

August 2006



منظمة الأغذية
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ASIA-PACIFIC FISHERY COMMISSION

Twenty-ninth Session

Kuala Lumpur, Malaysia, 21-23 August 2006

PROVISIONAL AGENDA AND TIMETABLE

Monday, 21 August 2006

08.00 – 09.00	Registration
09.00 – 10.30	1. Opening of the Session
10.30 – 11.00	Morning tea / Coffee
11.00 – 12.30	2. Adoption of the Agenda and arrangements for the Session (APFIC/06/1) 3. Intersessional activities of APFIC (APFIC/06/2) 4. Status and potential of fisheries and aquaculture in Asia-Pacific (APFIC/06/3)
12.30 – 14.00	Lunch
14.00 – 15.30	5. Selected issues of regional importance – the low value / trash fish (APFIC/06/4) - Report from the Regional Consultative Forum Meeting - Country responses - Partners and donor comments
15.30 – 16.00	Coffee / Tea Break
16.00 – 17.30	6. Selected issues of regional importance – co-management, governance and institutions (APFIC/06/5) - Report from the Regional Consultative Forum Meeting - Country responses - Partners and donor comments

Tuesday, 22 August 2006	
09.00 – 10.30	7. Policy challenges (APFIC/06/6) - Report from the Regional Consultative Forum Meeting - Country responses - Partners and donor comments
10.30 – 11.00	Morning Tea / Coffee
11.00 – 12.30	8. Emerging issues (including actions from COFI) (APFIC/06/7) - Report from the Regional Consultative Forum Meeting - Country responses - Partners and donor comments
12.30 – 14.30	Lunch
14.30 – 15.30	9. Work plan of major issues for APFIC focus in subsequent biennium (APFIC/06/8) 10. Other matters
15.30 – 16.00	Coffee / Tea Break
16.00 – 16.30	11. Election of Officers 12. Date and place of the Thirtieth Session of APFIC

16.30 – 17.30 Statements from Partners

Wednesday, 23 August 2006	
08.00 - 12.30	Field Trip
12.30 – 14.00	Lunch
14.00 -	13. Adoption of the Report

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ASIA-PACIFIC FISHERY COMMISSION

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INTER-SESSIONAL ACTIVITIES OF APFIC

Follow-up activities to the Commission's decisions of the Twenty eighth Session

1. At the Twenty-eighth Session of the Asia-Pacific Fishery Commission (APFIC), held in Chiang Mai, Thailand, 3-5 August 2004 (APFIC/06/Inf 3) it unanimously agreed that APFIC should function as a regional consultative forum to provide a means for Members to discuss fisheries issues which have major bearing on the status and potential of fisheries and aquaculture across the region and to formulate recommendations for action. Progress towards meeting this goal was reviewed by the APFIC Executive Committee's Seventieth Session, held in Kuala Lumpur, Malaysia, 23-25 August 2005, who provided valuable guidance (APFIC/06/Inf 4).

2. Taking into account the number and diversity of Regional Fishery Bodies and other relevant international organisations and arrangements in the region, the Commission agreed that APFIC was best suited to take on this regional coordinating role and to promote cooperation amongst these organisations and arrangements. It was also suggested that APFIC could also serve as a clearing house for information related to these organisations and arrangements, including statistics.

3. The Commission also concurred with the recommendations of the Fourth Session of the FAO Advisory Committee on Fisheries Research (ACFR) held in 2002 and the Twenty-fifth Session of the Committee of Fisheries (COFI) held in 2003 that problems associated with small-scale fisheries and aquaculture development both in inland and marine waters needed greater attention, considering this sub-sector's contribution to national social and economic development. The Commission agreed that the theme for 2004/06 biennium and the 2006 Regional Consultative Forum Meeting (RCFM) should be small-scale fisheries (both marine and inland capture fisheries) and rural aquaculture.

4. It encouraged the APFIC Secretariat to facilitate increased dialogue to identify and find solutions to issues relating to small-scale fisheries and rural aquaculture, especially trade and sustainable management. In assisting this transformation of APFIC into the proposed regional consultative forum, the Commission recommended that a range of activities be performed, including:

- provision of information via a website;
- focused publications;
- direct advice to members;
- regional consultative workshops; and
- preparation for a “flagship” biennial RCFM.

5. It was agreed that the RCFM would constitute a regular activity of APFIC and would provide visibility of fisheries problems and issues in the Asia-Pacific region that could also be communicated at the global level.

6. Since the Twenty-eighth Session, APFIC has achieved the following:

(i) Developed the APFIC website <http://www.apfic.org> (official launching held during the Seventieth Session of the APFIC Executive Committee). The website has proved to be an excellent medium for providing information, especially after the December 26, 2004 tsunami, and providing a linkage to other Regional Fishery Bodies, organizations and arrangements. The website is also a portal for all forms of fishery information.

(ii) Produced 19 publications (APFIC/06/2 Addendum 1). These included:

- Reports of APFIC meetings (APFIC Executive Committee Sixty-ninth Session; APFIC Twenty-Eighth Session; APFIC Executive Council Seventieth Session);
- Reports on two strategic regional tsunami rehabilitation workshops (in collaboration with CONSRN partners (see below));
- Regional Strategic Framework for tsunami rehabilitation (in collaboration of CONSRN partners);
- Reports on the two APFIC Regional Consultative Workshops – Low value/”trash” fish and Mainstreaming fisheries co-management;
- Technical reviews on Low value/”trash” fish and Mainstreaming fisheries co-management as input into the Regional Consultative workshops;
- Publications on the introduction and expansion of white shrimp into Asia, small-scale fisheries research, stock enhancement practices in inland waters, tsunami rehabilitation, and the history of industrial marine fisheries in Southeast Asia.

(iii) APFIC has also provided direct advice to members. Full listing is at APFIC/06/2 Addendum 2. This included:

- Technical inputs and Secretariat support to FAO Technical Consultations (2), and Regional/International Workshops (8);
 - Technical inputs into other UN agency's Regional Workshops (2);
 - Technical assistance into national workshops (2);
 - Backstopping for FAO (both regional and country) projects (18); and
 - Planning and project development missions (3)
- (iv) Organised and successfully completed 4 major regional consultative workshops:
- Rehabilitation of Fisheries and Aquaculture in Coastal Communities of Tsunami Affected Countries in Asia, Bangkok, Thailand 28 February – 1 March 2005;
 - Low Value and “Trash Fish” in the Asia-Pacific Region, Hanoi, Viet Nam 7-9 June 2005;
 - “Mainstreaming” fisheries co-management, Siem Reap, Cambodia, 9-12 August 2005; and
 - One-year later - Rehabilitation of Fisheries and Aquaculture in Coastal Communities of Tsunami Affected Countries in Asia, Bangkok, Thailand, 1-3 March 2006.
- (v) In preparation for the “flagship” Regional Consultative Forum Meeting in Kuala Lumpur, Malaysia, 16-19 August 2006, the APFIC Secretariat organised the program, participants and, with assistance from INFOFH, the logistics. This also included commissioning background reviews on the history of industrial fishing in Southeast Asia and the Pacific, policy drivers and directions in APFIC Member countries and illegal, unreported and unregulated fishing (IUU) in the APFIC-Pacific region.

Collaboration with other international/regional bodies

7. The APFIC Secretariat has actively pursued collaboration with a number of regional organizations (full list of activities is given in Addendum 3), including:

- Bay of Bengal Intergovernmental Organization (BOB-IGO);
- INFOFISH
- Mekong River Commission (MRC);
- Network of Aquaculture Centres in Asia-Pacific (NACA);
- Secretariat of the Pacific Community (SPC);
- Southeast Asian Fisheries Development Centre (SEAFDEC);
- The WorldFish Centre (WorldFish); and
- World conservation Union (IUCN);

Other activities related to the Commission's activities

8. The APFIC Secretary, Dr Derek Staples, participated in the FAO Regional Fisheries Body (RFB) meeting in Rome 14-15 March 2005. Its agenda included (i) review

of decisions from 26th Session of COFI relevant to RFBs; (ii) information on the role of RFBs; (iii) external factors affecting fisheries management; (iv) approaches to incorporate ecosystems considerations into fisheries management by RFBs; (v) harmonization of catch documentation; (vi) relations between regional fishery bodies and UNEP; and (vii) status of FIGIS/FIRMS.

9. The APFIC Secretary has also been actively supporting the development of the Bay of Bengal Large Marine Ecosystem project, approved by the Global Environment Facility (GEF) in 2005. The project has been endorsed by seven of the eight Bay of Bengal countries (Bangladesh, India, Indonesia, Malaysia, the Maldives, Sri Lanka and Thailand), and is currently seeking co-financing.

10. Following the devastating tsunami on 26 December, 2004, the APFIC Secretariat has been very active in providing regional coordination of activities, as well as providing direct in-country support. Immediately after the event, the APFIC Secretariat joined hands with 5 other regional fisheries/aquaculture bodies: the Bay of Bengal Program – Intergovernmental Organization (BOBP-IGO), the Network of Aquaculture Centers for Asia Pacific (NACA), the Southeast Asian Fisheries Development Center (SEAFDEC) and the WorldFish Center (WorldFish) to form the “Consortium to Restore Shattered Communities in Tsunami- affected Nations” (CONSRN). The consortium was particularly effective in pooling intelligence on the impact on the tsunami from its different networks, as well as facilitating coordination of tsunami responses. The APFIC Secretariat has been directly involved in FAO emergency relief projects, especially in Sri Lanka, Thailand and Indonesia. As part of the UN Flash appeal, FAO has been responsible for a portfolio of 75 projects, valued at US\$ 61.22 million. As these projects wind down, the APFIC Secretariat, through a Sida-funded “Coordination and Technical Support Unit” project, has been assisting in the development of longer-term rehabilitation programs and projects for the tsunami-affected Members.

Other FAO Regional Office for Asia and the Pacific activities of relevance to APFIC

11. Projects addressing the national issues of fisheries and aquaculture development are ongoing in Bangladesh, Cambodia, India, Pakistan, DPR Korea, and Viet Nam. Regional Technical Cooperation projects to assist in the implementation of the FAO Code of Conduct for Responsible Fisheries through regional initiatives, especially environmental and social sustainability, improved trade and information, are being addressed by the regional projects “Poverty Alleviation through Improved Aquatic Resources Management in Asia”; “Elaboration of a National Plan of Action to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing”; “Addressing the Quality of Information on Inland Fisheries (AQUIIF)”; “Strengthening National Capabilities in Seafood Trade Policy, including Risk Assessment and Traceability”; and the “Tonle Sap Environmental Management Project Component 2: Organizing Communities for Natural Resource Management of the TSBR”. Many of these projects are being lead by FAO Headquarters in Rome, although APFIC Secretariat is often requested to carry out backstopping missions.

12. FAO has also been assisting member countries in the areas of legislative and policy reform in fisheries through regional and national projects in Pakistan, Cambodia and Pacific Island countries.

13. Two major projects being lead from the FAO Regional Office in Bangkok are due to be completed in 2006. These are, firstly the Sida-funded “Strengthening the Capacity for Gathering Information for Fisheries Management “ (GCP/RAS/199/SWE) in Cambodia, Timor Leste, Thailand and Viet Nam, to be completed later this year. Through the collection and dissemination of information relating to socio-economics of coastal communities, fishery-related issues of those communities and conflicts between different users of the fishery resources, the project is assisting governments in raising awareness of their policies, and in the case of Viet Nam and Thailand considering actions necessary to reduce fishing capacity. Secondly, the FAO implemented UNDP project on “Empowerment of Coastal Fishing Communities for Livelihood Security” (BGD/97/017) in Cox’s Bazaar, Bangladesh is currently considering an effective exit strategy that focuses on providing an on-going consultative environment through the development of an active policy framework that supports the coastal fishers and their organizations.

SUGESTED ACTION BY THE COMMISSION

14. The Commission is invited to note the inter-sessional activities and consider them further under Agenda item 7 and 8. It may wish to highlight any obvious gaps for appropriate action of the Secretariat.

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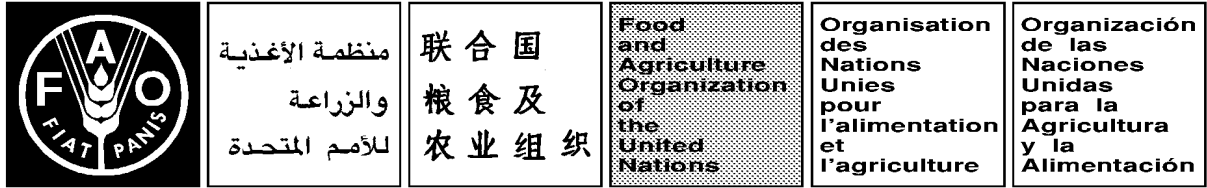
INTER-SESSIONAL ACTIVITIES OF APFIC

APFIC PUBLICATIONS in the 2004/06 biennium

2004		
1	Report of the Sixty-ninth Session of the APFIC Executive Committee, Pattaya, Thailand, 15-16 December 2003	RAP Publication 2004/02
2	Introductions and movement of <i>Penaeus vannamei</i> and <i>Penaeus stylirostris</i> in Asia and the Pacific	RAP Publication 2004/10
3	Report of the FAO-ASEAN Strategic Planning Workshop on Harmonization of Standards for Shrimp Export-Import	RAP Publication 2004/07
4	Handbook on regional fishery bodies and arrangements in Asia and the Pacific	RAP Publication 2004/12
5	Proceedings of the Second International Symposium on the Management of Large Rivers for Fisheries Volume I	RAP Publication 2004/16
6	Proceedings of the Second International Symposium on the Management of Large Rivers for Fisheries Volume II	RAP Publication 2004/17
7	Report of the 28 th Session of APFIC, Chiang Mai, 3-5 August 2006	RAP Publication 2004/19
8	A research agenda for small-scale fisheries	RAP Publication 2004/21
9	Status and potential of fisheries and aquaculture in Asia and the	RAP Publication 2004/25

2005		
10	Regional workshop on rehabilitation of fisheries and aquaculture in coastal communities of tsunami affected countries in Asia	RAP Publication 2005/06
11	Regional strategic framework for rehabilitation of fisheries and aquaculture in tsunami affected countries in Asia	RAP Publication 2005/09
12	A review of stock enhancement practices in inland water	RAP Publication 2005/12
13	Asian fisheries today : The production and use of “trash fish” from marine fisheries in the Asia-Pacific Region	RAP Publication 2005/16
14	Report of the 70 th Session of Asia-Pacific Fishery Commission Executive Committee	RAP Publication 2005/22
15	Report of the APFIC Regional Workshop on Low-value and “trash fish” in the Asia-Pacific Region	RAP Publication 2005/21
16	Report of the APFIC Regional Workshop on Mainstreaming Fisheries Co-management	RAP Publication 2005/23
17	Papers on Mainstreaming fisheries co-management in the Asia-Pacific	RAP Publication 2005/24
2006		
18	Report of the Regional Workshop on One year later- The rehabilitation of fisheries and aquaculture in coastal communities of tsunami affected countries in Asia	RAP Publication 2006/08
19	History of Industrial Marine Fisheries in Southeast Asia	RAP Publication 2006/12

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INTER-SESSIONAL ACTIVITIES OF APFIC

**Direct advice to Members in the 2004/06 biennium
(backstopping of projects only includes 2005/06)**

Regional/national consultations and workshops

- Regional Workshop on Vessel Monitoring Systems, Bangkok (6-8 October 2004)
- Regional Workshop on IUU, Penang (10-14 October 2004)
- UNEP/GEF 5th Meeting of the Regional Working Group for the Fisheries Component, Phu Quoc, VietNam (11-14 October 2004)
- FAO/China International Workshop on Shrimp Healthy Culture Management, Beijing (14-17 November 2004)
- Technical Consultation on Sea Turtles Conservation and Fisheries, Bangkok (29 November – 2 December 2004)
- DOF/EU-CHARM “Fishing Communities and Livelihoods in Tsunami Aftermath”, Phuket, Thailand (14-15 February 2005)
- Bangladesh National Fishery Strategy, Dhaka (13-17 December 2004 and 16-20 May 2005)
- 26th COFI, Rome (7-11 March 2005)
- Vietnam national fishery strategy, Hanoi (26-27 April 2005)
- FAO Expert Workshop on Development of Technical Guidelines for the Responsible Movement of Live Aquatic Animals, Dambulla, Sri Lanka, 30 October – 5 November 2005
- FAO/NACA Workshop on “A Regional Approach for Responsible Development of Mariculture in the Asia-Pacific Region” Guangzhou, China 7-11 March 2006
- FAO Workshop on the Review of Global Aquaculture Development Trends and Prospective Analysis, Guangzhou, China, 12-15 March 2006
- FAO Expert Workshop on Use of Feed and Fertilizer for Sustainable Aquaculture, Wuxi, China, 18-21 March 2006

- FAO Expert Workshop on Freshwater Seed as Global Resource for Aquaculture, Wuxi, China, 23-26 March 2006
- UNEP First Regional Partners Workshop on Regional Coordination Mechanisms in the East Asian Seas Region, Bangkok (9-10 May 2005)
- Regional Workshop on the Elaboration of National Plans of Action to Prevent, Deter and Eliminate Illegal, Unreported and Unregulated Fishing in the South Asian Subregion, Bangkok (19-23 June 2006)
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Project backstopping, 2005-2006

- BGD/97/017 workshop on project exit strategy, workshop on the Code of Conduct for Responsible Fisheries, Stakeholders meeting, Cox's Bazar and Dhaka (17-29 May 2005)
- GCP/RAS/199/SWE national inception workshop, Hanoi (28-29 April 2005)
- GCP/RAS/199/SWE review of project progress and implementation and attend inception workshop, Timor Leste (25-27 May 2005)
- BGD/97/017 workshop on participatory management and conservation of coastal fisheries resources and project exit strategy, Cox's Bazar (11-17 July 2005)
- UNDP/FAO/DFID post-tsunami rehabilitation in India, Chennai (16-27 January 2006)
- TCP/CMB/3004 inception workshop for fisheries capacity-building, Sihanouk Ville, Cambodia (1-2 February 2006)
- BGD/97/017 review project reports and documents, Cox's Bazar and Dhaka (7-11 May 2006)
- UNDP/FAO/WB preliminary assessment mission to tsunami affected provinces, Phuket and Phangnga, Thailand (4-7 January 2005)
- TCP/DRK/2902 conclusion of activities and preparation of terminal report; TCP/DRK/3001 discussion of progress and further needs; assistance with TCP request for support to marine fishery culture development, Pyongyang (18-26 February 2005)
- TCP/RAS/2908 STREAM final workshop, Los Banos (16-19 March 2005)
- UTF/CMB/015/CMB project planning meeting, Siem Reap (4-6 May 2005)
- Assist the Real Time Evaluation team (RTE) in the assessment of FAO's project response to tsunami, Phuket & Phangnga, Thailand (31 May – 1 June 2005)
- Organize the TCP/RAS/3013 (AQUIIF) Regional Inception and Planning Workshop, Yangon (16-18 June 2005)
- Australia-Indonesia project development meeting (tsunami), Banda Aceh (23-29 November 2005)
- Planning Meeting on Aquatic Biodiversity in Rice-based Ecosystems for Lao PDR, Vientiane (7-8 December 2005)
- TCP/RAS/3013 (AQUIIF) national stakeholders consultation workshop, Socorro, Philippines (14-15 December 2005)
- GCP/RAS/199/SWE national workshop, Surat Thani, Thailand (12-13 January 2006)
- UTF/CMB/015/CMB project progress discussion and planning meeting for provincial implementation units, Siem Reap (1-3 February 2006)
- GCP/VIE/029/ITA monitoring and evaluation of project activities, Hue, Viet Nam (6-10 February 2006)
- TCP/RAS/3013 (AQUIIF) Second Regional Workshop, Kota Kinabalu, Malaysia (18-23 April 2006)

- TCP/PAK/3005 final national/federal workshop and high-level meeting for follow-up activities and implementation, Islamabad (14-24 May 2006)
- Laos fishery legislation development, Vientiane (5-7 June 2006)
- GCP/AFG/029 & 036/UK review potentials of aquaculture development in Afghanistan, Kabul and Herat (13-19 June 2006)

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INTER-SESSIONAL ACTIVITIES OF APFIC

Collaboration with other international/regional bodies

Collaborative activities with APFIC's regional partners and sub-regional partners has included:

Bay of Bengal Intergovernmental Organization (BOB-IGO)

- 1st Governing Council Meeting of the Bay of Bengal Programme – Inter Governmental Organization, Chennai, 7-8 September 2004
- 2nd Governing Council Meeting of the Bay of Bengal Programme – Inter Governmental Organization, Colombo, 12-13 December 2005

World conservation Union (IUCN)

- WWF/IUCN Regional Workshop on Values and Functions of the Mekong Floods – Developing Information for a Balanced Dialogue, Vientiane, 26-28 October 2004
- IUCN Congress, Bangkok, 18-20 November 2004

Mekong River Commission (MRC)

- 12th Annual Meeting of the Mekong River Commission Programme for Fisheries Management and Development Cooperation, Siem Reap, 2-3 June 2005
- 7th Technical Symposium on Mekong Fisheries and Deep Pools Workshop, Ubon Ratchathani, Thailand, 15-17 November 2005

Network of Aquaculture Centres in Asia-Pacific (NACA)

- NACA AGM Health Meeting, Bangkok, 23-26 November 2004
- 16th Governing Council of the Network of Aquaculture Centres in Asia-Pacific, Los Banos, 21-23 March 2005

- 8th Technical Advisory Committee Meeting of the Network of Aquaculture Centres in Asia-Pacific, Tehran, 1-3 October 2005
- 17th Governing Council of the Network of Aquaculture Centres in Asia-Pacific, Tehran, 25-28 February 2006

Secretariat of the Pacific Community

- 4th South Pacific Community Fisheries Meeting, Noumea, 28 August – 3 September 2004
- FAO/SPC Regional Training Workshop on Coastal Fisheries Management and Statistics, Nadi, 15-19 November 2004

Southeast Asian Fisheries Development Centre (SEAFDEC)

- SEAFDEC Preparatory Expert Meeting on Fishing Capacity and Related HRD Needs in the ASEAN Region, Bangkok, 14-16 September 2004
- ASEAN-SEAFDEC RTC on Right-based Management for Small-scale Coastal Fishery, Bangkok, 23-26 November 2004
- FAO/SEAFDEC Regional Workshop on the Improvement of Fishery Data and Information Collection Systems, Bali, 15-18 February 2005
- SEAFDEC Regional Program Planning Meeting for the Special 5-year Program on Sustainable Fisheries for Food Security in the ASEAN Region (2006-2010), Bangkok, 22-25 February 2005
- 27th SEAFDEC Program Committee Meeting, Langkawi, 5-8 December 2004
- 37th SEAFDEC Council Meeting, Hanoi, 5-8 April 2005
- 38th SEAFDEC Council Meeting, Brunei, 18-21 April 2006

WorldFish Centre

- WFC Science Week, Penang, 22-25 August 2004
- CGIAR Science Council - System Priorities Technical Meeting, Rome, 26-27 January 2005
- FAO/WorldFish Centre Workshop on Interdisciplinary Approaches to the Assessment of Small-Scale Fisheries, Rome, 20-22 September 2005

INFOFISH

- 19th Meeting of the INFOFISH Technical and Advisory Board (TAB), Kuala Lumpur, 4-5 July 2005

Other Regional activities:

- FAO/NACA/WFC Workshop Preparedness and Response to Aquatic Animal Health Emergencies, Jakarta, 21-23 September 2004
- 51st Meeting of the Standing Committee of CITES, Bangkok, 4-5 October 2004
- IOC/WESTPAC Workshop on Post-disaster Assessment and Monitoring of Changes in Coastal, Ocean and Human Systems in the Indian Ocean and Asian Waters, Phuket, Thailand, 19-21 February 2006
- 8th Pacific Rim Fisheries Conference, Hanoi, 22-24 March 2006
- 12th Programme Steering Committee Meeting of PEMSEA, Davao, Philippines, 1-3 August 2006
- Annual Meeting of the World Aquaculture Society Meeting, Bali, 14-18 May 2005

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STATUS AND POTENTIAL OF FISHERIES AND AQUACULTURE IN ASIA AND THE PACIFIC

1. The full draft report on the “Status and Potential of Fisheries and Aquaculture in the Asia-Pacific” region appears as document APFIC/04/Inf 9. It consists of six chapters that describe:

- Contribution of fisheries and aquaculture in the Asia-Pacific region
- Production trends of fisheries and aquaculture
- Status of the fishery resources
- Aquaculture production trends by species group
- Selected issues facing fisheries and aquaculture in Asia and the Pacific
- The outlook for fisheries and aquaculture in Asia and the Pacific

Contribution of fisheries and aquaculture in the Asia Pacific region

2. Although fisheries and aquaculture does not contribute that significantly to the GDP of many Asian countries, its importance is underestimated if this is the only statistic used to assign relative value of a sector. The fisheries and aquaculture sector contributes significantly to poverty reduction and food security, right across the APFIC region. It provides food security, indirectly by providing income and employment to millions of people, and directly by providing food and nutrition to many, especially the poor. It is an important source of animal protein, micronutrients, minerals and essential fatty acids. In many rural areas it forms an integral part of the people’s livelihoods, and in some cases, a social safety net in times of hardship.

3. . Despite its perishable nature, trade in fish and fishery products is higher than many other commodities including coffee, rice and meat, and is expanding rapidly. Fish exports, especially shrimp and tuna are major foreign income earners for many countries.

4. Fish consumption is relatively high in many Asia and Pacific countries. Unfortunately, we do not have good estimates of this. Many reported figures of per capita consumption have been calculated indirectly from reported fish production figures and

population estimates and are, therefore, subject to errors. According to independent surveys, fish consumption in Bangladesh, Loa PDR and Viet Nam, has been estimated at around 10-20 kg/capita/year, while in Cambodia it can be as high as 50-60kg/capita/year. In contrast, in India where a vegetarian diet is common, fish consumption is considerably lower.

Production trends of fisheries and aquaculture

5. The Asia-Pacific region is the world's largest producer of fish, both from aquaculture and from capture fisheries (51 percent and 91 percent, respectively). In 2004, this amounted to 54,340 million tonnes from aquaculture and 46,710 million tonnes from capture fisheries. This represents an increase of 3% and 12.5% over new estimates for 2002 for capture fisheries and aquaculture, respectively. Aquaculture production is now greater than that of capture fisheries. It is also a common knowledge in the region that production from many small-scale operators, especially in inland areas, is not recorded. Of the top ten producers of capture fish, five States were from the Asia-Pacific region (China (1st), Indonesia (5th), Japan (6th), India (7th) and Thailand (9th). For aquaculture, China alone is reported to have produced 70 percent of the world's aquaculture production (about four times greater than Peru's fisheries production, the number two fishery producer world-wide).

6. The production from marine capture fisheries has slowed down considerably during the last decade after reaching a plateau in 1995. China (China PR, Hong Kong SAR and Taiwan POC) remains by far the largest producer in the region (four times greater than Indonesia which is the second producer) and its catch increased until it introduced its "zero growth" policy in 1998. For the rest of the region (without China), the marine capture fisheries production peaked in 1989 at 24.7 million tonnes and has gradually declined since then. More significantly, demersal fish production achieved its highest level of 5.2 million tonnes as early as 1974 and then declined to its lowest level at 3.7 million tonnes in 1983. It has since increased slowly but not back to the mid-1970's level. Pelagic fish followed the same upward and downward trend reaching its peak in 1988.

7. It is important to recognize that the region's catches are dominated by small pelagic fish (Japanese jack mackerel, Japanese anchovy, chub mackerel, Pacific saury, Indian oil sardine, Indian mackerels and scads). In some sub-regions, benthopelagic species are also important - the large-head hairtail has an annual production of approximately 1.4 million tonnes from China alone (greater than the total production for the whole of Oceania). Although some of the small pelagics are used for human consumption or processed into products such as fish sauce, a large proportion is used as aquaculture and other animal feed. The increasing demand for low-value/trash fish as aquaculture feed is one of the major drivers of increasing fishing pressure on fish stocks in the region. Generalizations of trends based on classical analyses of demersal fisheries need to be applied with caution.

8. Production has continued to increase in inland waters, showing a remarkable growth in the 1990s. This period, however, also coincided with changes in the reporting and estimation of inland water catches that may also be reflected in the figures. It is generally known that inland production figures are grossly underestimated for the Mekong River basin, and the same is probably true in other remote rural areas.

9. The growth in aquaculture has been very strong over the past 10 years, but much of this is driven by the enormous contribution of China. However, even without China, unlike the temperate regions, growth has been steady, with aquaculture production from inland

waters doubling since 1990. Although the main species being produced in inland waters are Chinese and Indian carps, the number of carnivorous species is increasing. In marine waters, high-valued carnivorous species such as penaeid shrimp, jacks, sea breams and salmon dominate, although milkfish production is still high, especially in the Philippines. This increasing trend for intensive aquaculture of carnivorous species is putting increasing pressure on the demand for fish meal/oil, especially from South America.

10. There is considerable variation in these general trends among the five main sub-regions of Asia and the Pacific. Much of the growth in both aquaculture and capture fisheries has come from China, South Asia and Southeast Asia. Areas such as Japan, Korea RO experienced a steady decline in the supply of capture fish, and the aquaculture has remained relatively stable. Oceania's production is minor compared with the other sub-regions, but continues to increase, although many of the fisheries in the Pacific small Island States that operate at a subsistence level are not recorded.

Status of the fishery resources

11. Unlike temperate fisheries that are based on large populations of a relatively limited number of species, the status of fishery resources in the region can not be based on the "science" of stock assessment. Providing reliable stock assessments of the hundreds of species of fish taken by the multi-species, multi-gear fisheries throughout much of Asia-Pacific is not even worth contemplating, although it can be useful for a few key species, such as tuna and large-head hairtail. Evidence on the status of the fisheries, therefore, needs to be gathered from several sources including:

- Historical trends of fisheries in the region;
- Scientific trawl surveys carried out over several decades in the same locations;
- Stock assessments of key species;
- Trends of catches from the region's seas and Large Marine Ecosystems; and
- Anecdotal evidence from fishers.

12. APFIC has recently commissioned two studies on the historical trends of fisheries development in the both the Southeast Asian sub-region and in the Pacific sub-region. The Southeast Asia region is particularly revealing. Up until the advent of large-scale industrial fishing, the region's fisheries were able to sustain the livelihoods of those dependent on them. Industrial fishing began with the early influx of pearl fishers, but the most significant and damaging change occurred around the mid 1960s with the introduction of the otter trawl into Southeast Asia.

13. Scientific surveys provide one of the best indicators of resource status as they are based on repeatable methods and scientific accuracy. The WorldFish Centre coordinated the analyses of trawl surveys conducted in different areas of the region (Trawl base)¹. This provided a graphic account of the decline in status of demersal resources. In areas where trawl surveys were conducted for more than 25 years, the amount of fish available to fishers had declined to be only between 6 and 33 percent of the original abundance. In all surveys

¹ Silvestre, G.T., Garcés, L.R., Stobutzki, I, Ahmed, M, Santos, R.A.V., Luna, C.Z., Lachica-Alino, L., Christensen, V., Pauly, D. and Munro (eds.) (2003) Assessment, Management and Future Directions for Coastal Fisheries in Asian States. WorldFish Centre Conference Proceedings 67,1 120pp.

recorded, the amount of fish had declined, some as much as 40 percent in five years. The most dramatic declines were in the Gulf of Thailand and the East Coast of Malaysia.

14. Changes in the composition of the fish resources also occurred. In these demersal fisheries, the abundance of larger more valuable species (e. g. groupers, snappers, sharks and rays) has declined, while the proportion of smaller fish that are lower down the food chain has notably increased. This effect is known as “fishing down the food chain”. Preliminary ecosystem modeling using Ecopath and Ecosim are also demonstrating these changes in the demersal fisheries of the region.

15. As noted above, the dominant catch from the region comes from small pelagic fish and results pertaining to coastal demersal fisheries should not be applied indiscriminately to all fisheries in the APFIC region. In an attempt to describe the status of all fishery resources, catch data from all the Large Marine Ecosystems (LMEs) in the region were analyzed looking for changes in the relative proportions of the main groups. In the main pelagic fisheries such as the Kuroshio Current, the Sea of Japan and to some extent the East China Sea, one species - South American pilchards that dominate the catch peaked in the mid to late 1980s and have never recovered. As in other pelagic fisheries world-wide, environmental changes are important in affecting these major changes.

16. Several heavily fished coastal demersal systems (e.g. Yellow Sea, East China Sea, Gulf of Thailand, and to a lesser extent the Sulu-Celebes Sea) showed evidence of “fishing down the food chain”, with catches of larger demersal species peaking early in their history, followed by pelagics and more recently becoming much more dependent on small low value /trash fish.

17. Two LMEs in the region appear to have ever increasing catches - a trend that is at odds with the rest of the region. The catches of fish in the Bay of Bengal have continued to increase since the early 1950s with catches of anchovies, drums or croakers and *Sardinella* reaching all time highs in 2004. This apparent health of these fisheries is not supported by anecdotal evidence from fishers or district fishery officers. In the South China Sea, with the exception of the South American pilchard that followed the environmentally driven trends seen further north, catches of most other groups also continue to increase until fairly recently. However, ecosystem modeling has shown however, that this area has also been subjected to “fishing down the food chain”.

18. Several scientists have alleged that inflated reporting in some countries is still occurring, so that production trends seem to meet production targets set by government. If this is the case and reported statistics are masking the real trends in production, this has serious implications for the sustainable development of fisheries in these sub-regions that should be investigated by APFIC.

19. In the Pacific region, the coastal resources include a wide range of fin-fish and invertebrates that form the basis for the region’s small-scale fisheries, although they are dwarfed in both volume and value by the oceanic tuna fisheries. The sub-region’s coastal fisheries provide most of the local fish supplies and have a crucial role in food security. A recent World Bank study, showed that there was an urgent need to reduce overall fishing effort. Although many of the communities had adopted restrictions to fishing by outsiders, few were effectively regulating their own harvest.

20. Catches of other LMEs in Oceania, where well-developed fishery management regimes in place, are small by comparison with the rest of the region. New Zealand claims that their quota system has allowed rebuilding of some coastal resources and stabilization of others. Results for Australian fisheries are more mixed, noting that time will be needed to rebuild some fisheries severely overexploited by foreign fleets that were previously allowed to fish in Australian EEZ through access arrangements.

21. Most inland fisheries are small-scale activities. The main exceptions are the industrialized fisheries in the lower Mekong Basin and the “fishing lots” in the Tonle Sap in Cambodia as well as the fishing “inns” of Myanmar. The lack of accurate reporting of these small-scale fisheries makes it difficult to describe their status but it is generally felt that they are under considerable pressure from both loss and degradation of habitat and from over-fishing.

22. Rivers and floodplains have been heavily impacted with the construction of dams, roads, channels, and other irrigation systems and with the encroachment of shore areas by farmers for agricultural purposes. The draining of water to reduce the impacts of flooding has also had widespread effects on inland fisheries in the region although the real impacts are poorly documented. Fishers regularly complain that catches are declining, especially of the large species, but it is uncertain to what extent. Large, slow growing species, such as the giant catfish are becoming increasingly rare.

Aquaculture production trends by species group

23. Freshwater aquaculture, especially omnivorous and herbivorous fish provides important food fish for developing Members in the region. Aquaculture methods have become diversified and intensified and now include fertilized polyculture and systems using supplemental or even complete feeds. Farmers still seek out new species that give them a market advantage and at this stage of “industrialization” there is no trend to rationalize the number of species being cultured. Carps and barbs (cyprinids) continue to be the most popular species group cultured. Common carp is the most commonly cultured species in the region, and is grown in 18 States. Silver carp has maintained the highest production for decades but grass carp is closing the gap. Markets of these species are largely domestic and there is little opportunity for export.

24. Cultured shrimp production has exceeded one million tonnes (34 percent of total shrimp landings). Introduction of the white shrimp (*Penaeus vannamei*) from Latin America has led to a rapid increase in the production of this species. China’s production alone is greater than that of all Latin American States. However, with so many Asian States producing a relatively small white shrimp, prices have dropped dramatically leading to disagreements of possible “dumping” of white shrimp onto world markets. Freshwater prawn and crab production is also increasing.

25. Production of temperate seaweeds such as Japanese kelp, laver (Nori), green laver and Wakame production has leveled off in many States, the exception being Japanese kelp in China. The global demand for tropical seaweeds such as *Euchema*, *Gracilaria spp.* and red seaweeds that are used as sources of commercially important biopolymers (carrageenan, agar) is continuing to rise.

Selected issue facing fisheries and aquaculture in Asia and the Pacific

26. The 2006 edition of the “Status and potential of fisheries and aquaculture in Asia and the Pacific” has highlighted two emerging issues:

- Illegal, unreported and unregulated (IUU) fishing; and
- Food safety and trade

27. IUU fish is probably the biggest threat to the sustainable development of fisheries (and aquaculture) in the Asia-Pacific region. Because a large part of the region is under the jurisdiction of country’s exclusive economic zones (EEZs), a large part of the IUU problems arise from either (i) nationals fishing in contempt of national and district laws and regulations or (ii) from encroachment of foreign vessels and fishers in another country’s EEZ. Deterring, and hopefully, eliminating IUU, therefore, is a responsibility of all APFIC Members.

28. In a recent review of the capacity of APFIC Members to manage IUU, it was noted that many Members did not even have the necessary legislation to deal with the problem. Many Members also have insufficient monitoring, control and surveillance (MCS) capacity to deal with domestic infringements, let alone foreign encroachments. Informal access agreements, often between fishing companies and other business associates, aggravate the problem. To combat IUU, APFIC Members will need to:

- Mainstream fisheries co-management so that local communities can become more self-reliant in preventing IUU fishing in their local areas;
- Adopt broader bi-lateral and sub-regional cooperation among countries in deterring IUU fishing in the region, starting with the development of National plans of Action in support of the FAO International plan of Action to deter and eliminate IUU fishing.

29. Meeting food safety and quality standards in products from fisheries and aquaculture is becoming increasingly important for APFIC Member countries. Both exporting and importing countries require an increased focus on food safety. This is reflected in increasingly stringent measures for ensuring safety of food ensuring hygiene and freedom from residues and contaminants. Whilst the initial focus of improving the quality and safety of seafood products was initially focused on the processing and exporting part of the sector, there is now increasing attention being paid to the methods of production (pre-harvest), both in capture fisheries and aquaculture.

30. Food safety and quality control is having an increasing impact on APFIC Members access to lucrative international and regional markets and trade implications related to food safety and the quality of the seafood is expected to be increasing in the years to come. To improve the preparedness for food safety and trade issues, APFIC Members will need to:

- Support and develop capacity building, training and awareness raising in food safety and trade related aspects for APFIC member countries.
- APFIC Members should actively engage in development of marked standards and labels/certification related to international fish trade.

The outlook for fisheries and aquaculture in Asia and the Pacific

31. The outlook for fisheries and aquaculture in the region needs to be considered in the context of broader global and regional trends. Following earlier studies by the International Food Policy Research Institute and the WorldFish Centre, APFIC is collaborating with the World Fish Centre in examining the supply and demand of fish and fish products in the region, and through modeling, to investigate a number of scenarios of possible future trends.

32. Globally, the main source of fish production has shifted from developed to developing States and their share of aquaculture has increased substantially. Seafood demand from developing States is expanding rapidly and major shifts in seafood and aquaculture production, trade, and consumption worldwide are expected to continue over the next 10-20 years with south-south trade in seafood increasing relative to north-south trade. Developing States are expected to remain net exporters overall, but the percentage of their production exported is expected to decrease due to rising domestic demand.

33. A large part of the production from developing States in the region comes from small-scale operators who are totally dependent on the fishery resources for their livelihoods. A large part of the market is also for low value/trash fish for animal feed that is dominated by larger industrial vessels. There is general agreement that coastal resources are over-exploited.

34. For Asia-Pacific to harness the potential that fishing has to offer, both in terms of an engine for poverty reduction and economic growth as well as a social safety net in times of hardship, a reduction in fishing capacity in the region is obviously needed. In the first instance, reducing the capacity and effort of the industrial fleet would have several benefits in terms of profitability of the sector as a whole and would have large social benefits in terms of the small-scale fisheries and sustainable livelihoods.

35. Reduction in the capacity and fishing effort in industrial fisheries by itself, however, will not be sufficient. Improved management of small-scale fisheries is also required. This will require better implementation of co-management, especially by governments so that some of the responsibilities they have had in the past for fisheries management are decentralized to local communities. This involves a much more participatory role in planning, policy development and implementation of more responsible fishing.

36. Co-management will require considerable capacity building at all levels so that all involved can communicate common goals and understand each other's roles and responsibilities. This needs to be done through "on-the-job" training involving tackling every day issues and finding solutions that are practical and feasible. APFIC, within its limited financial resources, is promoting capacity building, especially of decentralized fishery staff in several Member countries.

37. Many Member governments have seen the expansion of aquaculture as a way to meet the increasing demands for fish and provide alternative livelihoods to fishers to reduce the pressure on coastal resources. This policy, however, will have to recognize and address several constraints, if it is to reach expectations. This includes limitation of the areas needed for production increase as well as greater intensity of production. Obtaining the land and water may be possible if the value of fishery products increases so that aquaculture can challenge other production systems for the use of the feeds, land and water required to effect this production. Alternatively, increased efficiency in the use of water and intensified

production will reduce land requirements. The current intensity of production in many States of Asia is such that there is considerable scope for increasing production per unit area. However, the increased feed usage and probable increased water requirement will be a constraint. The reliance on fish meal/oil and the increased pressure this is putting on capture fisheries will need to be addressed.

38. Another commonly adopted policy is to encourage expansion into offshore waters, especially in pursuit of the lucrative tuna fishery. However, the tuna commissions of the Indian Ocean and the western and central Pacific, who have the mandate to manage the tuna stocks in these oceans have warned that apart from skipjack tuna (a species that fetches relatively low prices on the world market), all other species are either fully- or over-exploited. Total catch limits are being imposed and competition among fishing nations will intensify. Both Commissions have also warn, that at the sub-regional scale, the tuna fisheries of both the Pacific and Indian Ocean already face very high levels of overcapacity. Any increase in vessels from any country will add to this overcapacity and, in cases where cases where government subsidies are encouraging this expansion, face increasing global scrutiny.

39. In terms of the very large picture, if fish prices rise as predicted, there will be a tendency for poorer parts of national populations to shift towards cheaper form of animal protein such as chicken and pork. Given globalization and rapid economic growth in many countries of the APFIC region, the extent to which fish in the Asia and Pacific will remain a common (and even central) part of the diet of most people or increasingly become a luxury food item is an important policy concern that will require a monitoring over future years.

SUGGESTED ACTION BY THE COMMISSION

40. The Commission is invited to review the production trends, status of fisheries and aquaculture in the APFIC region as well as select issues implicating sustainable fisheries and aquaculture development in the Asia-Pacific region. It is also invited to take note of the possible implications for the future supply and demand of fish which may affect the conservation and rational utilization of fishery resources and aquaculture of the region in the future. It may also wish to comment on other regional issues which need further attention and appropriate action.

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ASIA-PACIFIC FISHERY COMMISSION

Twenty-ninth Session

Kuala Lumpur, Malaysia, 21-23 August 2006

SELECTED ISSUES OF REGIONAL IMPORTANCE

– LOW VALUE/TRASH FISH

The APFIC Regional Consultative Forum agreed that:

“Low value/trash fish” refers to fish that are generally of relatively low economic value and typically small sized. They can be used for either human consumption or as animal feeds (both fish and livestock). They may be used directly in both aquaculture to feed other fish or processed into fish meal/oil for incorporation into formulated diets. The same is true for human food, where the fish may be consumed directly, or further processed often using traditional methods of processing small fish.

The main recommendation of the APFIC Regional Consultative Forum was that:

To address the issues associated with the increasing trend in the production of low value/trash fish taken from the APFIC region the APFIC Regional Consultative Forum recommended that Members should take action on three fronts, covering both fishery and aquaculture initiatives:

Improved Management of Fisheries.

APFIC Members should:

- Reduce trawling and push net effort and fishing capacity (and clearly monitor the effects of capacity reduction) ;
- Introduce improved selectivity of fishing gears/fishing practices, in particular gear to increase the size of fish captured;
- Introduce mechanisms for rights based fisheries and co-management (to facilitate reduction in the ‘race for fish’)
- Establish mechanisms to identify and protect juvenile nursery areas (refugia/closed areas, seasonal closure);
- Provide alternative income generating activities; and
- Link fisheries and aquaculture policies to other sectoral policies (particularly agriculture) and to more general development policies.

Improved utilization of low value/trash fish for human food:

To improve the utilization of fish and fisheries products, the region should:

- Improve post harvest fish handling for human consumption and enhance food safety measures;
- Develop new fish products through processing, and
- Promote the benefits of fish for improving food security and reducing poverty in the region.

Improve feeds for aquaculture.

Noting that aquaculture was growing at a rapid rate in the region and that feed for this growing industry continued, in large part, to be sourced (either directly or indirectly) from wild fish stocks, the region should:

- Fast-track the change over from direct feeding to pellet feeding (noting that shrimp aquaculture is already based on pellet feed);
- Reduce fish meal content of aquaculture feeds by substitution of suitable ingredients in pellets;
- Invest in feed research for inland/marine species;

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SELECTED ISSUES OF REGIONAL IMPORTANCE

– COMANAGEMENT, GOVERNANCE AND INSTITUTIONS

The APFIC Regional Consultative Forum, noting that fisheries co-management includes both fisheries (marine and freshwater) and aquaculture activities, recommended that:

Fisheries co-management be mainstreamed in national systems of management in the countries of the Asia-Pacific region, building on previous activities.

In this context, co-management can be defined as:

Fisheries co-management is a partnership approach where government and the fishery resource users share the responsibility and authority for the management of a fishery or fisheries in an area, based on collaboration between themselves and with other stakeholders.

This over-arching recommendation should be achieved by implementing the following actions:

For APFIC members to:

- Invest adequate resources into developing co-management and allocate appropriate budgets for fisheries co-management practices at all levels, (noting that it often takes significant time to build up the trust and capacity for successful co-management.);
- Ensure that co-management addresses key national policy objectives such as reducing overexploitation of fish stocks and over-capacity in both marine and freshwater fisheries, poverty reduction, possibly through rights-based approaches;
- Review, develop and amend national fishery policy and legislation (where necessary) to support fisheries and aquaculture co-management, in particular supporting the right of stakeholders to be involved in management.(inclusion/reference to the use of rights based fisheries as a tool for aiding implementation of co-management);

- Define and communicate the respective roles and responsibilities of all stakeholders (including government and regional /intergovernmental organizations);
- At the operational level, establish agreed objectives for fisheries co-management (through dialogue and negotiation with fishery communities and civil society organizations/NGOs);
- Assist in the empowerment of communities, and ensure equitable distribution of the benefits of co-management, with special emphasis on the livelihoods of small-scale users;
- Facilitate human and institutional capacity building at all appropriate levels across communities and scales, in particular, ensure that government staff at all levels are adequately skilled and experienced to facilitate the implementation of fisheries co-management (focusing on participation, communication and building partnerships);
- Facilitate the creation of effective institutional arrangements and linkages among the major stakeholders at all levels, building on existing arrangements, (including better cross-sectoral integration and communication where appropriate for fisheries co-management);

For all parties

- Share information and experiences on co-management between members including information on costs and benefits, via lessons learnt; and
- Encourage research agencies to undertake applied research that meets high priority needs of major stakeholders in particular utilize traditional knowledge, management practices and experience (as a pre-requisite, co-management stakeholders may need to develop mechanisms to prioritize and communicate research needs).

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POLICY CHALLENGES

National fisheries and aquaculture sector policy

The APFIC Regional Consultative Forum noted that in most cases countries in have 'good policy content' and elements of 'best practice' contained within their fisheries and aquaculture policies.

All policies in Asian APFIC countries refer to the need to tackle illegal fishing and propose the use of reserved or (Marine) protected areas or similar area-based restrictions. Almost all policies in the region state food security, poverty alleviation, community/co-management, decentralisation, capacity reduction, improvements in administrative efficiency, and cross-sectoral collaboration as policy objectives.

However, the Forum also noted a number of concerns with respect to policy in the region.

Policy gaps

- There is inconsistencies between the national policies of countries (particularly neighbouring countries), which would benefit from a degree of harmonization;
- There maybe conflicting national policies between fishery and aquaculture sub-sectors and with other activities (e.g. trade, conservation and environment);
- There is still a need in some countries to develop specific fishery policies;
- There is a lack of reference in many national policies to international and bi-lateral arrangements;
- Most policies in the region refer to the expansion of offshore fisheries, even though the potential of offshore resources and the economic viability is in many cases, not well known;
- The need to increase introduce rights-based fisheries management is not widely included in policy in the region;

- While most policies refer to both poverty alleviation and increases in exports as key objectives, few are specific about the need to specifically address distributional aspects and impacts of trade;
- Most policies refer to the need to increase value-added in the context of pre- and post-harvest activities, but there is less mention of the need/ability to increase value-added throughout the supply chain (especially at the harvesting level) and in related activities;
- Micro-finance as a form of credit is increasingly recognized as an important tool in bringing about poverty alleviation, but is not widely referred to in fishery policies in the region;
- Generally in policy documents there are few if any references to gender-related issues, (noting that marginalized groups may be generically covered under references to ‘poverty alleviation’); and
- Where fisheries management is in place in the region, the costs are increasing. However generally within the region, there is relatively limited investment in fisheries management, and policies in the region do not always specifically indicate the new sources of revenue that will be required.

Implementation issues

- Major challenges exist in many countries with respect to ‘operationalising’ fisheries policy, and in the detailed planning required for implementation of policy i.e. specification of activities, allocation of responsibilities, use of indicators, provision of appropriate budgets, etc;
- Targets for increasing capture fisheries production may be based more on economic planning goals rather than sustainable use of resources and a realistic assessment about resource potential;
- Targets for aquaculture production may not reflect future challenges and potential future resource constraints (as well as opportunities for increasing aquaculture production); and
- Restricted or reserved areas (including MPA) may not always be effective or appropriate in certain cases, often lying outside the mandate of the national Fisheries Department.

Poverty Reduction Strategy Papers (PRSPs) and National Development Plans (NDPs)

The Forum noted that, in general, the fisheries sector is relatively well-covered in national PRSPs and NDPs, especially in countries that have a (i) high fisheries exports as a proportion of agricultural exports, (ii) high contribution to domestic protein requirements (iii) high employment in the sector and (iv) a high rural poverty.

However, the Forum noted that:

- Countries in the region could be doing more to link with and influence the policies and activities of international agencies e.g. UNDP, UNESCAP Sub-Committee on Poverty Reduction Practices;
- The forum encouraged countries to fulfill their targets indicated in PRSPs and NDPs (noting that policy is a dynamic process and to ensure the inclusion of fisheries in new PRSP and other future policy documents);

- The forum considered that support to the fishery sector would be better directed in the form of support to improved management of fisheries (including management of fishing capacity) and aquaculture; and
- It was noted with concern that specific support to the fishery sector has been de-prioritized by the Asian Development Bank.

Regional environmental management of Large Marine Ecosystems (LMEs)

Ensuring the effective inclusion of fisheries issues into broader frameworks for marine management is an emerging policy challenge for the region. Efforts to meet this challenge are constrained by:

- limited practical experience in the implementation of such approaches;
- low-level awareness of the extent of the partnerships required to merge fisheries; and
- environmental management, and environment initiatives not involving mechanisms that foster the effective integration of fisheries considerations into multiple-use management frameworks.

The APFIC Regional Consultative Forum noted that:

Regional experience suggests that overcoming these challenges will require:

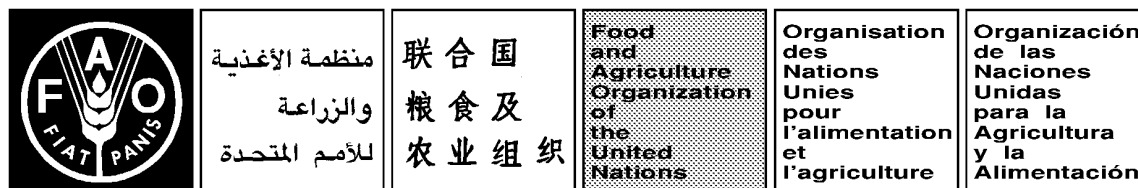
- improving the understanding amongst fishing communities, managers, and policy makers of ecosystem and fishery linkages, as a basis for integrated fisheries and habitat/ecosystem management; and
- building the capacity of both fisheries and environment ministries and departments to ensure that issues facing the fisheries sector are integrated into overall marine management frameworks.

Conduits for integrating fisheries into overall management frameworks should:

- Focus on linkages fish life-cycle and critical habitat;
- Be easy for fishing communities, local government officials, and fisheries managers to relate to; and
- Provide a suitable platform for the fisheries sector in best representing fisheries issues in fora relating to multiple-use marine management.

Experience indicates that the LME programmes engage in specific useful aspects of fisheries management, however they do not deal with some of the most important aspects (such as capacity management). It is suggested that LME programmes should make an effort to incorporate important fisheries management actions into their programmes.

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EMERGING ISSUES (INCLUDING ACTIONS FROM COFI)

Aquaculture and fishery product standards and trade

As trade in fish products increase, food quality and safety issues, along with related issues of labeling, traceability and certification, are becoming increasingly important for countries in the APFIC region. The globalization and expansion of international food trade has led to the development of fish safety and quality standards that has significant impact on international fish trade.

Technological developments in (i) pre-harvest management, fish handling, preservation and distribution; (ii) consumers' increasing awareness and demand for safe fish of high quality; and (iii) global concerns over the use of safety and quality requirements as barriers to trade, have all contributed to these developments and culminated in the adoption of HACCP-based systems and scientifically-based risk-assessment methods.

The Regional Consultative Forum Meeting noted that:

- A food chain approach is being adopted that requires an enabling policy and regulatory environment at national and international levels with clearly defined rules, responsibilities and practices, the establishment of appropriate food control systems and programmes at national and local levels, and the provision of appropriate training and capacity building;
- There is an increasing use of voluntary Codes of Conduct, Better Management Principles and a variety of certification mechanisms (e.g. MSC) in both capture fisheries and aquaculture. These are increasingly becoming promoted in major markets for fish from the region and there will be increasing pressure for their adoption/compliance within producing countries;
- There are also increasing mandatory codes and mechanisms being introduced with which producing countries will be required to comply;
- There are obvious constraints for developing countries in complying with the standards promoted by these schemes, and these will need to be addressed in the future, in order to capitalize on the benefits they offer;

- There is some concern that small-scale fishers and unorganized farmers are at a disadvantage in trade if too strict measures are put in place on food standards issues. There is a need to sustain public support to small-scale farmers and fishers to enable them to address the issues of and what impact potential standards will have on these farmers; and
- There should be a harmonized approach to HACCP aquaculture (standards) work across countries in the Asian region.

Illegal, unreported and unregulated fishing

The Forum noted that the region must address the issue of illegal, unreported and unregulated (IUU) fishing which is considered to be a significant cost to the region. Noting that much of the region's sea (especially in the South East and East Asian region) area lies within national Exclusive Economic Zones (EEZs) and the extent of international waters is limited, the responsibility for controlling IUU fishing rests largely with national Governments of the region.

The Regional Consultative Forum Meeting noted that:

- Many countries do not have the legislative or material capacity to adequately address IUU fishing;
- Excess capacity is one of the main drivers of IUU fishing and there is an urgent need for countries to begin to manage the issue of over-capacity of their national fishing fleets, to review national legislation with regards IUU fishing and to support international initiatives on the management of shared stocks and IUU fishing;
- With the exception of the Tuna management Commissions (Indian Ocean Tuna Commission & Central and Western Pacific Fisheries Commission), there is no mechanism in place for regional co-ordination of management measures, including management of foreign vessel access to EEZs and international waters;
- Many IUU issues could be resolved via bilateral agreements and countries are increasingly engaging in bi-lateral agreements, however, there is little coordination at the regional (sub-regional) level;
- There is no mechanism for information exchange on IUU between countries (especially bi-lateral access agreements); and
- There is a need for a more coordinated regional and sub-regional approach to IUU fishing.

July 2006



ASIA-PACIFIC FISHERY COMMISSION

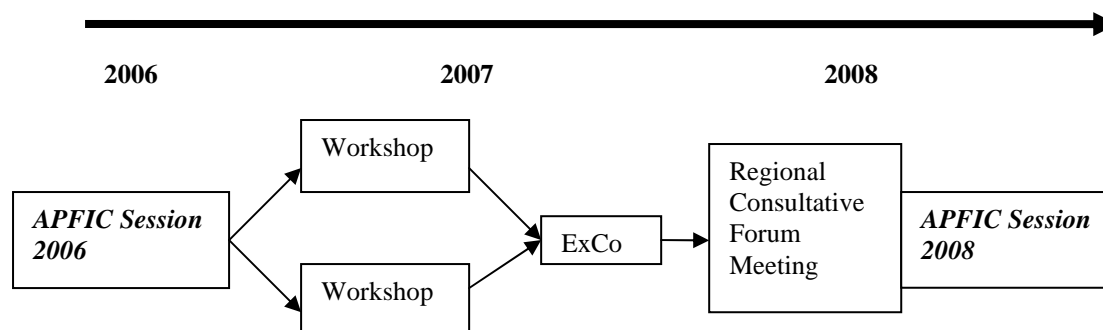
Twenty-ninth Session

Kuala Lumpur, Malaysia, 21-23 August 2006

APFIC's WORK PLAN 2006/08

PROPOSED WORK SCHEDULE

1. The Twenty-eighth Session of APFIC adopted a 6-year Work Plan. This was based on a repeating biennium plan as shown below for 2006/08.



2. This document proposes a tentative Workplan to be carried out by the Secretariat, commencing 2006 and leading up to the Second Regional Consultative Forum Meeting in 2008 (Annex i). The work plan takes note of the Biennial Session of the Committee for Fisheries (COFI), the concurrent Regional Fishery Bodies (FRB) meetings, APFIC Executive Committee and biennium Sessions.

3. The steps to be taken in the work plan, therefore are as follows:

- (i) Following on from the Twenty-ninth APFIC session, the Secretariat reports the outcomes to COFI and the RFB meeting and with the support of appropriate Working Groups prepares for the Second Regional Consultative Forum Meeting (RCFM) in August 2008.

- (ii) The APFIC Secretariat contributes to the collection and dissemination of quality data and statistics, particularly those relating to small-scale fisheries and rural aquaculture. The APFIC website will be used to provide a platform for the dissemination and exchange of information.
- (iii) The Secretariat organizes and implements two regional workshops on the Commission top two priority emerging issues.
- (iv) The Secretary informs all Members, all regional and sub-regional organizations and arrangements with relevance to fisheries/aquaculture in the APFIC region of the proposed program for the RCFM and invites their participation and suggestions for the changes to the program.
- (v) The Seventy First Session of the Executive committee of APFIC meets in August 2007 to review (i) preparations for the RCFM (ii) workshop implementation and (ii) work of any ad hoc Working Groups/consultants. The Executive Committee also develops the agenda for the Thirtieth Session of the Commission to be held in August 2008.
- (vi) The Second RCFM is held in August 2008, immediately preceding the 30th Session of APFIC
- (vii) Immediately following the RCFM the Commission will hold its biennial Session that will consider the outcome of the workshops and the RCFM and will also consider any additional matters raised by Members and may wish to develop recommendations for COFI and the RCFM.

OTHER PRIORITY ACTIVITIES

APFIC website

3. The APFIC Secretariat will continue to develop and update its website. The website has been developed to inform Members and any other interested parties about fisheries and aquaculture in Asia-Pacific. It also provides links to other sub-regional organizations and projects and relevant statistics. It will continue to promote the importance of fisheries and aquaculture in Asia-Pacific and provide a sound platform for informed policy development and decision making.

APFIC publications

4. Publications will remain an important media for information dissemination and exchange. The Biennium "Status and trends of fisheries and aquaculture in the Asia and the Pacific" will be updated to include 2006 data in 2008 (FAO statistics lag by 2 years). It will also publish reviews and up-to-date information on the APFIC selected emerging issues as well as other high profile issues in the region.

APFIC Regional Consultative Workshops.

5. Two workshops will be organized by the Secretariat to cover the emerging issues identified by APFIC.

Advice to Members

5. APFIC Secretariat will continue to provide direct advice to Members, through workshops, meetings and projects (including backstopping of country and regional projects).

Collaboration with internationals/regional bodies

6. To promote APFIC activities and ensure better coordination with other RFBs and arrangements, APFIC Secretariat will continue to collaborate with other internationals/regional bodies, as appropriate.

APFIC review

7. As agreed in Twenty-eight Session of APFIC, a comprehensive review of APFIC and its new role as a Regional Consultative Forum will be conducted and reported to the Thirtieth Session of APFIC in 2008.

SUGGESTED ACTION BY THE COMMISSION

The Commission requested to consider the tentative Work Plan and priority activities for the APFIC biennium 2006/08 and modify as appropriate. It is then asked to endorse the Plan.

ANNEX I

Outline of the tentative APFIC Work Plan for 2006/08 and 2008/10 (based on the agreement of the APFIC twenty-eight Session).

2006-08

- February/ March 2007 – Rome, Italy. COFI Session (and RFB meeting)
- May 2007 – First Regional Consultative workshop
- August 2007 – 71st APFIC Executive Committee Session
- September 2007 – Second Consultative Regional Workshop
- August 2008 – Second Regional Consultative Forum Meeting and 30th Session of APFIC.

2008-10

(Assuming endorsement of 30th Session of APFIC – based on the comprehensive review).

- February/ March 2009 – Rome, Italy. COFI Session (and RFB meeting)
- May 2009 – First Regional Consultative workshop
- August 2009 – 72nd APFIC Executive Committee Session
- September 2009 – Second Consultative Regional Workshop
- August 2010 – Second Regional Consultative Forum Meeting and 31st Session of APFIC.

August 2006



منظمة الأغذية
والزراعة
للأمم المتحدة

联合国
粮食及
农业组织

Food
and
Agriculture
Organization
of
the
United
Nations

Organisation
des
Nations
Unies
pour
l'alimentation
et
l'agriculture

Organización
de las
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Unidas
para la
Agricultura
y la
Alimentación

ASIA-PACIFIC FISHERY COMMISSION

Twenty-ninth Session

Kuala Lumpur, 21-23 August 2006

PROVISIONAL LIST OF DOCUMENTS

A. Working documents:

APFIC/06/1	Provisional Agenda and Timetable
APFIC/06/2	Inter-sessional activities of APFIC (includes 3 addendums)
APFIC/06/3	Overview - Status and potential of fisheries and aquaculture in Asia and the Pacific
APFIC/06/4	Selected issues of regional importance – low value/trash fish
APFIC/06/04 Add. 1	Selected issues of regional importance – low value/trash fish
APFIC/06/5	Selected issues of regional importance – co-management, governance and institutions
APFIC/06/5 Add. 1	Selected issues of regional importance – co-management, governance and institutions
APFIC/06/6	Policy challenges
APFIC/06/6 Add. 1	Policy challenges
APFIC/06/7	Emerging issues (including actions from COFI)
APFIC/06/7 Add. 1	Emerging issues (including actions from COFI)
APFIC/06/8	APFIC's Work Plan 2006/08

B. Information Documents:

APFIC/06/Inf. 1	Provisional list of documents
APFIC/06/Inf. 2*	Provisional list of participants and observers
APFIC/06/Inf. 3	Report of the Twenty-eighth Session of APFIC, Chiang Mai, Thailand, 3-5 August 2004
APFIC/06/Inf. 4	Report of the Seventieth Session of the APFIC Executive Committee, Kuala Lumpur, Malaysia, 23-25 August, 2005
APFIC/06/Inf. 5	Report of the Regional Consultative Workshop on Low value and "trash fish" in the Asia-Pacific region, Hanoi, Viet Nam, 7-9 June 2005

- APFIC/06/Inf. 6 Asian fisheries today: The production and use of low value/trash fish from Marine Fisheries in the Asian Pacific region. RAP publication 2005/16
- APFIC/06/Inf. 7 Report of the Regional Consultative Workshop on Mainstreaming fisheries Co-management, Siem Reap, Cambodia, 9-12 August 2005
- APFIC/06/Inf. 8 Mainstreaming fisheries co-management in the Asia-Pacific. RAP publication 2005/24
- APFIC/06/Inf. 9* Draft document - Status and potential of fisheries and aquaculture in in Asia and the Pacific

* to be distributed at the Session