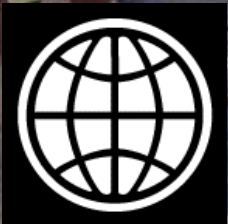


High-Level Roundtable on International Cooperation for Sustainable Development in Caribbean Small Island Developing States

World Bank activities in Fisheries



Presented by
Kieran Kelleher
PROFISH

key messages

- important contribution to growth, poverty, food
- sustainable fisheries is primarily a governance issue
- aquaculture is the world's fastest growing food sector; sustainable aquaculture presents both a challenge and a promise
- since 2005 the Bank has re-engaged through an expanding project pipeline and by establishing the PROFISH partnership

contents

1. why fisheries and aquaculture ?
2. the state of global fisheries
3. what the World Bank is doing



why fisheries?

- relevance to the Millennium Development Goals
 - poverty and livelihoods
 - food and nutrition
 - economic growth
- the crisis, or decline in the world's wild fish stocks



why fisheries - poverty

- livelihoods of over 200 million people
 - 90% of fishers live in developing countries
 - 95% are 'small-scale' fishers
- communities are often marginalized, landless
- HIV is highest in fishing communities



- East Africa 24% fishers (17% truck drivers, 4% farmers)
- Thailand 13-20% fishing crews HIV+ (*national av. 1.5%*)
- Honduras 8% adults in fishing communities (*national av. 2%*)
- USA (Gloucester) 12% mid 1990s (*national av. 0.01%*)



- a pathway out of poverty, or
- a growing poverty trap

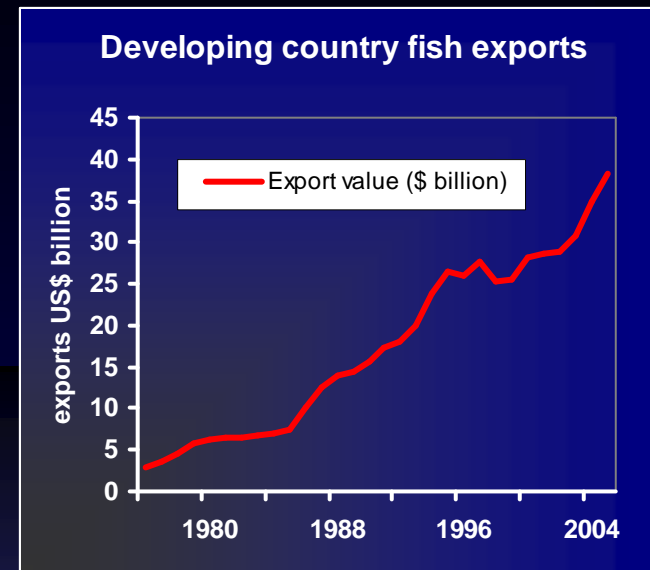
1. why fisheries - food

- fish is the main animal protein for over 1 billion people (global average consumption 16 kg/ capita)
- fish is particularly important in the African diet
 - Africa 8 kg/ capita (half global average) and declining
 - rising food prices, but
 - fish still the lowest priced animal protein on continent
 - fish oils (omega 3) are vital for maternal health and child development

why fisheries

- economic growth

- GDP - more that 6% of GDP in
 - small island states
 - Namibia, Uganda, Ghana & Senegal
- trade
 - > 45% of global fish supply is traded
 - global fish exports are \$80 billion annually
 - ~ 15% of total agricultural trade (incl. forests)
 - 50% of global exports are from developing countries
- public revenues
 - e.g. small island states, Guinea Bissau, Mauritania, Mozambique
 - in conflict states



Seafood:
a \$400 billion industry

the state of world fisheries

- fish production
- the challenge of sustainable aquaculture
- climate change
- the crisis in wild fisheries



wild fisheries 'stagnant'
aquaculture 'exploding'



| source | trends | million tons (2005) |
|----------------|-------------------------------|------------------------|
| wild (capture) | growth stagnant | 94 (66%) |
| aquaculture | growth 8-9% per year | 48 (33%) |
| total | 81% from developing countries | 142 |

| | |
|------------------------------------|-----------|
| human consumption (million tonnes) | 107 (75%) |
| aquaculture % fish food supply | 45% |
| global per capita supply | 16.6 kg |

the world's fastest growing food sector



➤ the promise

- 9% growth per year, now 45% global food fish supplies
- opportunities for poverty alleviation and wealth creation
- market-driven - knowledge and productivity driving fish food prices down and expanding markets
- environmental services (e.g. water management, effluent treatment)

improved aquaculture governance



- the challenge
 - to ensure environmental sustainability
 - to build pro-poor aquaculture
 - growing trade disputes (shrimp, catfish, salmon)
- sub-Saharan Africa
 - less than 1% of global production
 - Africa will need a further 6-9 million tons of fish by 2020 just to maintain current consumption
- improved governance and private investment crucial ... “Doing Sustainable Business”

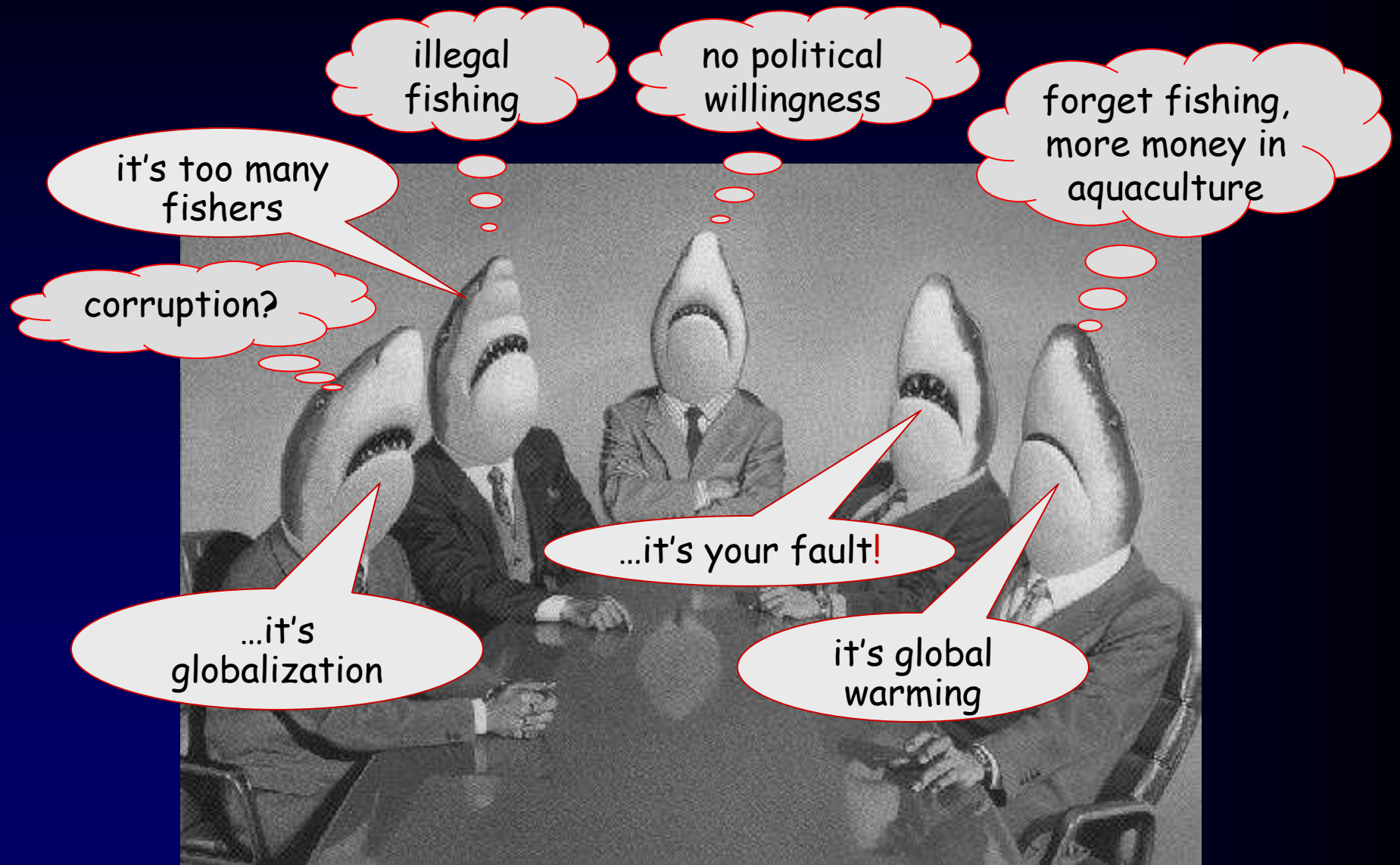
fishing and coastal communities are particularly vulnerable to climate change

- sea-level rise
- species changes
- acid oceans
- coral reefs

more than half of the worlds coral reefs will disappear by 2020



"..... the Global Fish Crisis"





global governance instruments underperforming

- Law of the Sea Convention
- UN Fish Stocks Agreement
- Code of Conduct for Responsible Fisheries
- International Plans of Action on:
 - reduction of (excess) fishing capacity
 - illegal fishing ... others
- WSSD Plan of Implementation
 - “restore the health of fish stocks by 2015”

little progress to “restore the health of fish stocks by 2015”

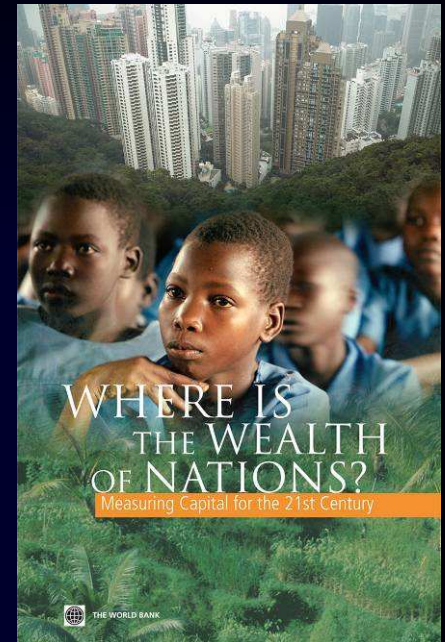
- 75% of stocks fully or overexploited
 - little accountability at country level
- ecosystems are deteriorating
 - fishing down the food chain (e.g. jellyfish)
 - biodiversity decreasing



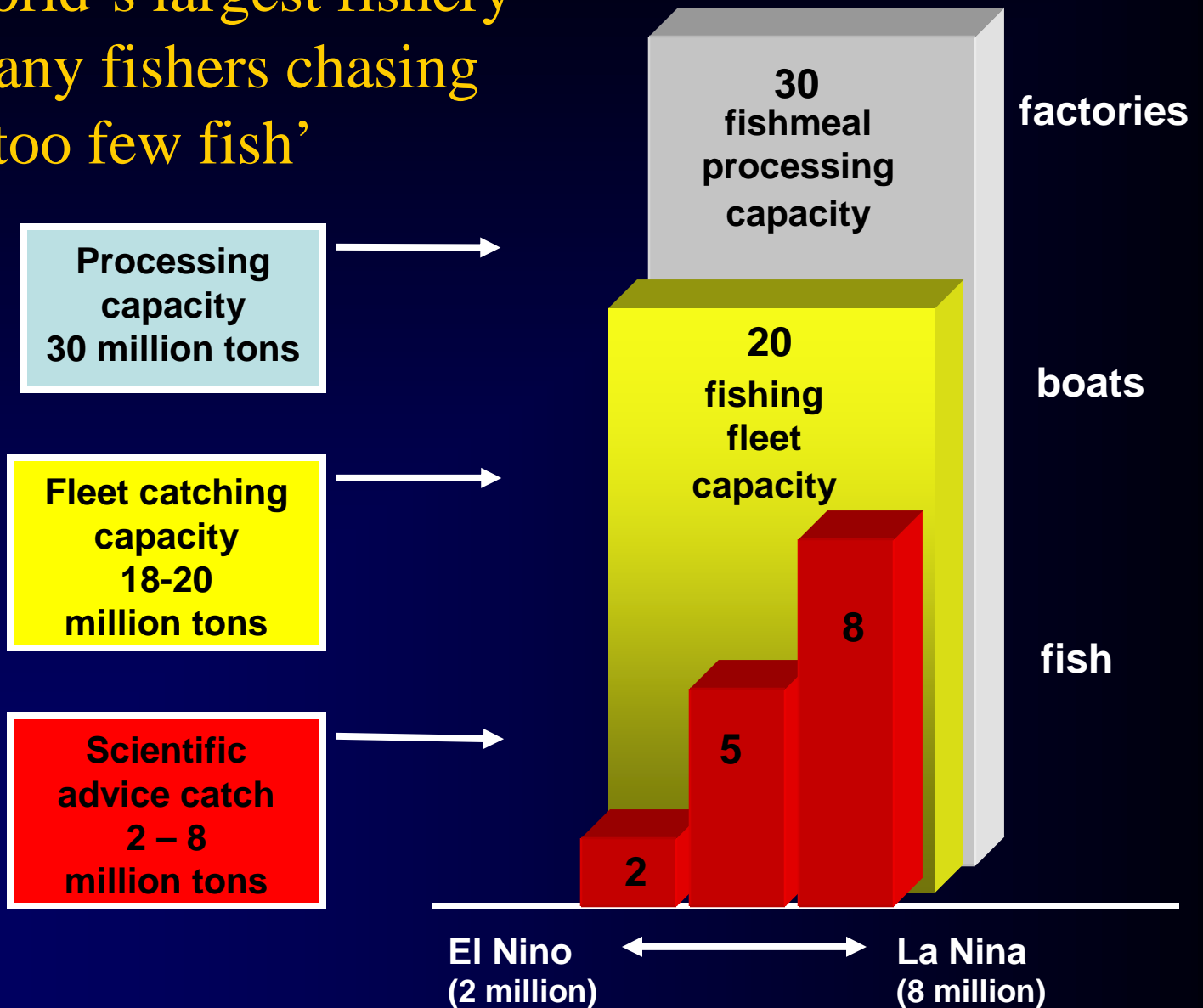
what does this mean in economic terms?

- global fish capital is depleted
- catch per unit of fishing effort* decreasing
- the unit value of the catch decreasing
(high value species are most depleted)
- catching efficiency/ productivity decreasing
- subsidies ~ \$20 billion per year
- growing illegal fishing ~ \$9 billion per year
- loss of potential net benefit ~ \$50 billion per year

* e.g. catch per fishing vessel per fishing day



Peru: world's largest fishery
'too many fishers chasing
too few fish'



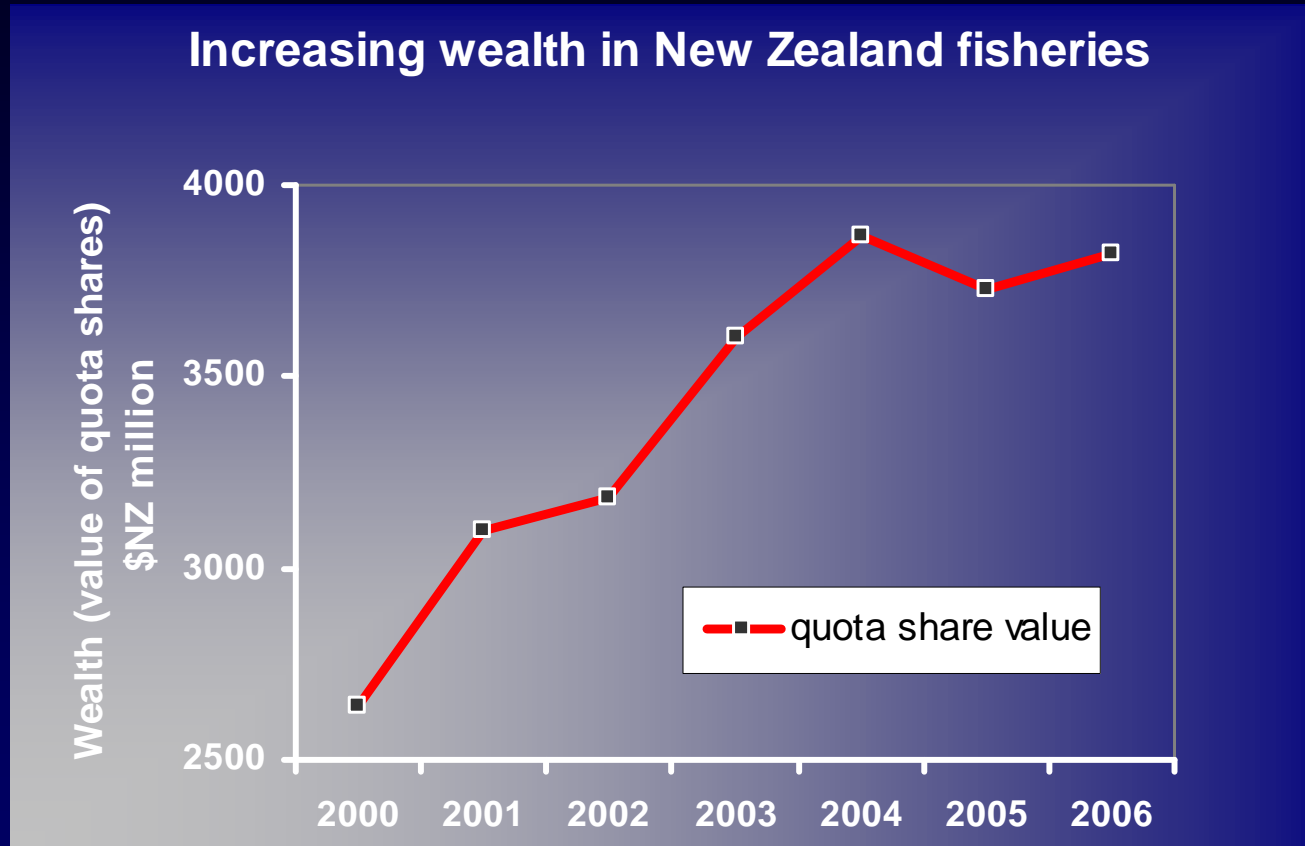
Peru: economic benefits dissipated

- ~ US\$ 100+ million/ year
 - fishing season cut to 60 days
 - seasonal unemployment
 - gluts and poor fish quality
 - lower prices
 - boom and bust economy
 - reduced catch per vessel and per trip



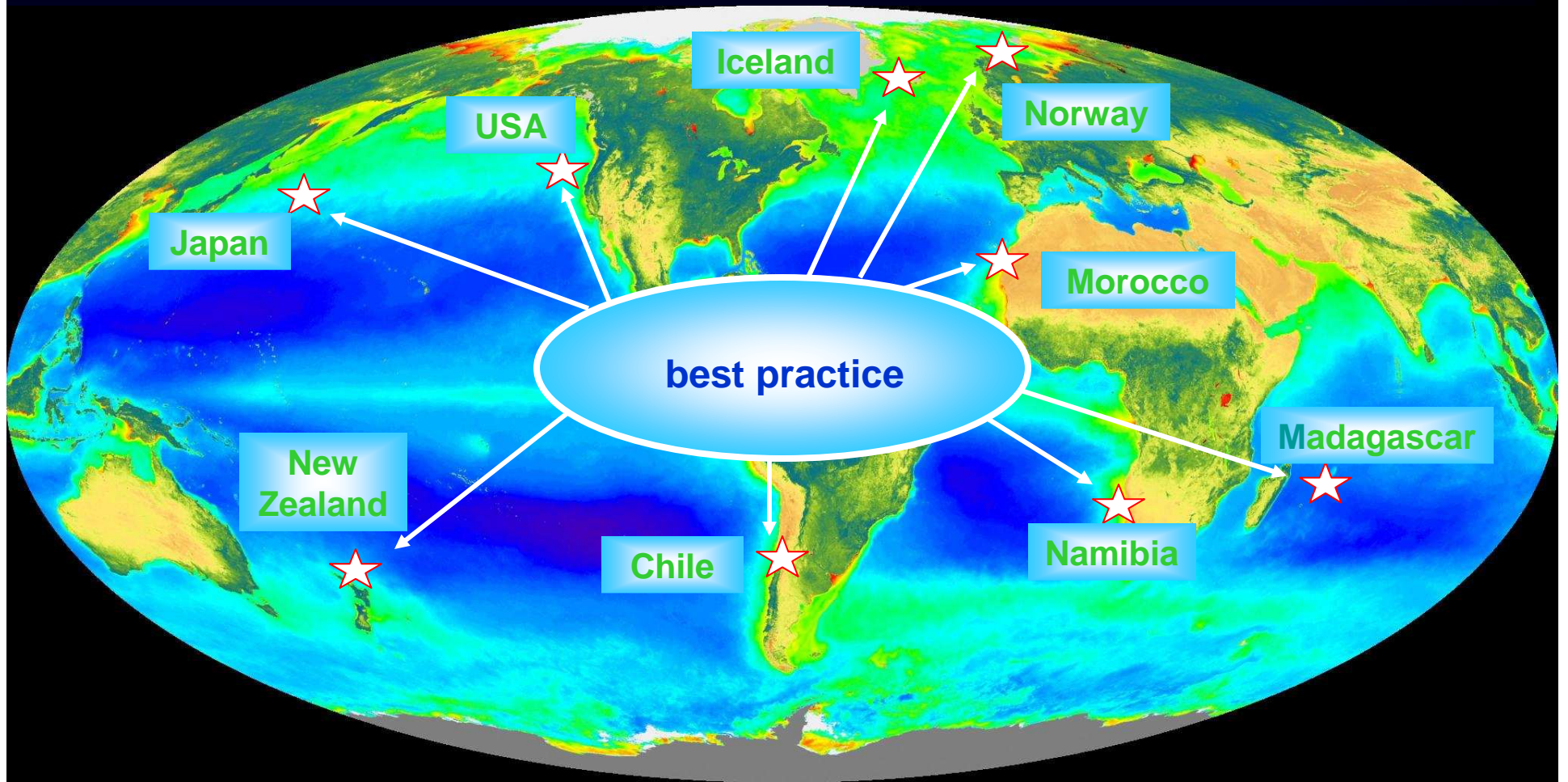
WB Development Policy Loan in preparation

fisheries governance - a better way ...



secure fishing rights, equitable distribution of benefits

a better way ...

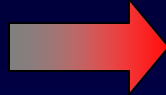


fisheries governance a better way ...



business as usual

- Johannesburg Plan of Implementation
 - focus on fish
 - restore stocks 2015
 - little/no accountability
- public actors
- focus on rules, laws & enforcement



broader governance framework

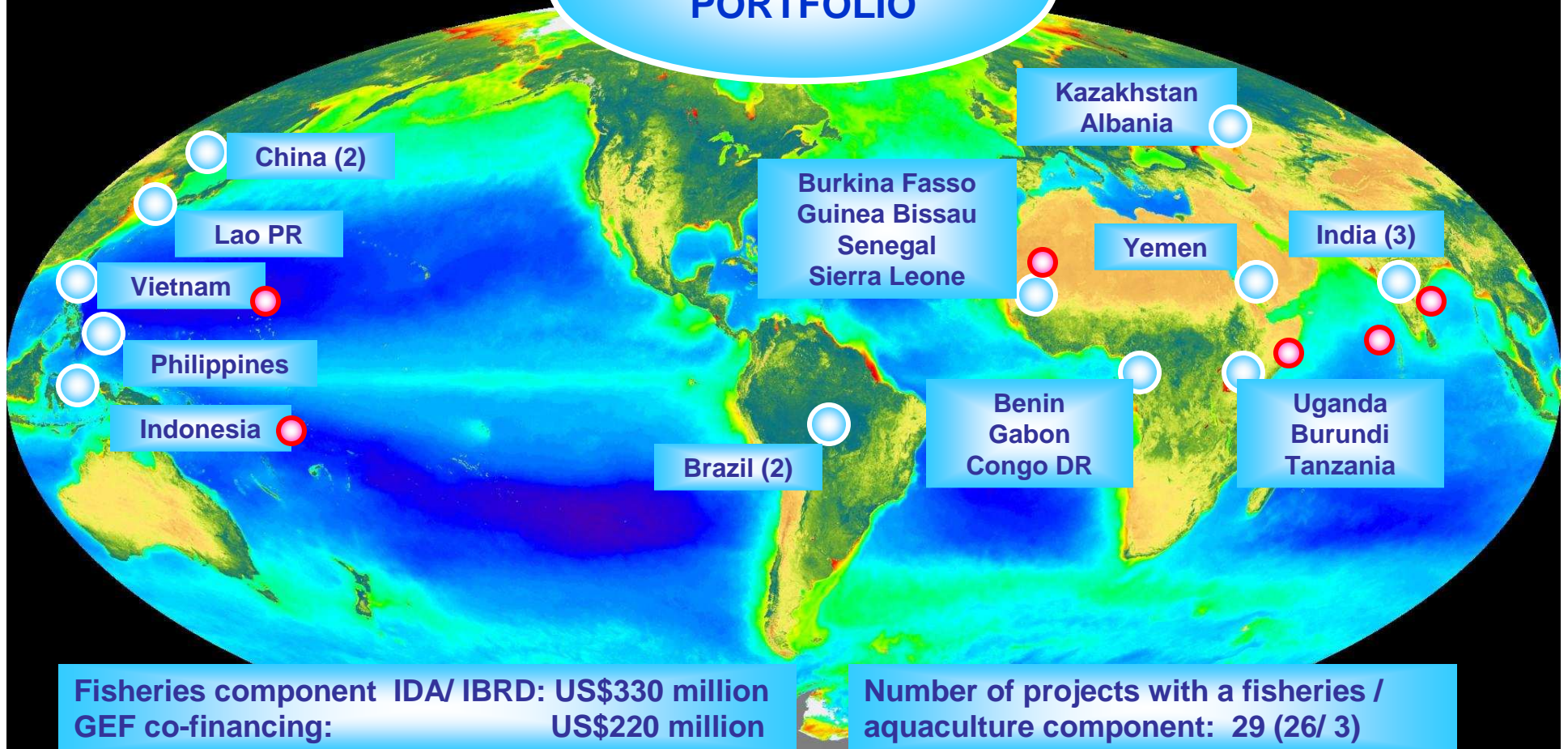
- focus on benefits, incentives
 - limit access, secure tenure
 - incentives driving sustainable use
- public and private actors
 - tackling corruption
 - PPPs – certifying sustainability
e.g. the Marine Stewardship Council

what the World Bank is doing

- the Bank's fisheries portfolio
- established the PROFISH partnership, 2005
 - policy analysis leading to country-level reform
 - creating global goods
- examples – Viet Nam, West Africa



World Bank PORTFOLIO



In preparation



2 examples

PROFISH

Partnership objective:
*‘strengthen governance of the
world’s marine fisheries’*



➤ members

- Developing Countries: African Union; ASEAN Secretariat
- Donors (TF): Iceland is a lead donor
- Technical: FAO, IUCN, WorldFish Center (CGIAR), and others

➤ activities

- country-level sector reform (analyses and donor alignment)
- identifying success stories
- spreading best practices and building awareness
- informing GEF and Bank operations

PROFISH activities



➤ global goods

- estimate global economic losses in wild fisheries
- determine the ‘footprints’ of the small-scale and industrial fleets
- build a new public-private partnership with industry
- establish a global list of irresponsible (illegal) fishing vessels (name and shame list)

➤ analyses in target countries

- Mauritania, Sierra Leone, and West Africa region
- Madagascar, South Africa
- India, Maldives, *South Pacific Islands*, *Seychelles*
- Peru and Viet Nam

Viet Nam: political willingness for reform

➤ problems

Viet Nam fisheries:

- 3-4.5% of GDP

Fish exports:

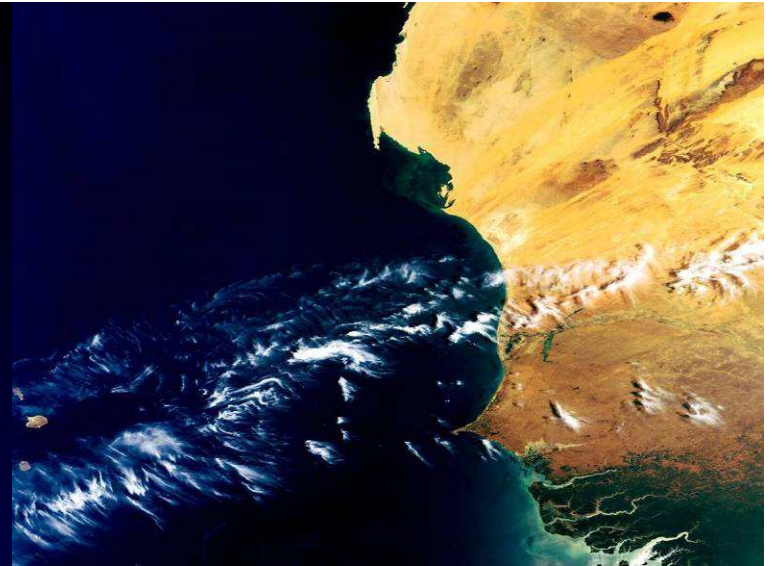
- 7-10% foreign exchange
- value \$3.7 billion (2007)
- annual increase 19%

Mekong:

- 1 million tons catfish/ year



building governance in West African fisheries



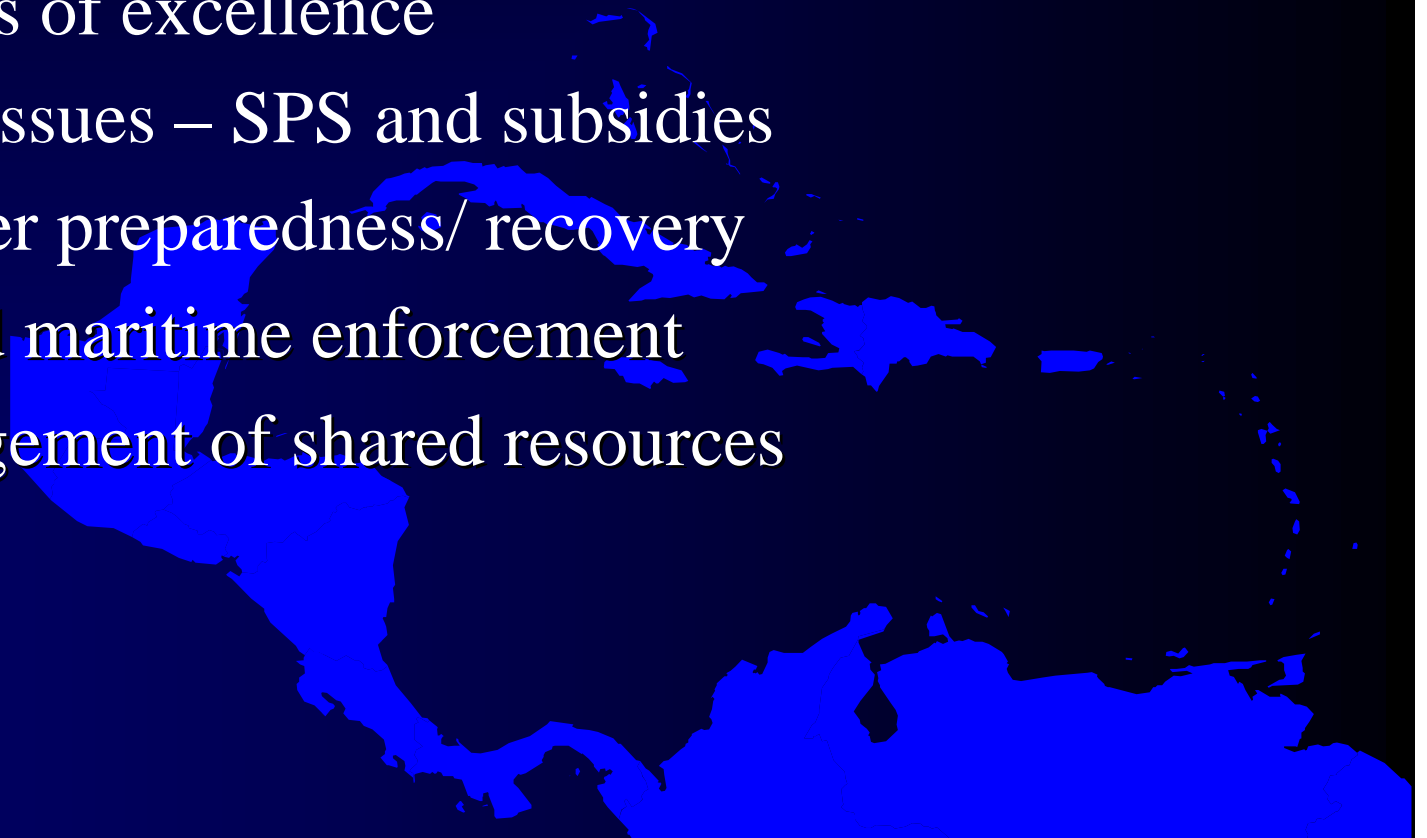
- issues
 - annual catch value \$2.5 billion
 - 25-33% of this value stays in West Africa
- reasons: weak governance and investment climate, foreign industrial fishing, lack of infrastructure to land fish and export, illegal fishing
- project rationale: improved governance and investment climate, greater share for small-scale fishers, combat illegal fishing and corruption
- blending country IDA, regional IDA, GEF and bilateral donor funding

**Cape Verde, Mauritania, Senegal, Gambia,
Guinea Bissau, Guinea, Sierra Leone, Liberia, Ghana**



Caribbean initiatives ...?

- governance reform – wealth-based approaches
- capacity building – North / South network of centers of excellence
- trade issues – SPS and subsidies
- disaster preparedness/ recovery
- shared maritime enforcement
- management of shared resources





a political challenge

- cost-effective maritime enforcement solutions
 - fisheries
 - cruise/ charter vessels and marine tourism
 - safety at sea, weather forecasting
 - pollution monitoring
 - drugs and illegal immigration control
- shared regional multi-tasking gives economies of scale



management of shared resources

- commitment/ political willingness
- common information base
- transparency and equity
- broad-based involvement – fisherfolk
- link efforts to market access
- West African funding model



summary



- fisheries is important for growth, poverty, and food
- a crisis in wild fisheries
 - the crisis has been largely treated as a fish issue, rather than a governance issue
 - solutions exist, but reforms are politically sensitive
- sustainable aquaculture presents both a challenge and a promise as the world's fastest growing food sector, currently a small proportion of the region's fish production
- since 2005 the Bank has re-engaged in fisheries develops its portfolio and partnerships

Thank you

www.worldbank.org/fish

