

A collage of various images related to marine fisheries, including a woman holding a fish, a boat, a fisherman, and a large fishing vessel. The collage is set against a background of a globe with a blue arc on the left side.

The State of Marine Fisheries- 2004

An overview

A collage of images related to agriculture and rural life. It includes a woman in a floral dress and straw hat holding a white fish, a group of people near a body of water, a sunset over a field, and people working in a field. The collage is set against a background of a blue globe with a grid.

Outline

- ✚ 1. Selected indicators
- ✚ 2. Selected issues
- ✚ 3. Societal response
- ✚ 4. Outlook

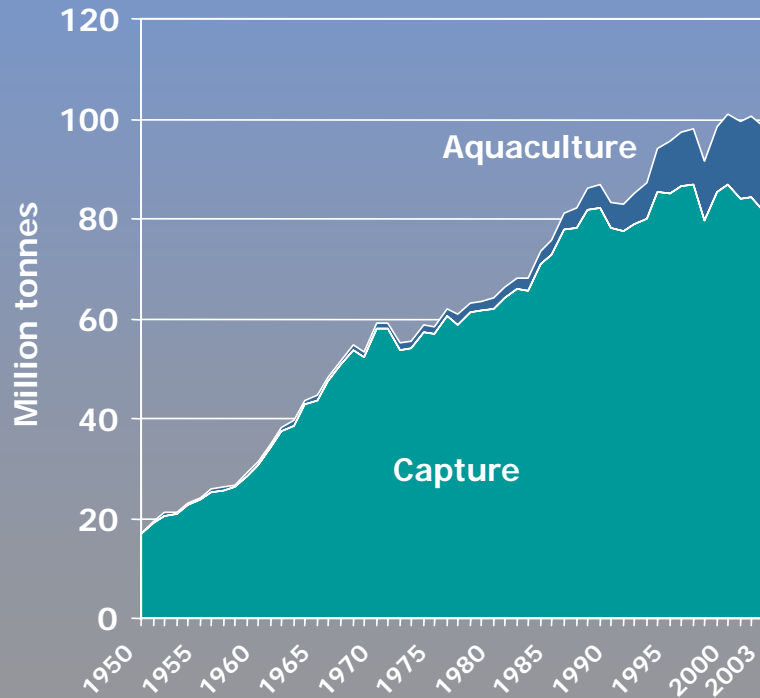
A collage of images related to agriculture and fishing. It includes a woman in a floral dress and a straw hat holding a large white fish, a group of people near a body of water, and a person working in a field. The collage is set against a blue background with a grid pattern.

1. Selected indicators

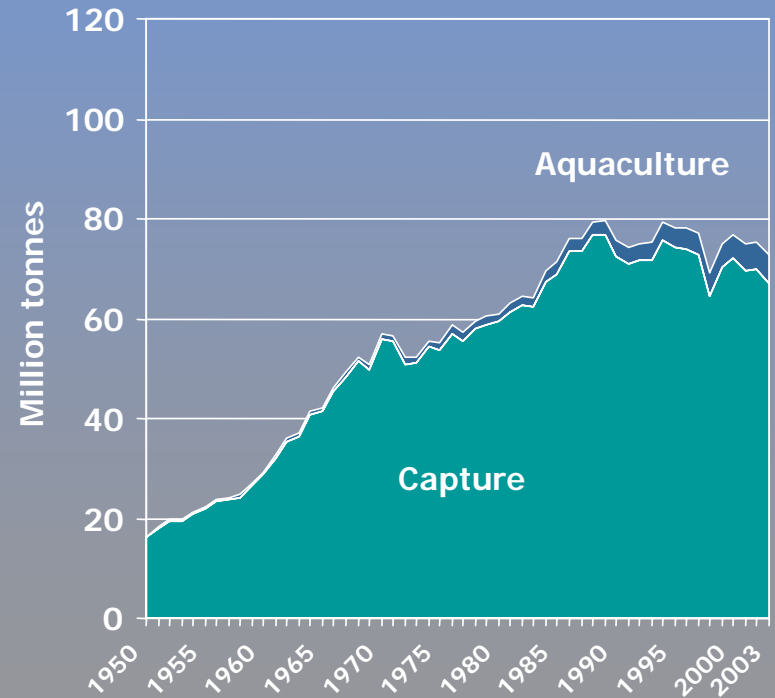
- ✦ Reported landings
- ✦ Food
- ✦ Employment
- ✦ State of stocks
- ✦ Trade
- ✦ Fleet size

Reported marine production

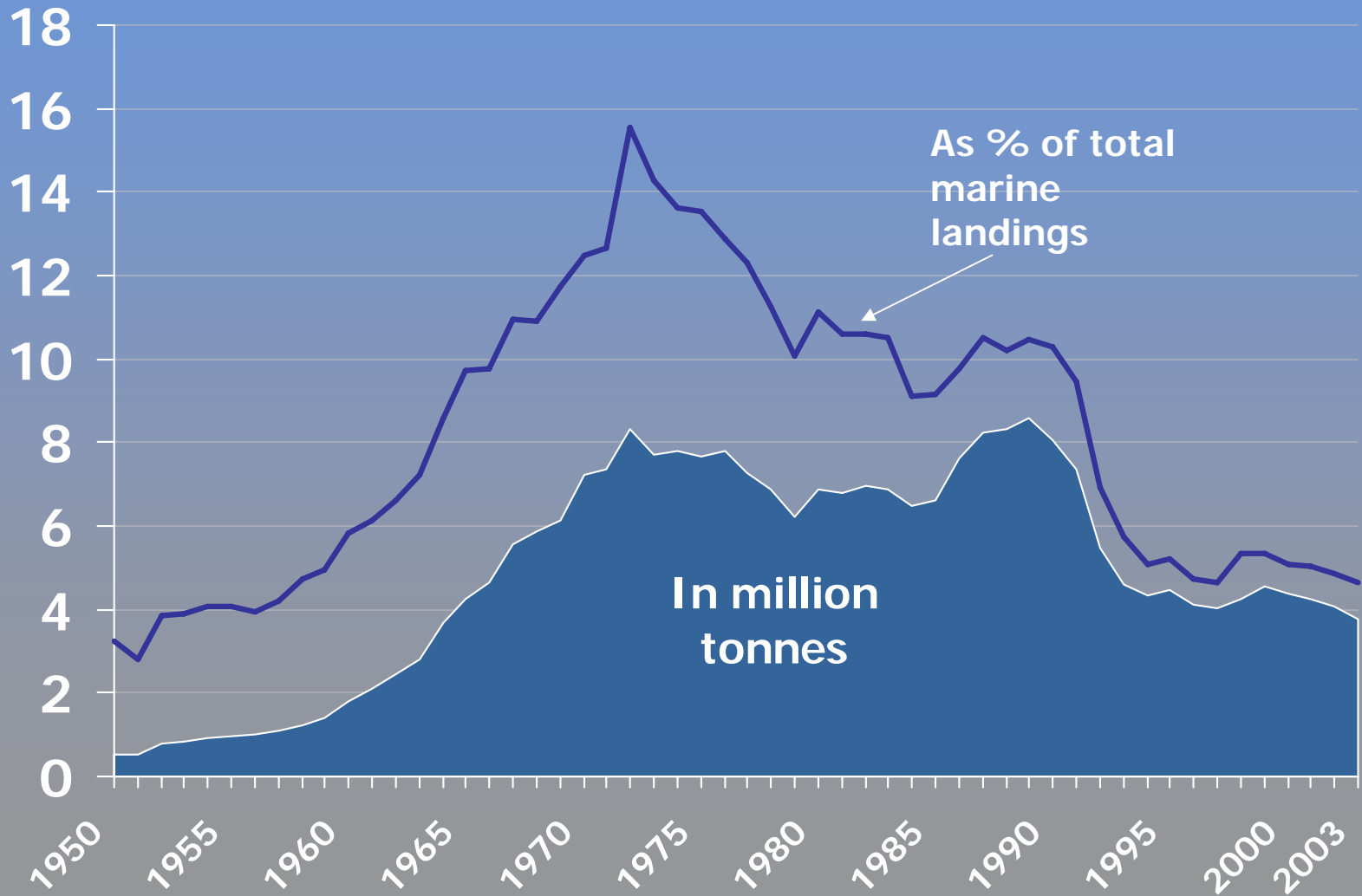
World



World excluding China

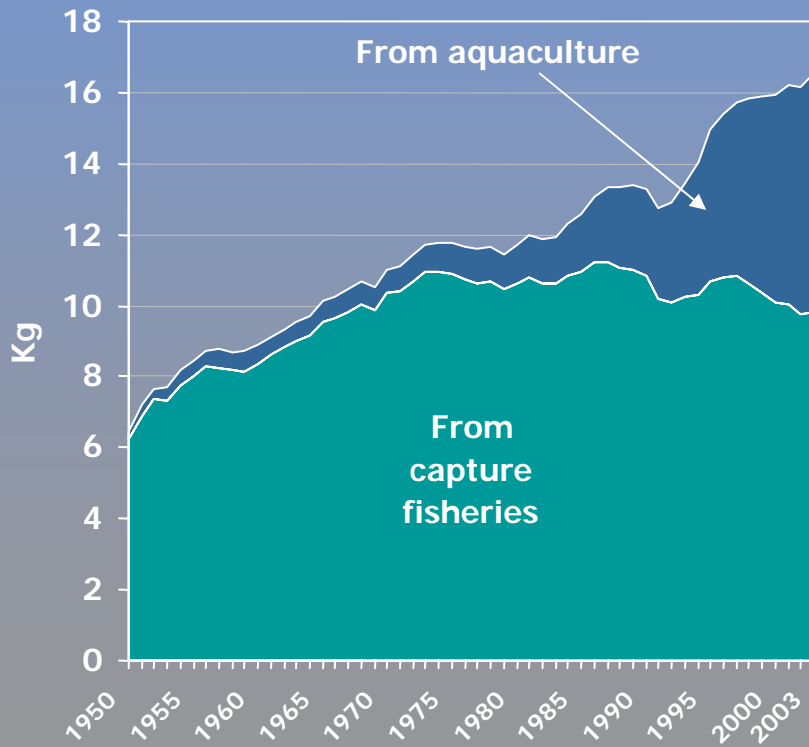


Non-coastal marine landings

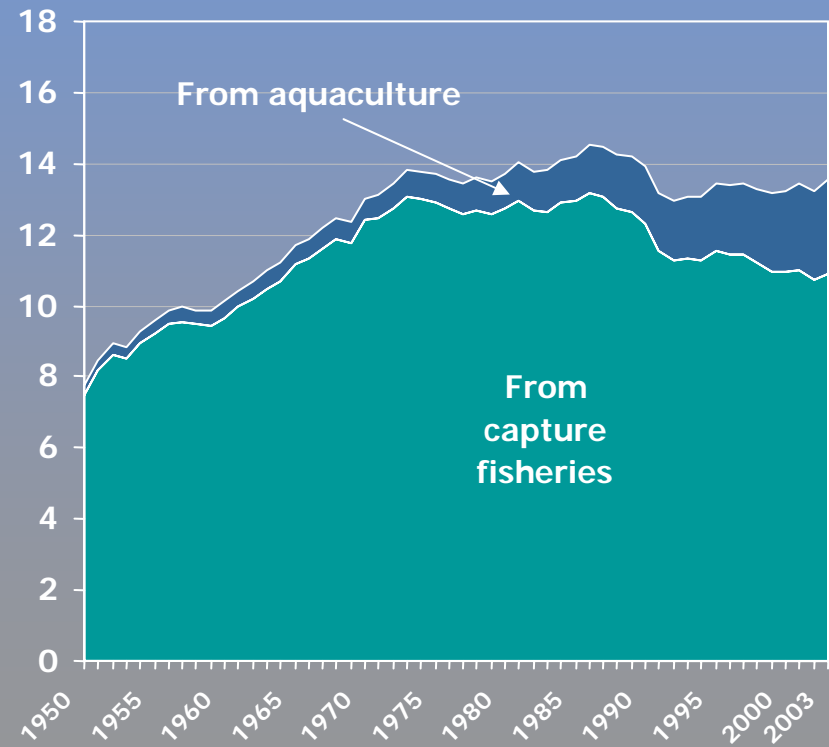


Contribution to food

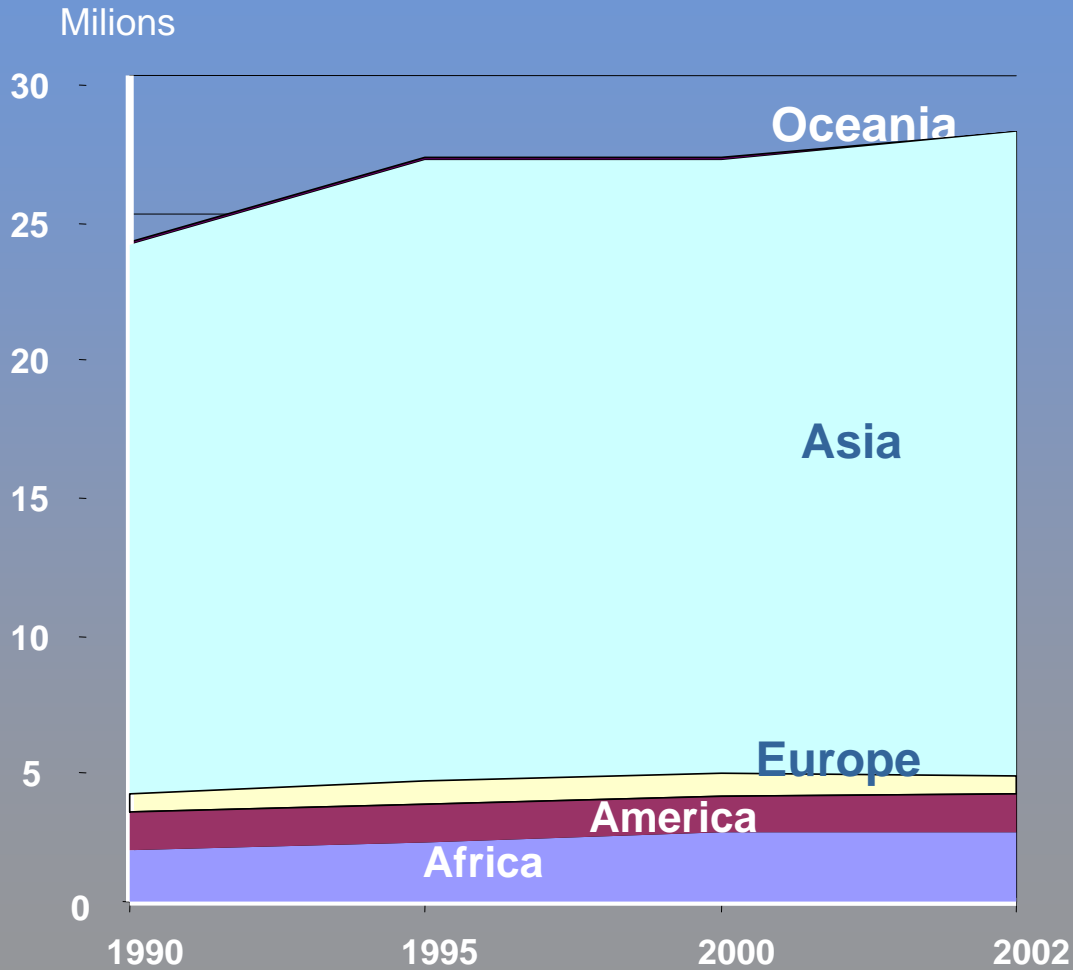
Per capita supply with China



Per capita supply w/o China

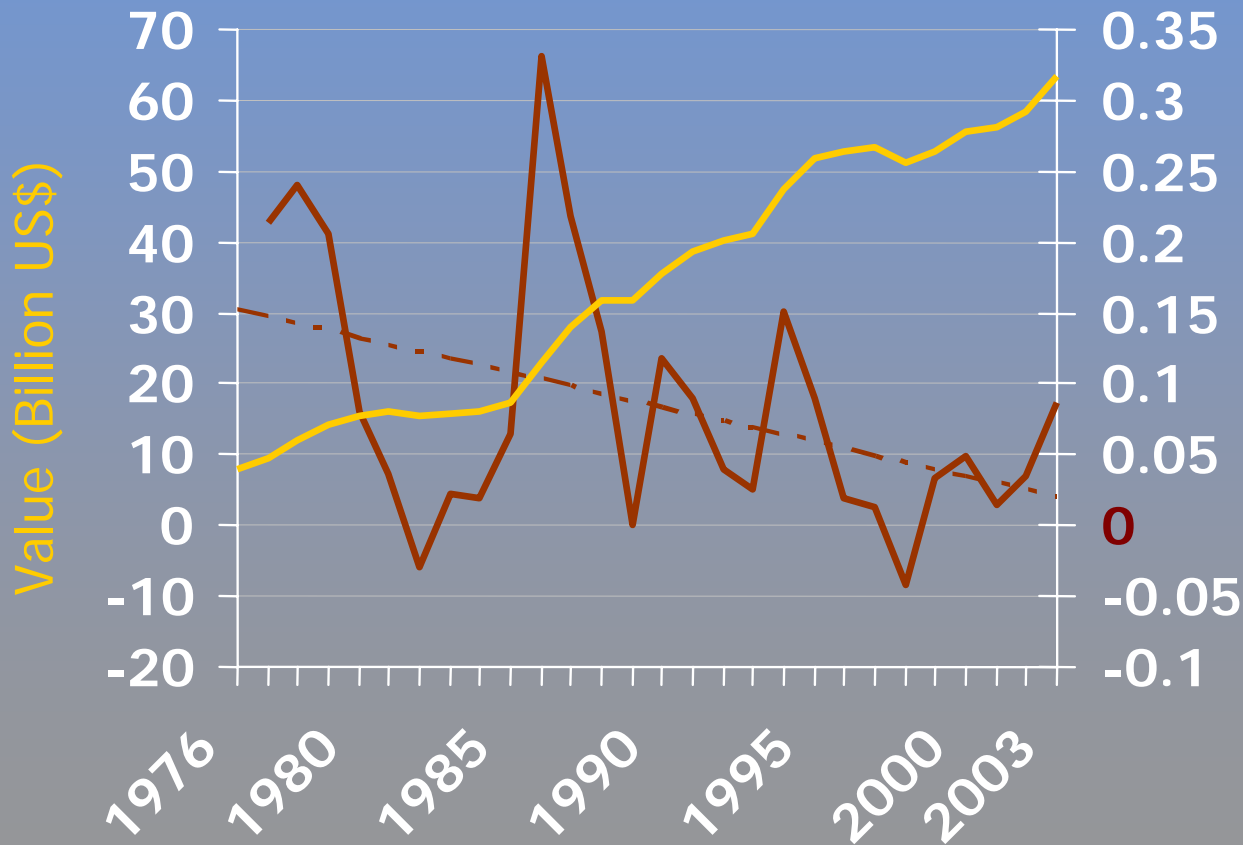


Fishers



More than 80% of capture fisheries employment is in Asia

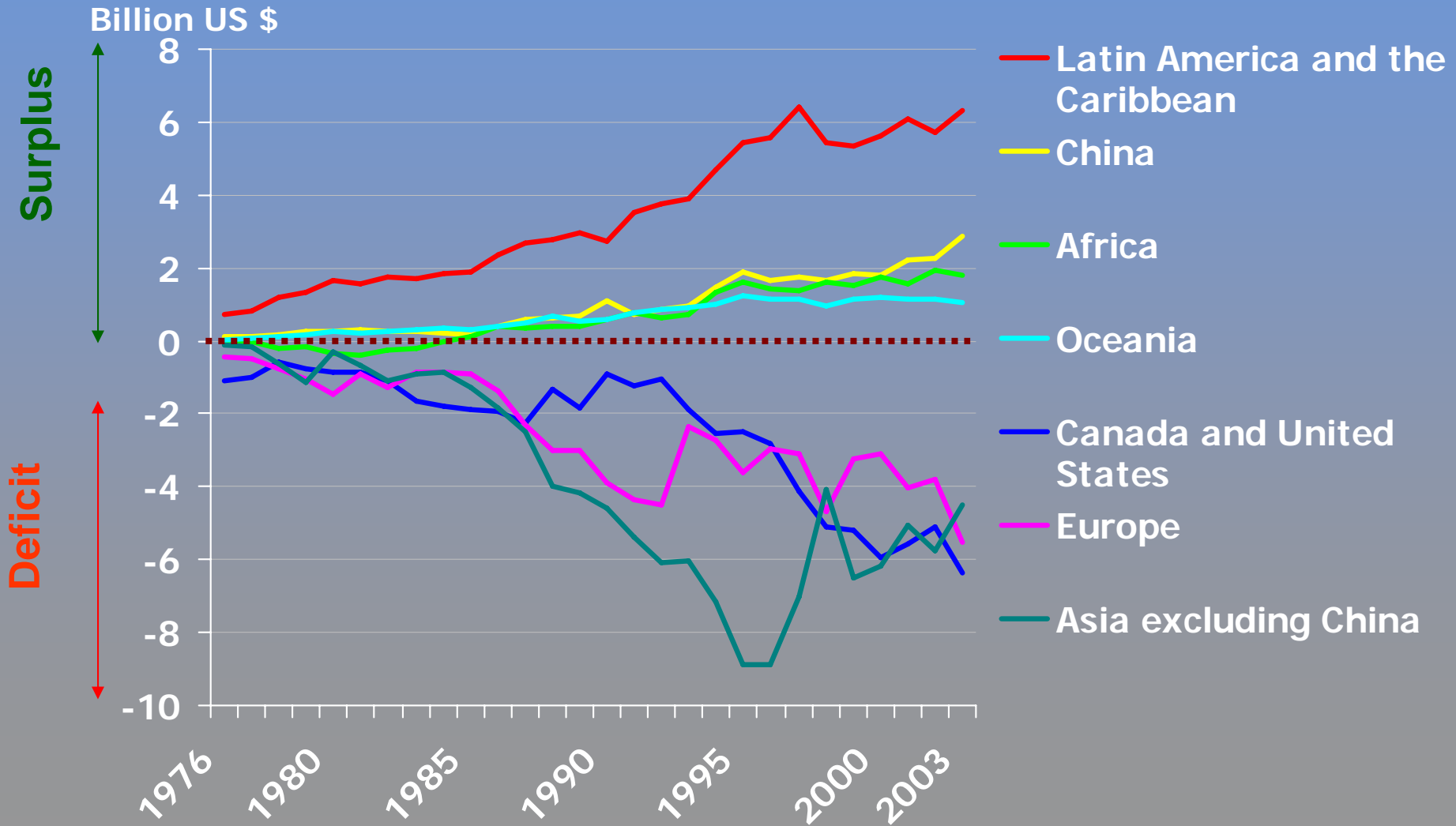
International trade



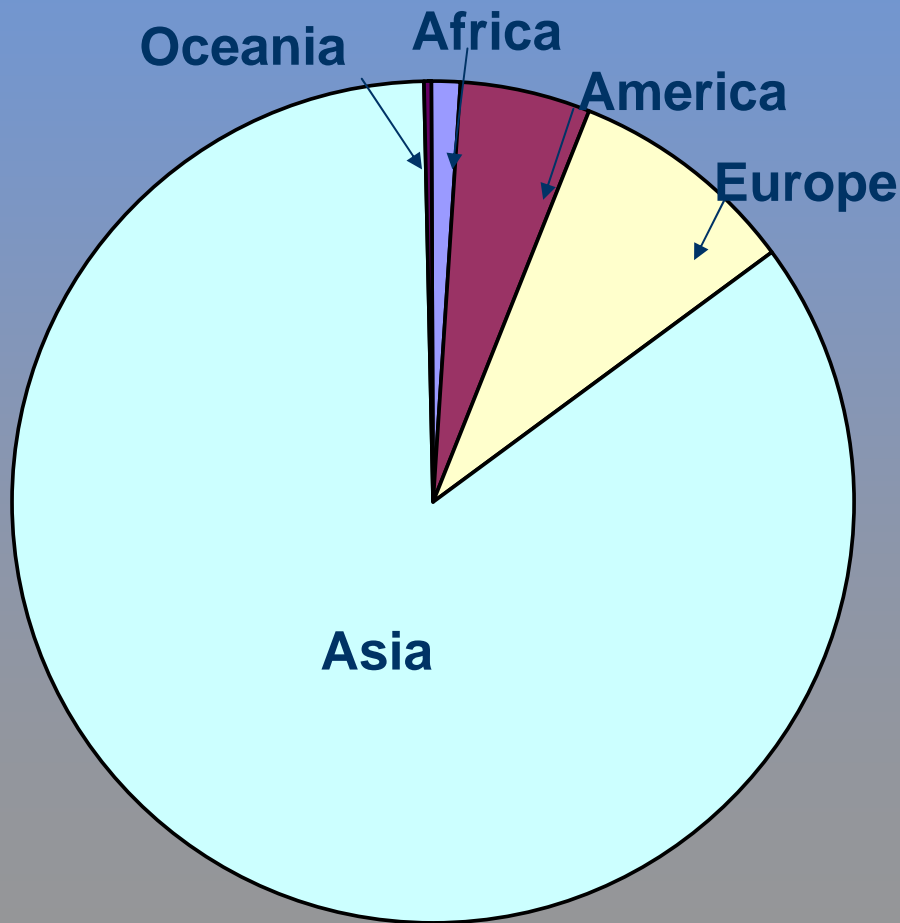
Growth rate

Trade has been growing at a reducing rate

Fish trade balance



Decked vessels > 100 tons



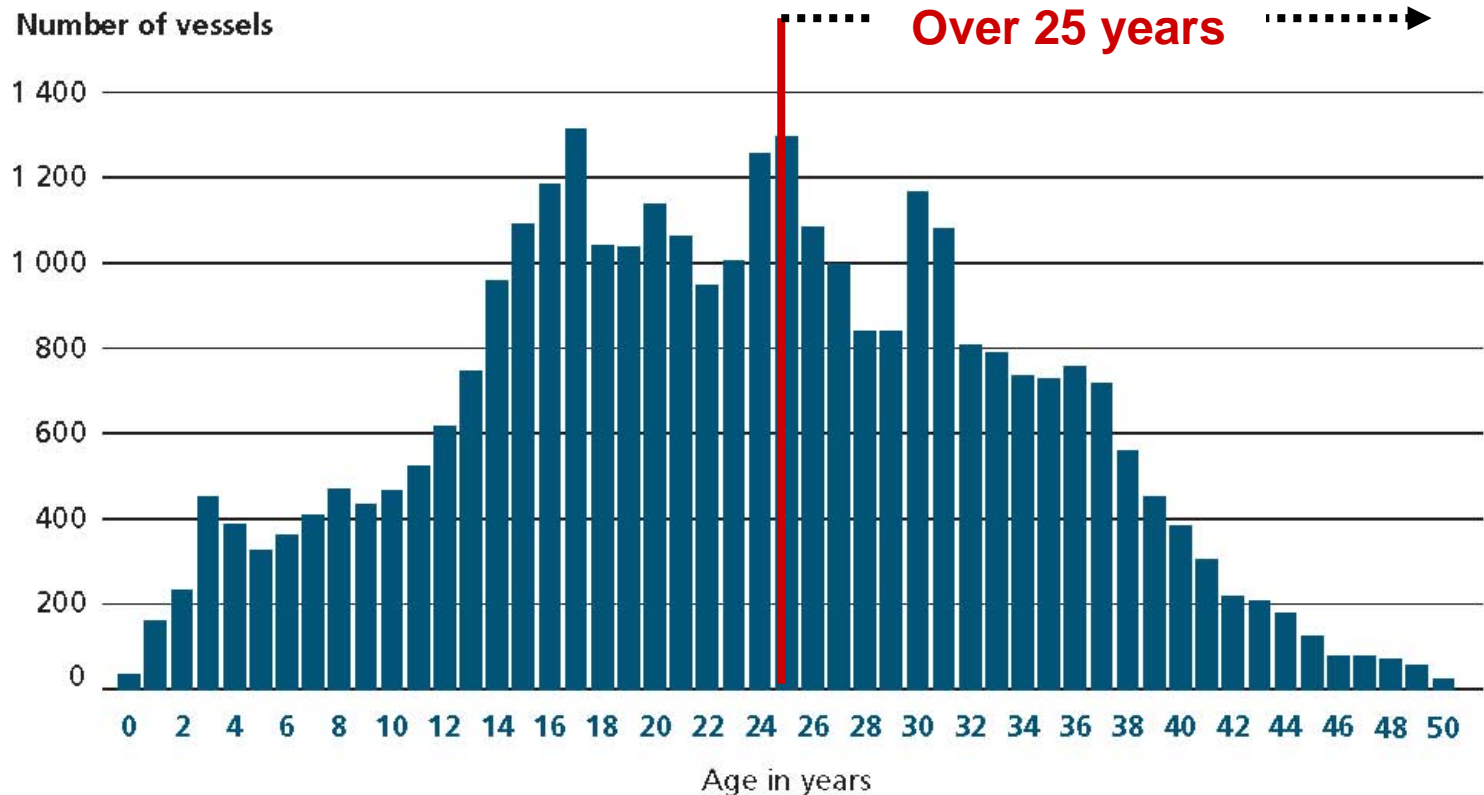
Close to 85%
of the large
vessels are in
Asia

Age of vessels > 100 tons (2003)



Figure 16

Age profile of global fleet above 100 GT in 2003



2. Selected issues

“Classical”

- ✦ Overfishing
- ✦ Overcapacity / fleet size
- ✦ Economic viability
- ✦ Subsidies
- ✦ Bycatch and discards
- ✦ Monitoring (MCS)
- ✦ Right-based systems
- ✦ Natural oscillations
- ✦ Fishmeal
- ✦ Statistics
- ✦ Capacity-building
- ✦ RFMOs
- ✦ Non-tariff barriers
- ✦ Precautionary approach

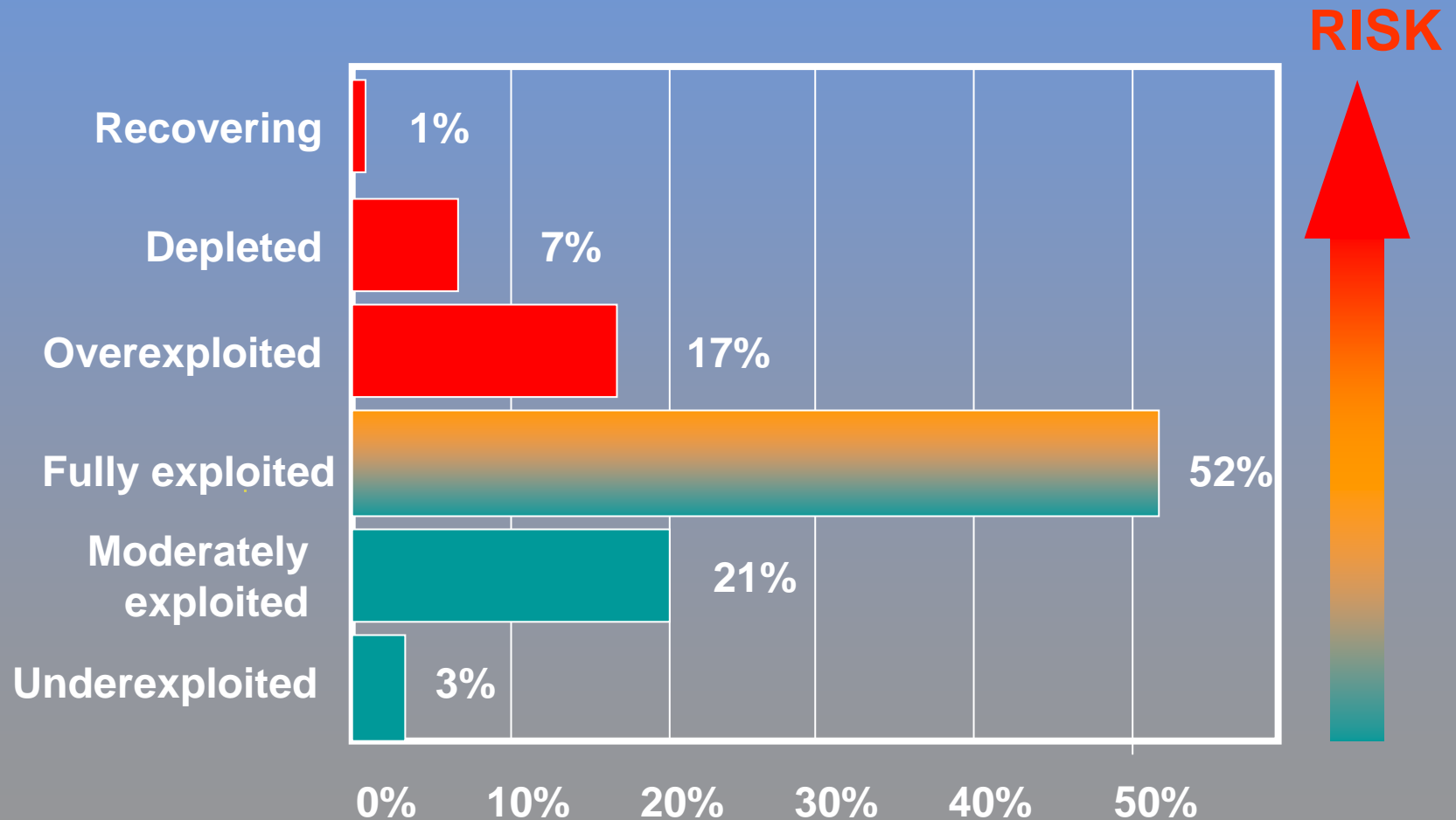
“New”

- ✦ Extinction and FAO-CITES
- ✦ Capture-based aquaculture
- ✦ Labor standards
- ✦ Catch certification
- ✦ Ecolabelling
- ✦ Deep sea fisheries
- ✦ Stock recovery
- ✦ Biodiversity, ecosystem

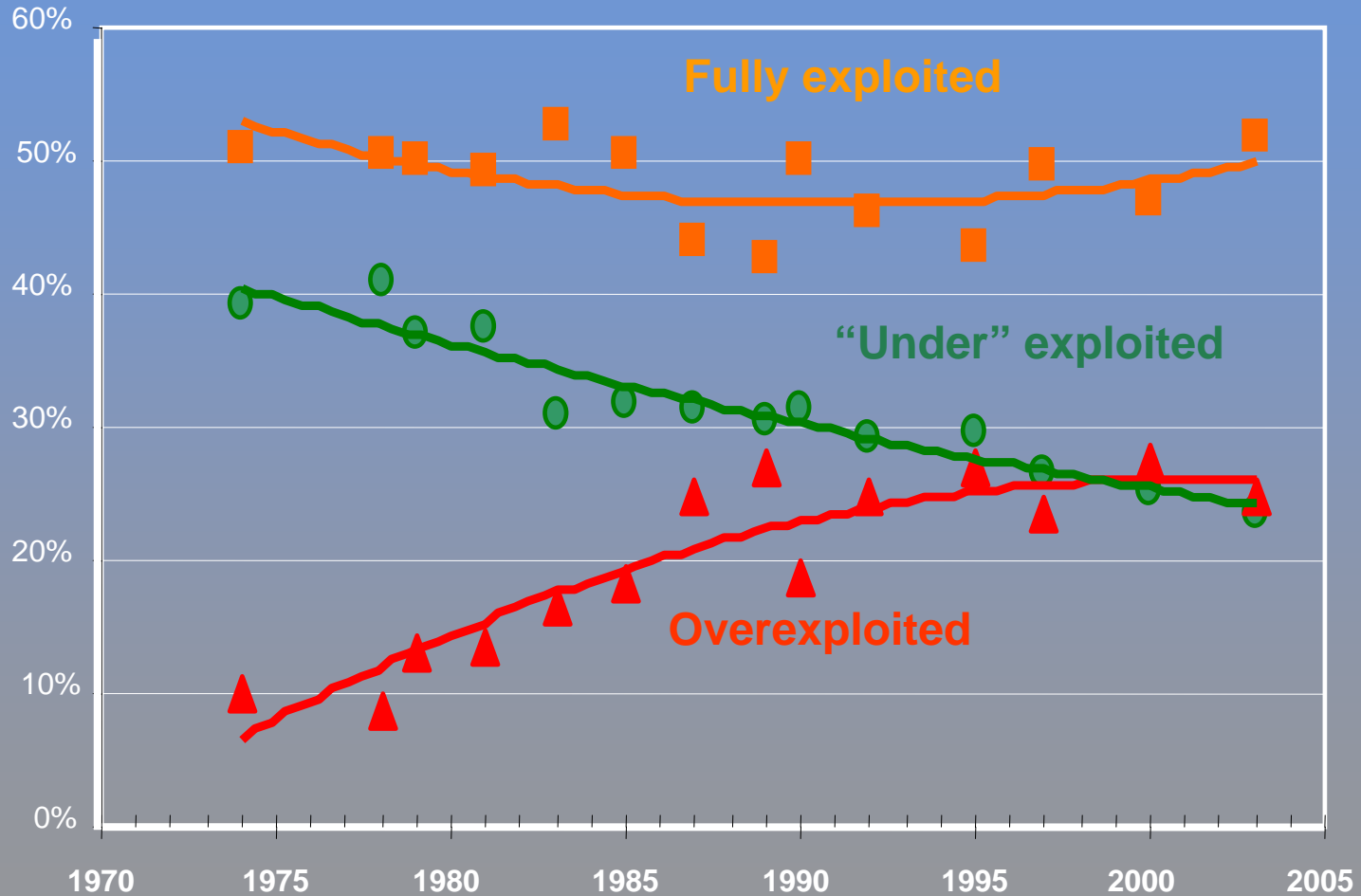
“Emerging”

- ✦ Risk management
- ✦ Fishery ethics
- ✦ Animal welfare

State of stocks: 2004

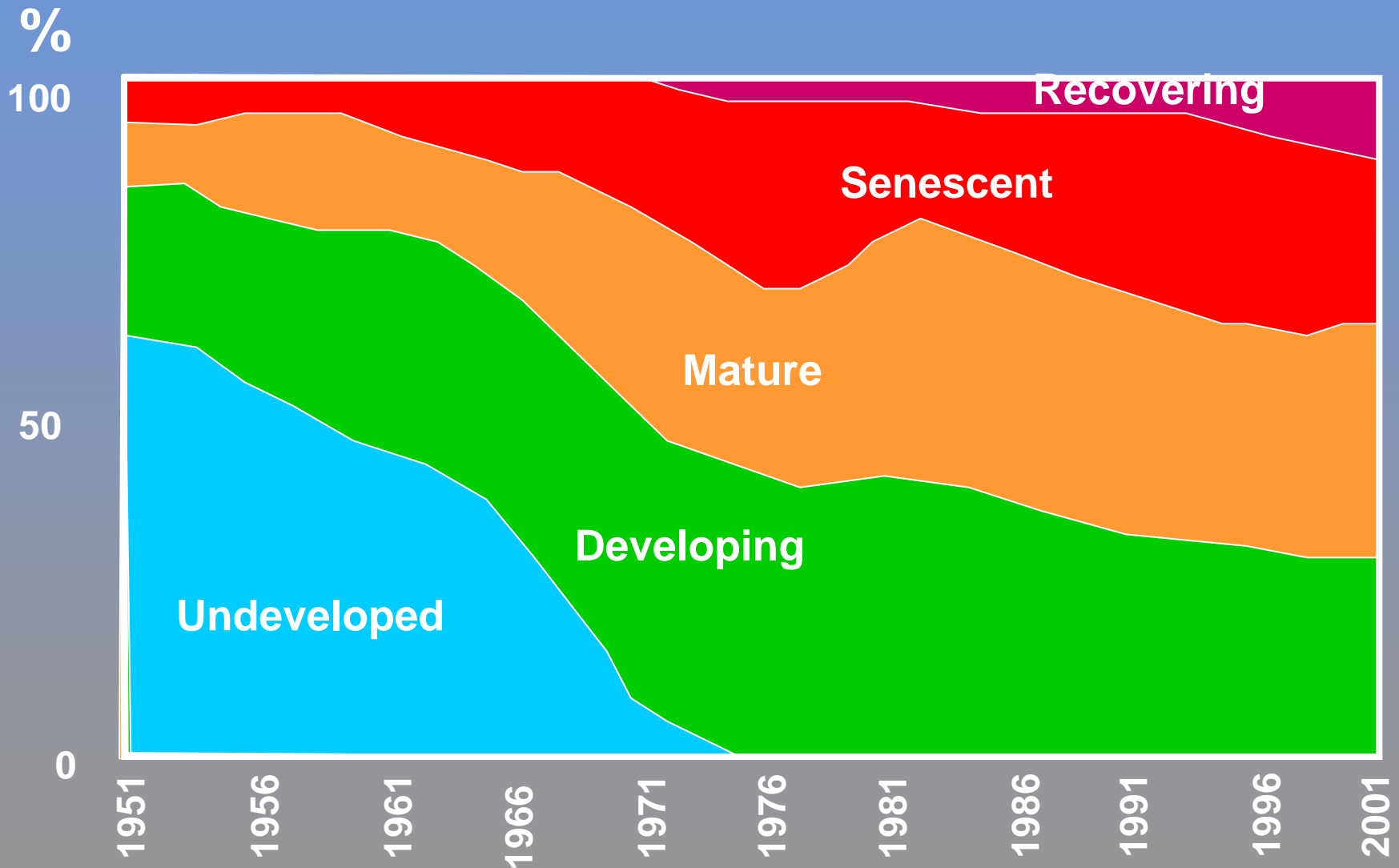


Stocks trends: 1974-2003





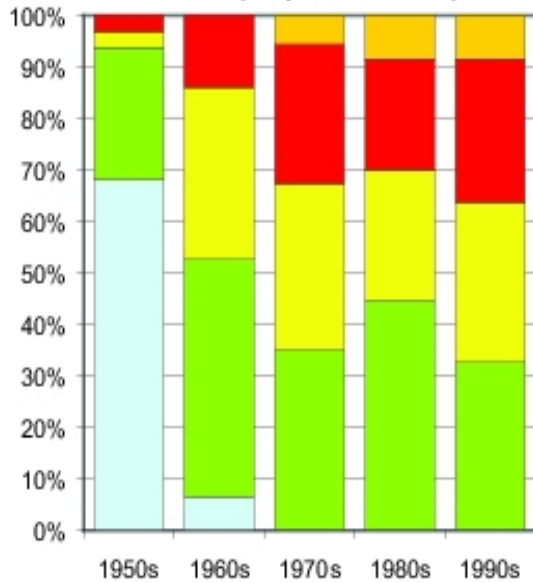
Overfishing



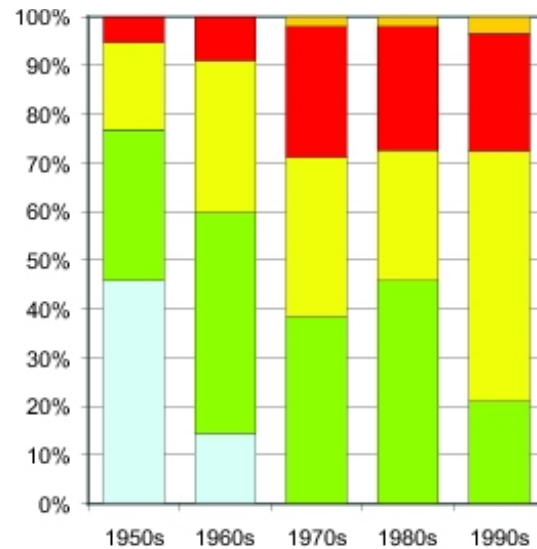
Source: FAO (Garcia, Grainger et De leiva, 2004)

State of selected resources

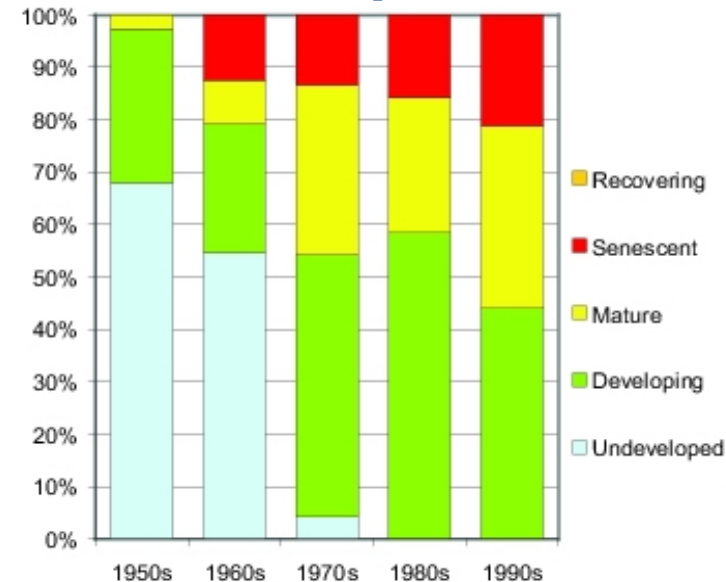
Top Predators



Other Predators

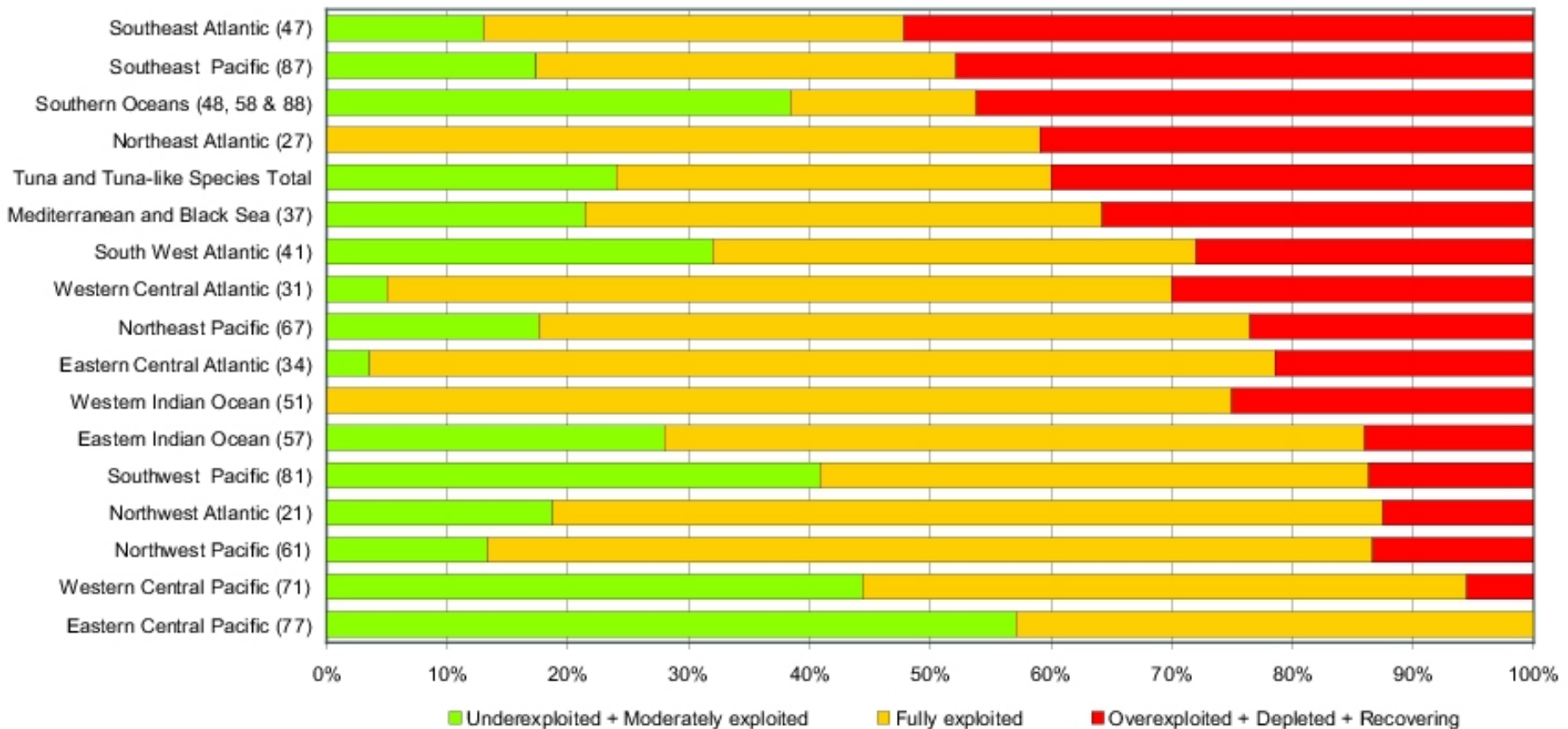


Epipelagic-Deepwater



State of stocks by region

Figure A2. 2 - Percentage of stocks exploited beyond MSY levels (O+D+R), at MSY levels (F), and below MSY levels (U+M) by FAO statistical areas in 2004

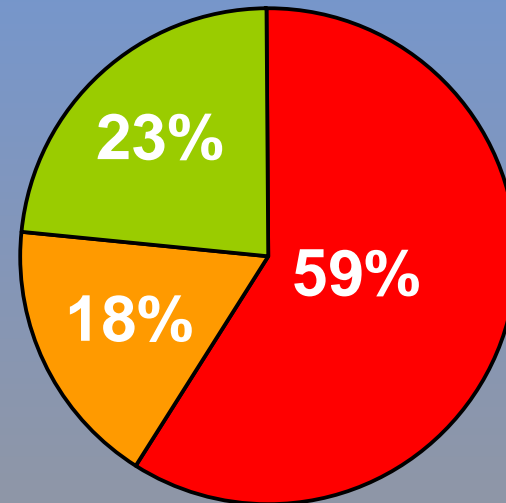


State of world tuna stocks

FISHING PRESSURE RELATIVE TO MSY

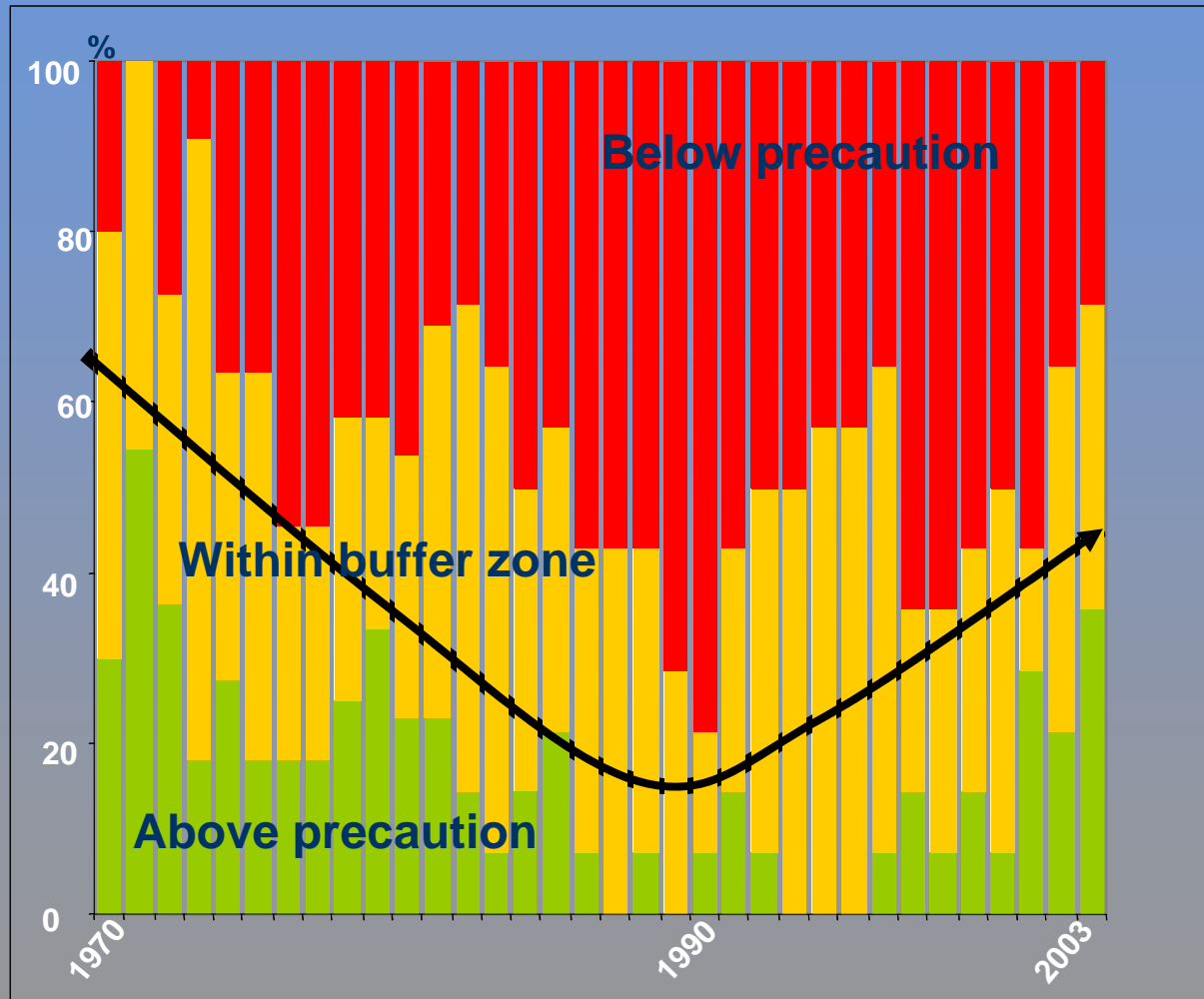


STOCK BIOMASS RELATIVE TO MSY

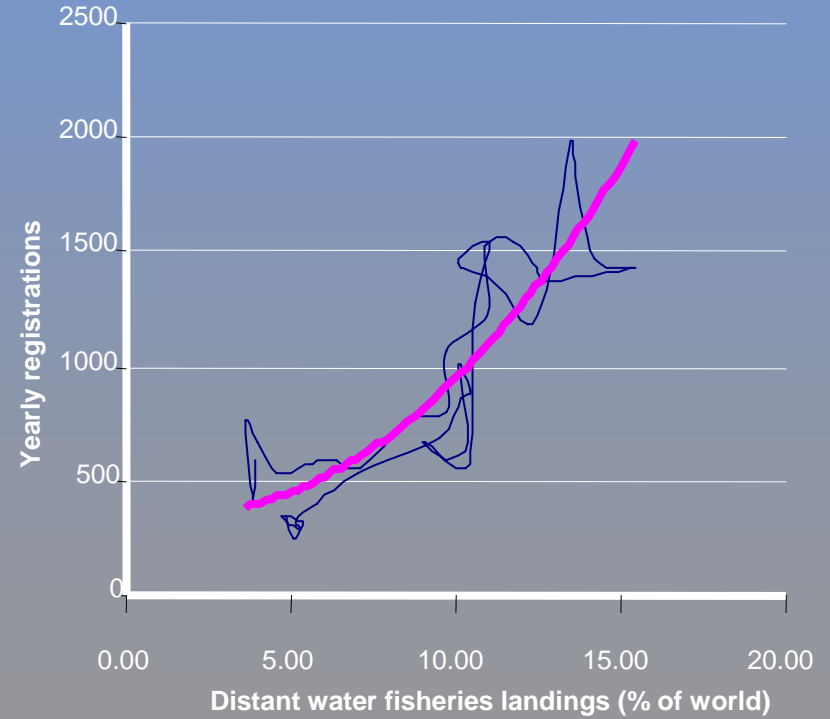
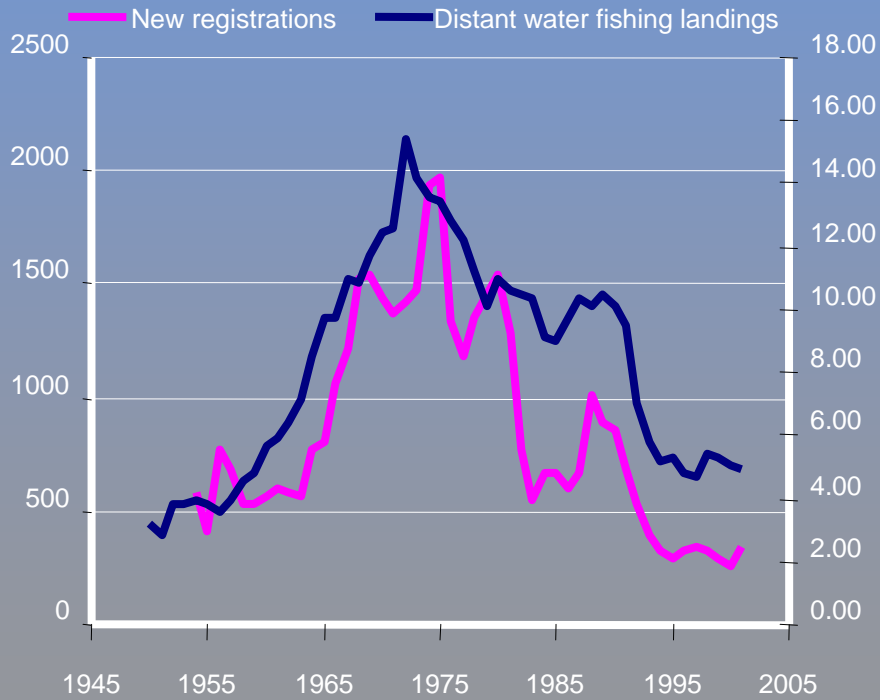


OVERALL

North Sea "recovery"

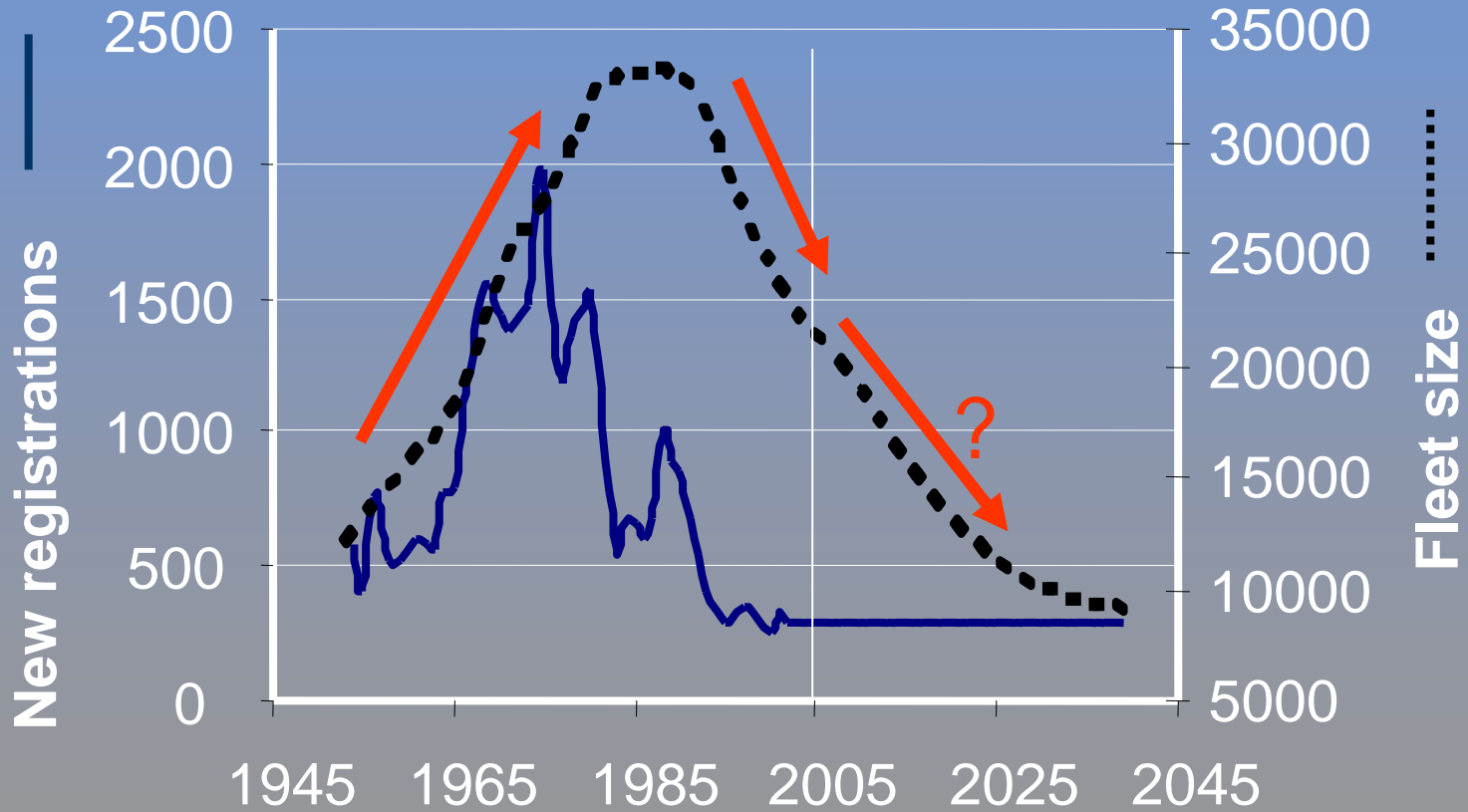


Fleet size: From past to future





Fleet size: From past to future



Deep sea: increased pressure!

Figure

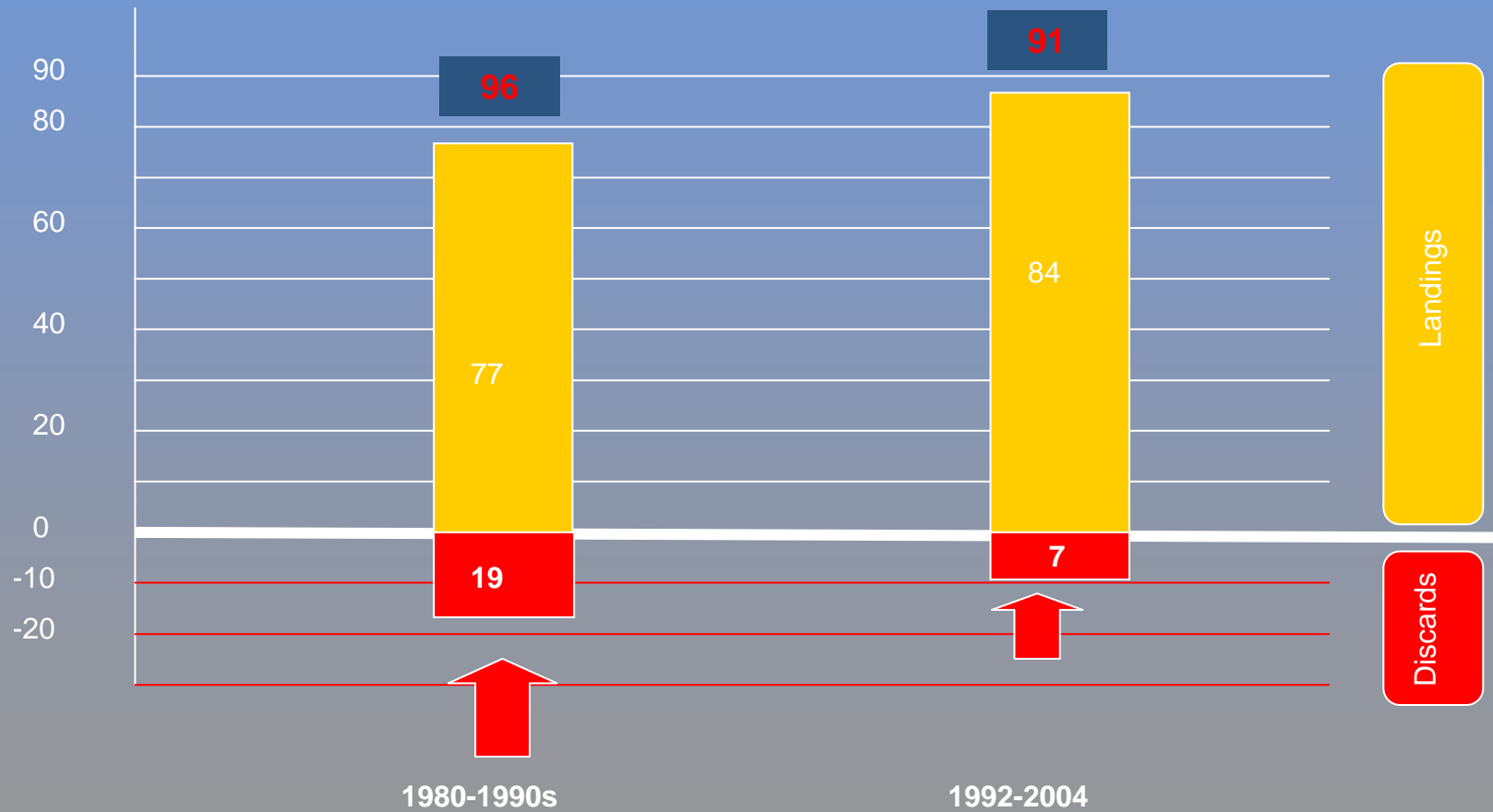
Bottom



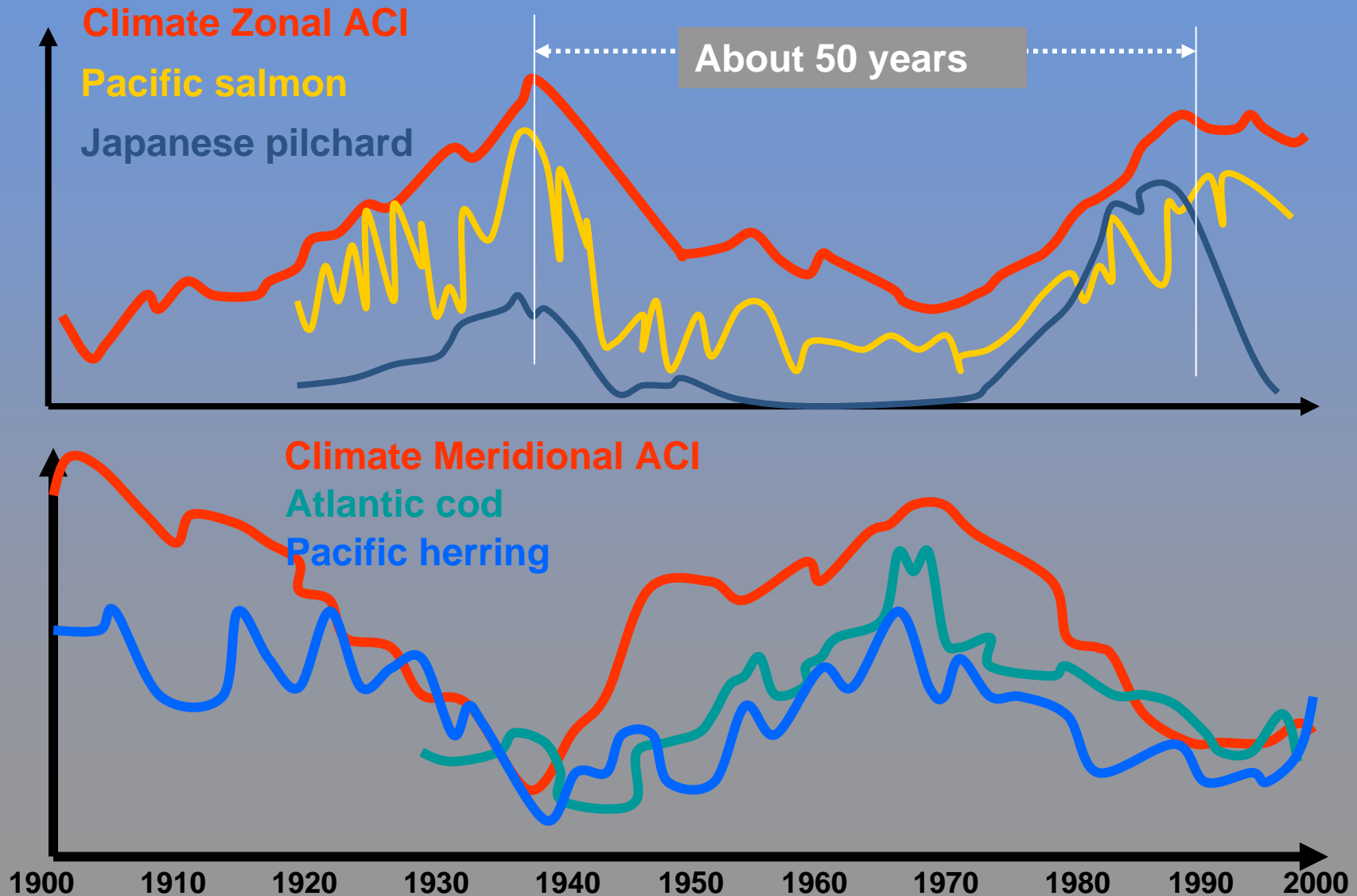
noaa.gov/

By catch and discards trends

Million tonnes

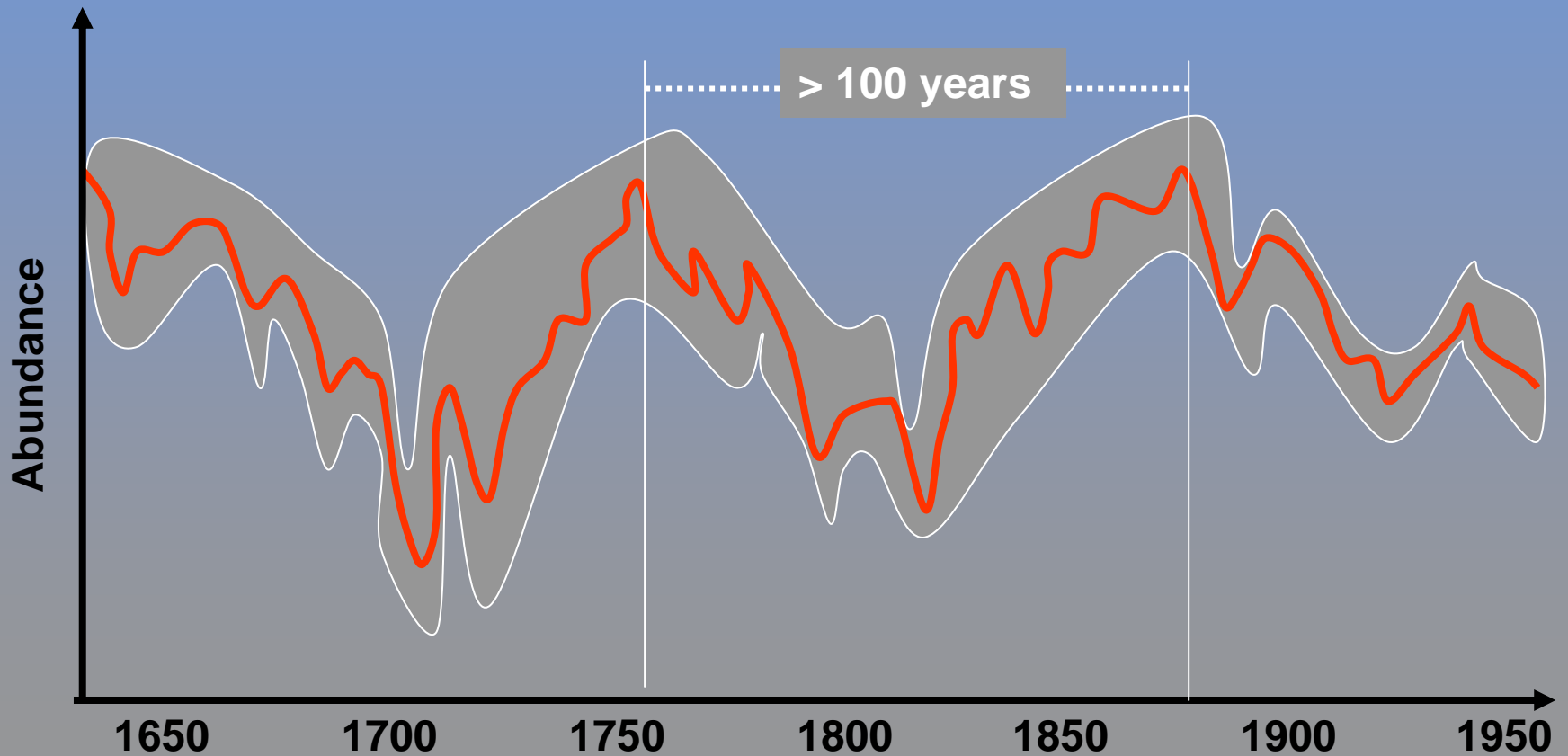


Natural oscillations

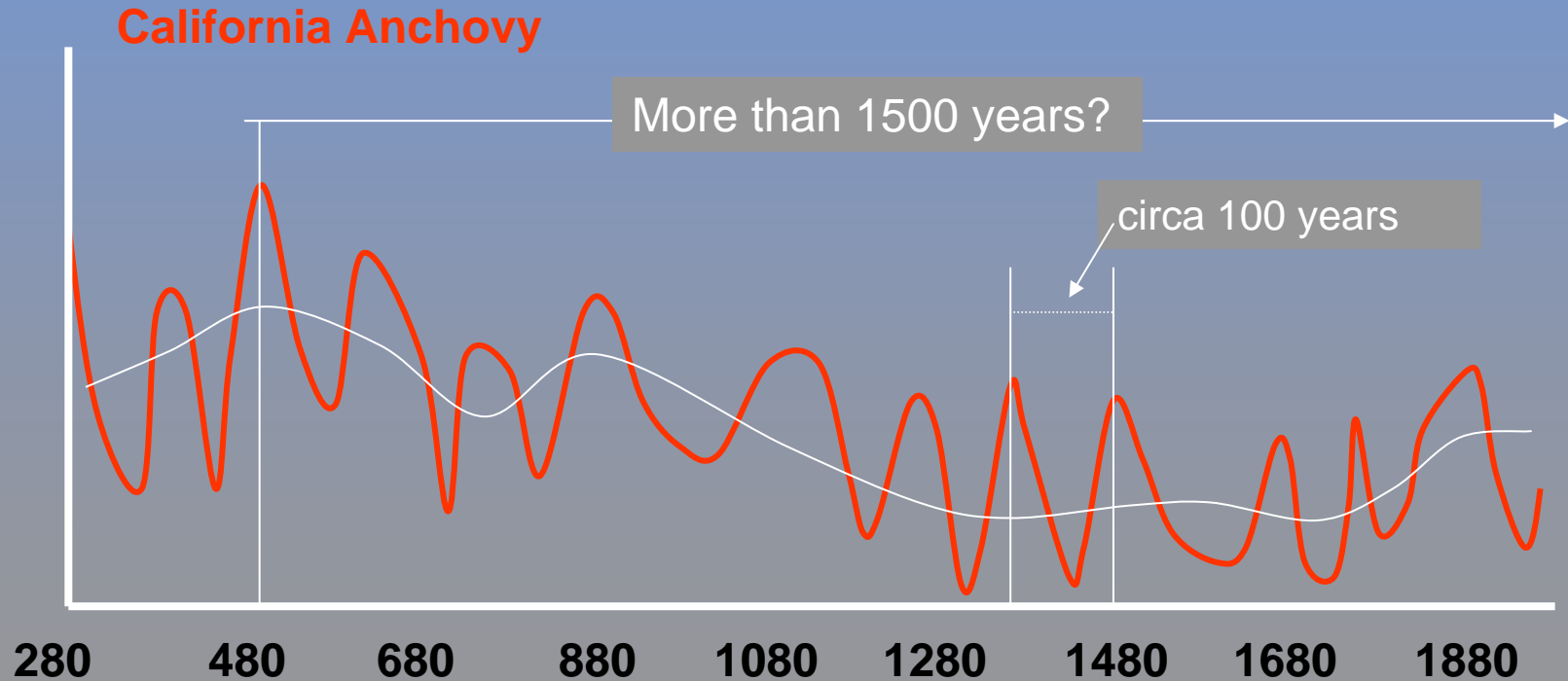


Natural oscillations

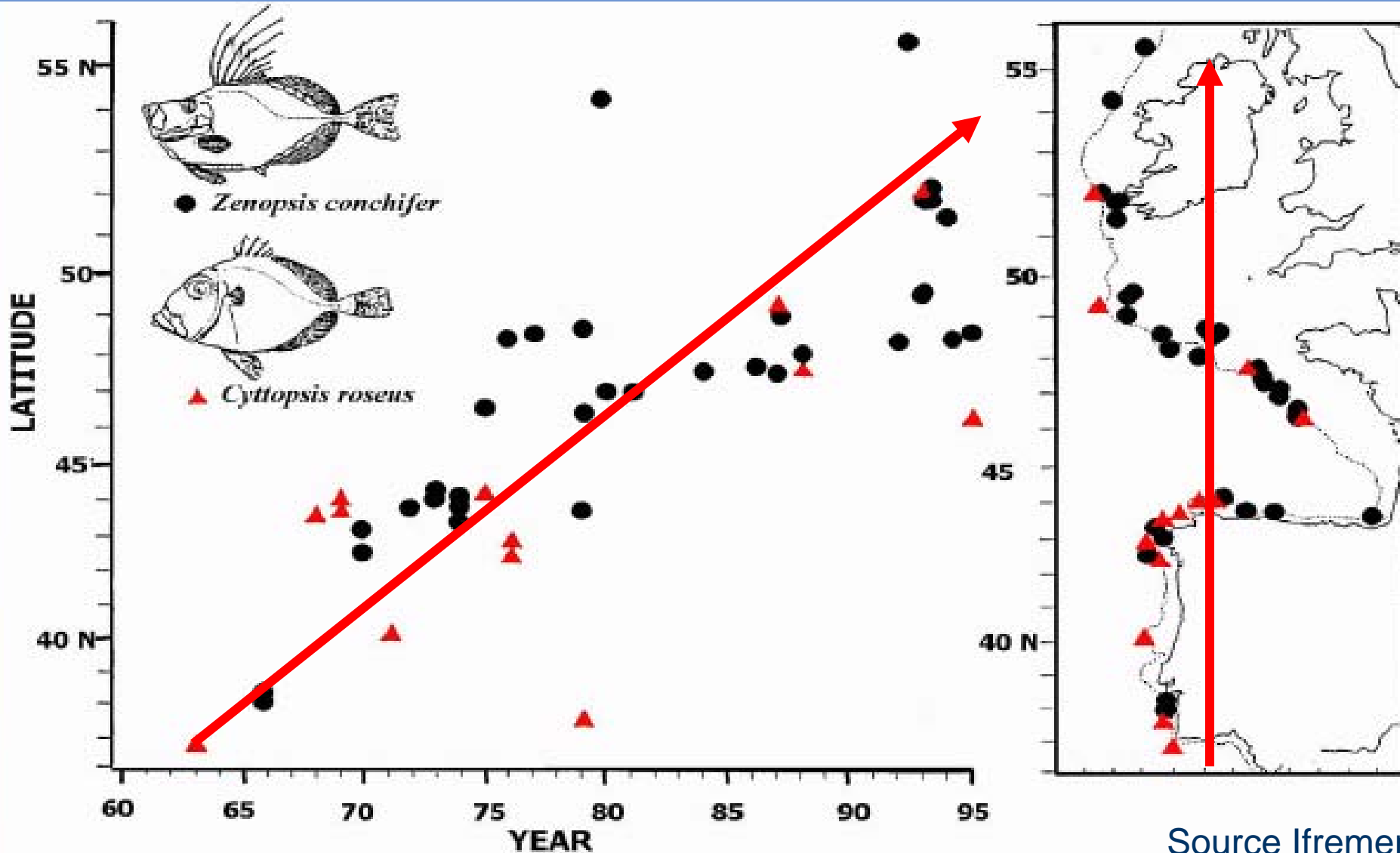
Mediterranean Bluefin tuna



Natural oscillations



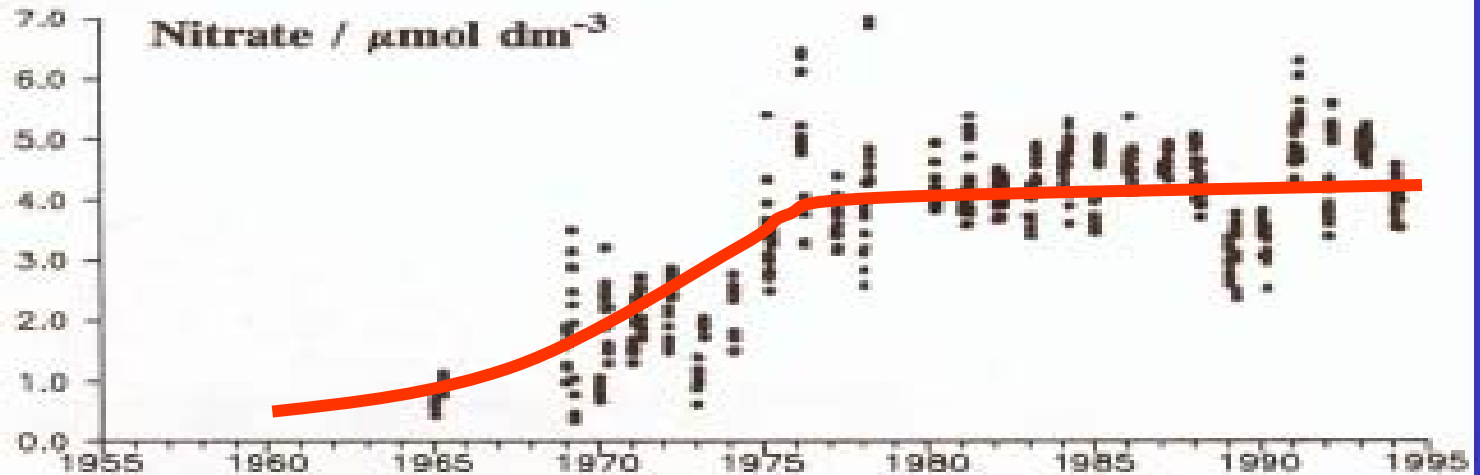
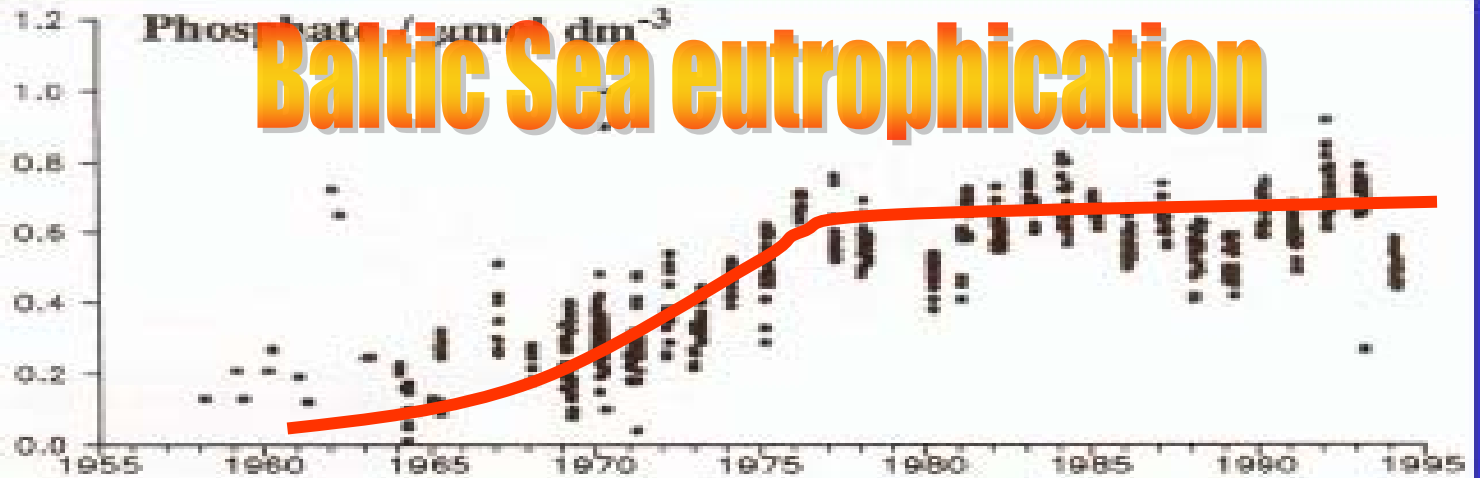
Climate change



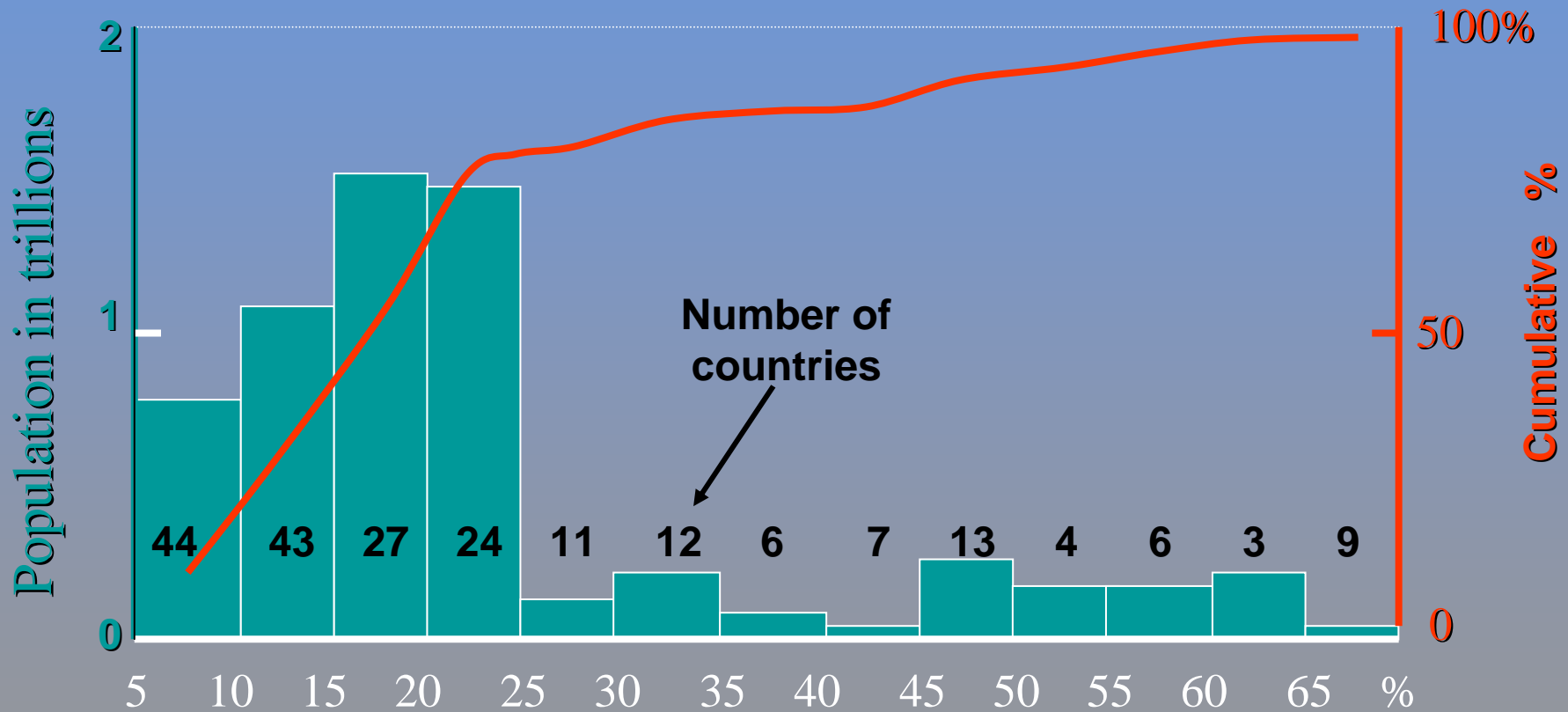
Environmental degradation



Baltic Sea eutrophication



Food security: Dependence on fish



Contribution of fish to animal protein consumption

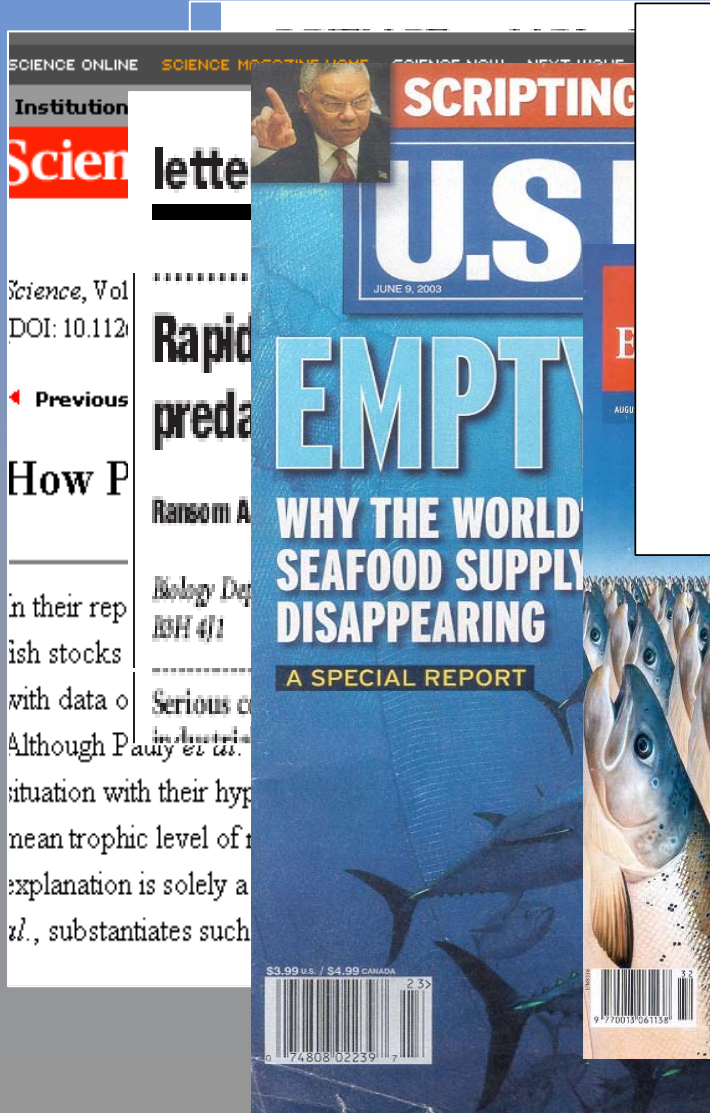
A collage of images related to agriculture and social response. It includes a woman in a floral dress and straw hat holding a large white fish, a group of people near a body of water, and a sunset over a field. The collage is set against a background of a globe and a blue arc.

3. Social response

- ✚ Media storming
- ✚ Consumer mobilisation
- ✚ Legal and policy frameworks



Media Storming



www.nytimes.com

The New York Times
ON THE WEB

November 30, 2001

Study Says Bad Data by China Inflated Global Fishing Yields

By ERIK ECKHOLM

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"Dirty Fishing" Emptying Oceans, Experts Say

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Sharon Guynup

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August 11, 2003

Consumer's pressure

FISHONLINE fish to eat

AVOID

Caviar, Beluga/Osetra/Sevruga
 Chilean Sea Bass
 Cod, Atlantic/Icelandic
 Crab, King (*imported*)
 Lingcod
 Monkfish
 Orange Roughy
 Rockfish/Rock Cod/Pacific Snapper
 (*trawl-caught*)
 Salmon (*farmed/Atlantic*)
 Sharks (*except U.S. West Coast
 Thresher*)
 Shrimp (*imported*)
 Sturgeon (*wild-caught*)
 Swordfish (*Atlantic*)
 Tuna, Bluefin

AK = Alaska
 BC = British Columbia
 CA = California
 OR = Oregon
 U.S. = United States
 WA = Washington
 * = includes bottom longline

Choices for Healthy Oceans

You Have the Power

Your consumer choices make a difference. Choose seafood from the **Best Choices** list to support those fisheries and fish farms that are healthier for ocean wildlife and the environment.

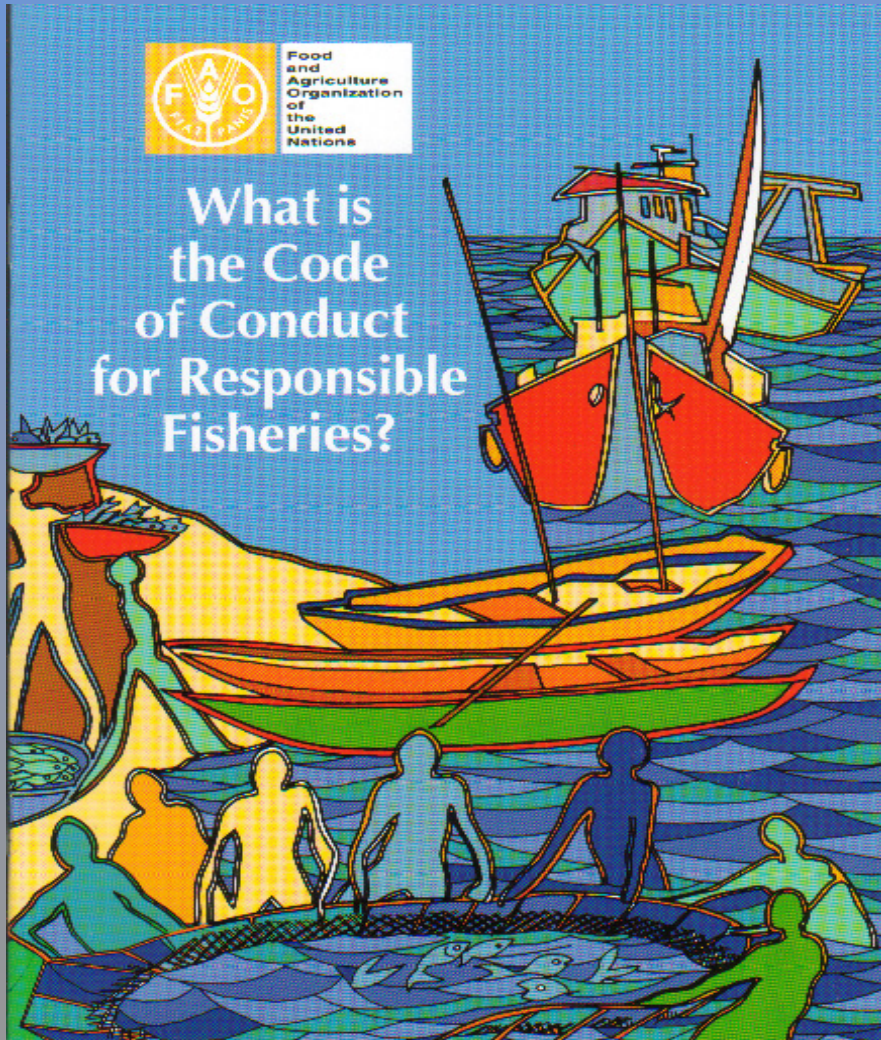
How to Use This Guide

It's OK to ask questions when shopping or eating out. Ask staff where their seafood is from. Is it farmed or wild-caught? How is it caught? If they're not sure, choose something else.

We update this pocket guide at least twice a year. Visit our web site to obtain the latest version and learn more about seafood.

www.montereybayaquarium.org

Policy changes



The Code of Conduct: the agreed charter towards more responsible fisheries

A collage of images related to agriculture and fishing. It includes a woman in a floral dress and a straw hat holding a large white fish, a group of people in a field, a sunset over water, and people working in a boat. The collage is set against a background of a globe and a blue arc.

4. Outlook

- + Action required
- + Main obstacles
- + Old demons and emerging issues



Stronger commitment towards:

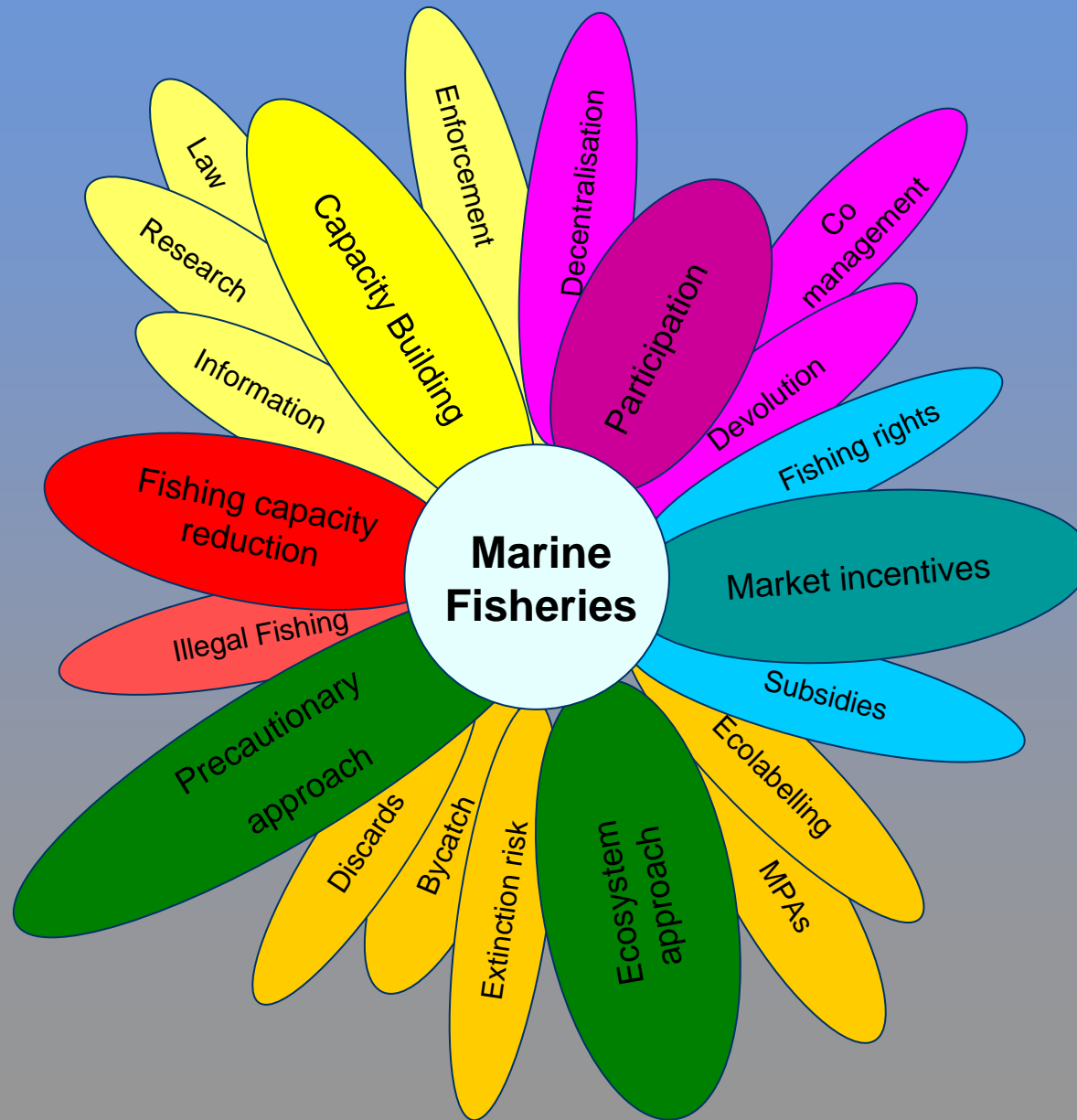
- ✚ An ecologically sustainable future
- ✚ A more responsible governance and industry (High seas)
- ✚ Further institutional reform towards more and better participation, anticipation, precaution, integration, monitoring and evaluation, decision-making and longer-term perspective;
- ✚ A redirected science: more inter-disciplinary, towards and with stakeholders, ecosystem-conscious, aimed at forecasting, risk assessment and policy-making;
- ✚ A more effective implementation of existing instruments.



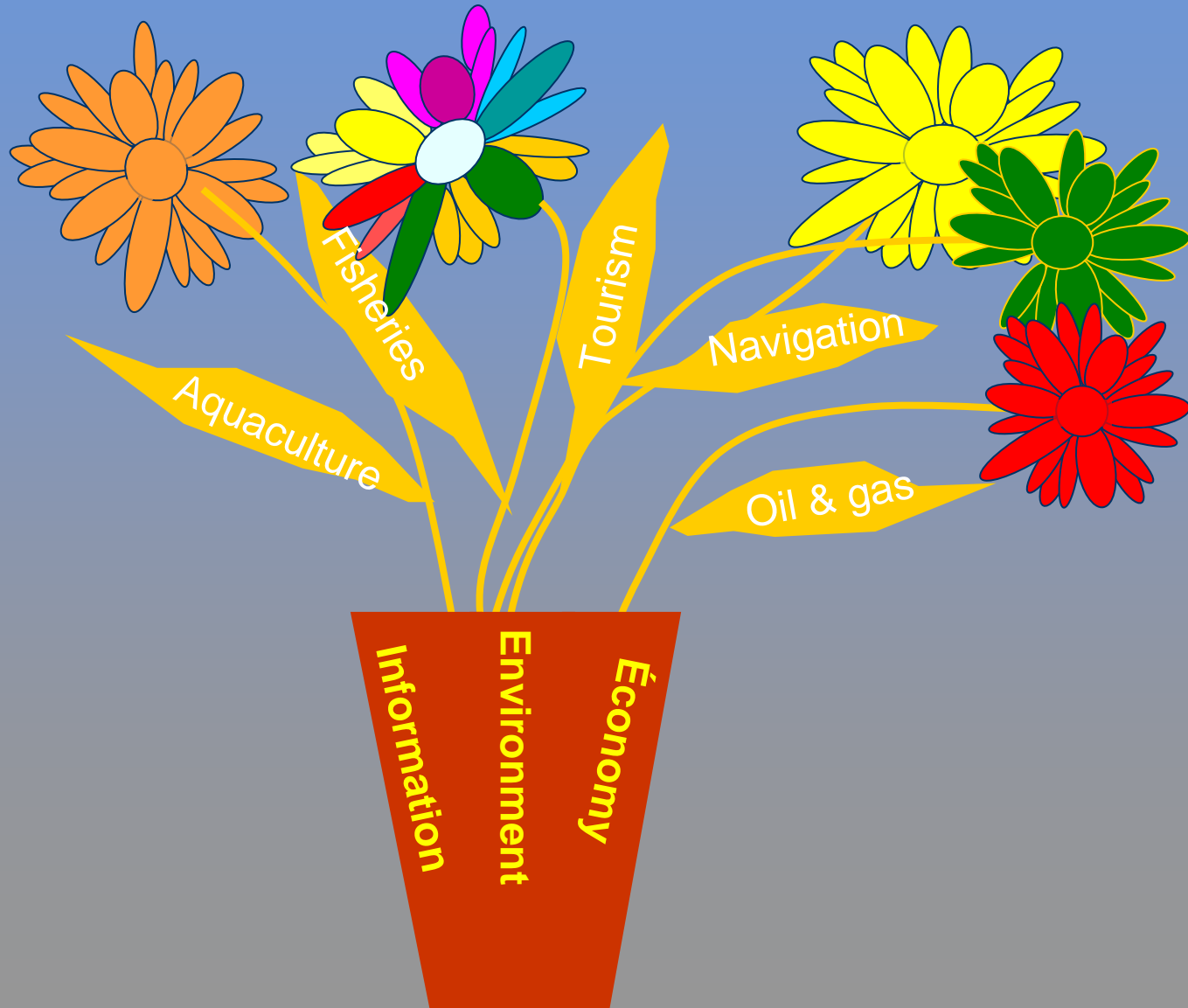
Changing management policy

- ✚ **Progressively eliminate old problems**
 - ✚ Reduce / suppress overcapacity and perverse subsidies
 - ✚ Improve habitat protection and selectivity
- ✚ **Pragmatically promote local democratic institutions**
 - ✚ Support local civic education
 - ✚ Develop local governance capacity
- ✚ **Transfer sufficient and appropriate powers**
 - ✚ Allocate secured communal or individual rights
 - ✚ Ensure equitable adjudication
 - ✚ Support equity and justice
- ✚ **Establish minimum environmental standards**
 - ✚ Identify societal objectives and natural constraints
 - ✚ Develop indicators for monitoring and evaluation

The Fisheries "Tool Box"



Sectoral integration





Main obstacles

- ✚ Further broadening of an already large and contradictory set of objectives;
- ✚ Misfit between:
 - ✚ The expectations of the users the available resources;
 - ✚ The urgency of regulation and the social resilience to it;
 - ✚ The ideal and affordable degree of integration and participation
 - ✚ The desirable and affordable Information.



Emerging issues

- ✚ Fisheries ethics and human rights
- ✚ Bioethics and animal welfare
- ✚ Intrusion of tribunals in decision-making (and governance)
- ✚ Globalization by the market.



Old demons

- ✚ Excess fishing capacity
- ✚ Perverse subsidies
- ✚ Poor selectivity and unethical discards
- ✚ Critical habitats degradation
- ✚ Abuse of the <<freedom>> in the high seas
- ✚ Non-deterrent coercion
- ✚ Under-funded research
- ✚ Dominance of short-term concerns and market forces

A collage of several small images related to fishing and aquaculture, including a woman holding a large fish, people in a boat, and a sunset over water.

See more....

SOFIA at:

<ftp://ftp.fao.org/docrep/fao/007/y5852e/y5852e00.pdf>

State of World Marine Fishery Resources

http://www.fao.org/documents/show_cdr.asp?url_file=/DOCREP/007/y5600e/y5600e00.htm

THE STATE OF
Thank you for your attention

2004