (a) and (b)) reveals that as far as developing countries (LDCs and China excluded) are concerned, exports of fish products represent a large share of world exports, up to 50 percent for Crustaceans and Molluscs,

about 40 percent for N.E.S group (essentially fats and oils and products unfit for human consumption) and about 30 percent for Fresh, Chilled and Frozen Fish in 2015. Despite this strong presence on fish international markets exports of fish products represent only slightly more than 1 percent of group's total exports. Panels (c) and (d) reveal that developing countries are also large importers of fish products. They count average for 20 percent of world imports of fish products which correspond to about 0.7 percent of total group's imports. Figure 2 reports the same data relating to LDCs. Their exports of fish products represent about 10 percent of world exports in that sector. Their largest share in world exports is observed for Crustaceans and Molluscs products. Fish exports represent about 2 percent of group's total exports. As shown in panel (c) LDCs imports of fish products account for about 2.5 percent of world imports of these products and are concentrated in processed products or other animal products not produced domestically. Figure 3 refers to China's situation. As mentioned previously China is the largest exporter of fish and fish products overall. As shown in panel (d) its performance has been recently driven by significant increases in exports of fats and oils and products unfit for human consumption. Fish and fish products represent about 2 percent of China's total exports which is a large share compared to world aggregates and other country groups figures. As shown in panel (c) and (d) China's imports are driven mostly by imports in the crustacean and molluscs sector and in the fresh, chilled and frozen fish sector.

Figure 1. Fish Trade in Developing countries (LDCs and China excluded)

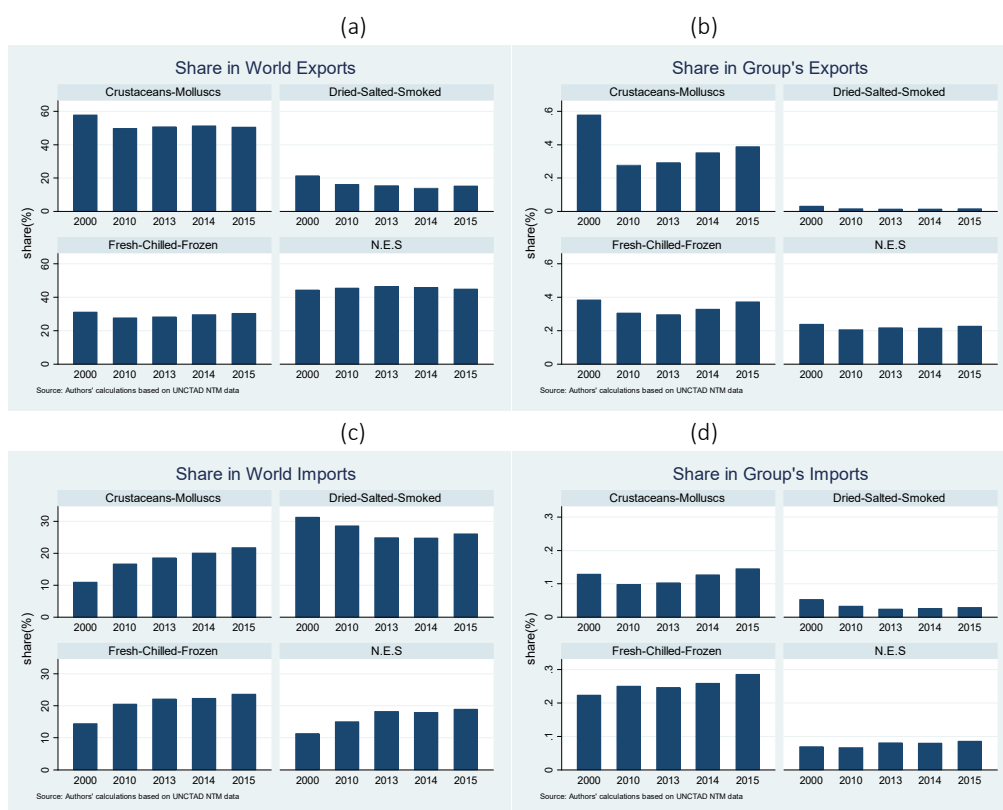


Figure 4 (panels (a) and (b)) indicates that there are two dominant sectors in developed countries exports, namely fresh frozen and chilled fish and processed fish products. In both cases developed countries exports share is around 60 percent. Panels (c) and (d) suggest that developed countries are large importers in all sectors and that fish and fish products represent about 1 percent of their total imports. Transition economics as shown in panels (a) and (b) of Figure 5 export essentially fresh chilled and frozen fish together with dried,

slated and smoked fish products with shares in world exports however never exceeding 4 percent. Imports are also predominantly found in these two sectors.

Figure 2. Fish trade in LDCs

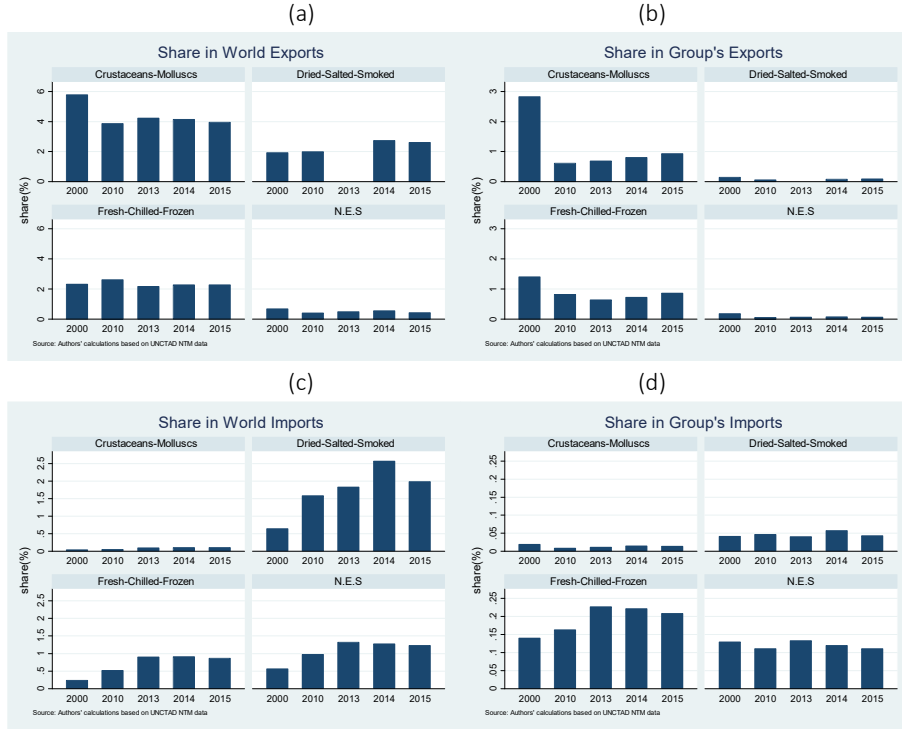


Figure 3. Fish trade in China

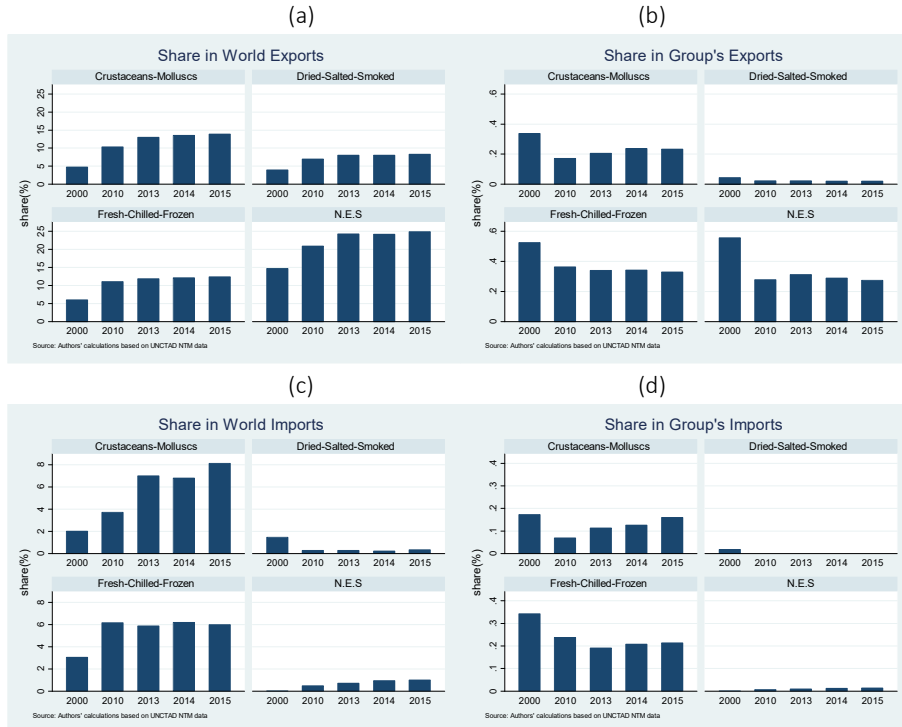
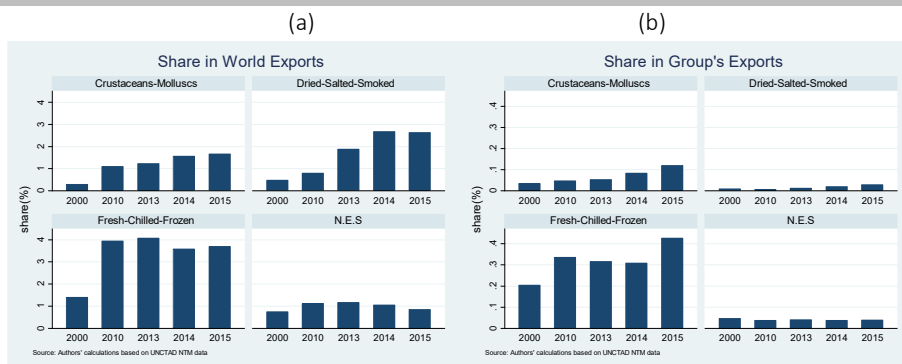


Figure 4. Fish trade in Developed countries**Figure 5. Fish trade in Transition Economies**

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