



Integrated Assessment of Trade Liberalization and Trade-Related Policies

A Country Study on the Fisheries Sector in Argentina



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NOTE

The views and interpretation reflected in this document are those of the author(s) and do not necessarily reflect an expression of opinion on the part of the United Nations Environment Programme.

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EXECUTIVE SUMMARY

The application of structural adjustment policies in Argentina in the 1990s had a series of strong impacts on the economic structure of the country. The positive impacts caused by structural changes (such as price stabilization and a fixed foreign exchange rate), created conditions that encouraged growth in the fisheries sector. The growth of the fisheries sector was accompanied by the opening up of trade for Argentine fisheries products in foreign markets, and the diminishing resources in oceans under developed countries' jurisdiction. These revisions meant that there was an increase in fisheries production and exports, an improvement and growth of the fisheries fleet, and technological innovation in the sector. Furthermore, there was a transfer of the overcapacity fleets from some countries to Argentina, instrumented with the benefit of subsidies.

The exploitation of fisheries resources was minor in Argentina until the opening up of the economy. The growth of fisheries exploitation then took place at unprecedented rates, and this has been one of Argentina's most dynamic economic sectors in recent times. It has been categorized as the world's fastest growing fishery. Value added has grown steadily and exports grew 478 per cent between 1985 and 1995. Exports have even surpassed, for some years, international trade in traditional agricultural products. A strong international dimension is present in the current patterns, not only by the growth in international trade and a heavy reliance on foreign markets by the sector on harvesting (since only about 10 per cent of the products are consumed domestically), but also due to the transnationalization of capital in the fisheries sector.

However, the increasing and unregulated fisheries trade has had critical negative impacts on resources and on the socio-economic structure of the fisheries sector. Some of the verifiable impacts are: degradation of the fisheries biomass and near collapse for some species; variations in fishing effort; ecological degradation; increased costs for fisheries regulation and control; increased operation costs; augmenting fiscal costs and subsidies; corruption practices; and non diversification of catches. Many of these specific impacts are directly related to investment oversizing, as the overcapitalization of fleets. Other impacts have been increasing unemployment and underemployment, as well as the worsening of labour conditions. Social conflict is another relevant negative impact that arises in periods of fisheries' resource scarcity. The quantifiable economic costs (evaluated by cost-benefit analysis), have indicated that the policy situation of the 1990s (that is, uncontrolled fishing activity as well as a lack of adequate economic instruments), has implied a net direct cost of about US\$ 500 million, just for the most exploited species. The same sort of CBA was carried out for a hypothetical situation defined as respecting maximum sustainable yield (MSY). If this parameter had been utilized, this policy could have had a net benefit of about US\$ 5,100 million.

A whole series of economic instruments for sustainable management can be implemented in order to benefit from trade in the fisheries sector, and at the same time maintain natural capital, develop the industry and generate employment. These can be changes in the

sector's productive and economic structures (changes from commodity mode to use of resources with value added), re-dimensioning the fishing fleets, as well as the implementation of a tradable quota system. Other management measures can range from technological adaptations of the fishing gear, the overhauling of command and control mechanisms, to an effective application of a sustainable development policy orientated to the Argentine fisheries sector.

ABBREVIATIONS AND ACRONYMS

CBA	cost-benefit analysis
CCAMLR	Commission for the Conservation of Antarctic Marine Living Resources
CEDEA	<i>Centro de Estudios Ambientales</i>
CFP	Federal Fisheries Council
CPUE	capture per unit of effort
CTMFM	<i>Comisión Técnica Mixta del Frente Marítimo Argentino-Uruguayo</i> (Technical Mixed Commission of the Argentine-Uruguayan Maritime Front)
EEZ	Economic Exclusive Zone
EU	European Union
FAJ	Fisheries Agency of Japan
FFC	Federal Fisheries Council
FOB	free on board
FONAPE	National Fisheries Fund
GDP	gross domestic product
GOA	Government of Argentina
GPV	gross production value
H & G	headed and gutted
INIDEP	<i>Instituto Nacional de Investigación y Desarrollo Pesquero</i> (National Institute for Research and Development of Fisheries)
ITQ	individual tradable quotas
JICA	Japan International Cooperation Agency
MERCOSUR	Southern Common Market
MSY	maximum sustainable yield
NAFTA	North American Free Trade Association
NPV	net present value
OECD	Organization for Economic Cooperation and Development
PROMEX	<i>Programa de Promoción de Exportaciones de Productos de Base Agrícola No Tradicionales</i> (Programme for the Promotion of Exports from Non-Traditional Agricultural Base)
QMS	quota management system

SAGPyA	<i>Secretaría de Agricultura, Ganadería, Pesca y Alimentación</i> (Secretariat of Agriculture, Animal Husbandry, Fisheries and Food)
SENASA	<i>Servicio Nacional de Sanidad y Calidad Agroalimentaria</i> (National Agroalimantation Quality and Safety Service)
SMC	WTO Agreement on Subsidies and Countervailing Measures
TAC	Total allowable catch
VA	value added
ZCP	<i>Zona Común de Pesca Argentino-Uruguaya</i> (Argentine-Uruguayan Common Fisheries Zone)

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