

Leveraging South-South Trade in Fisheries

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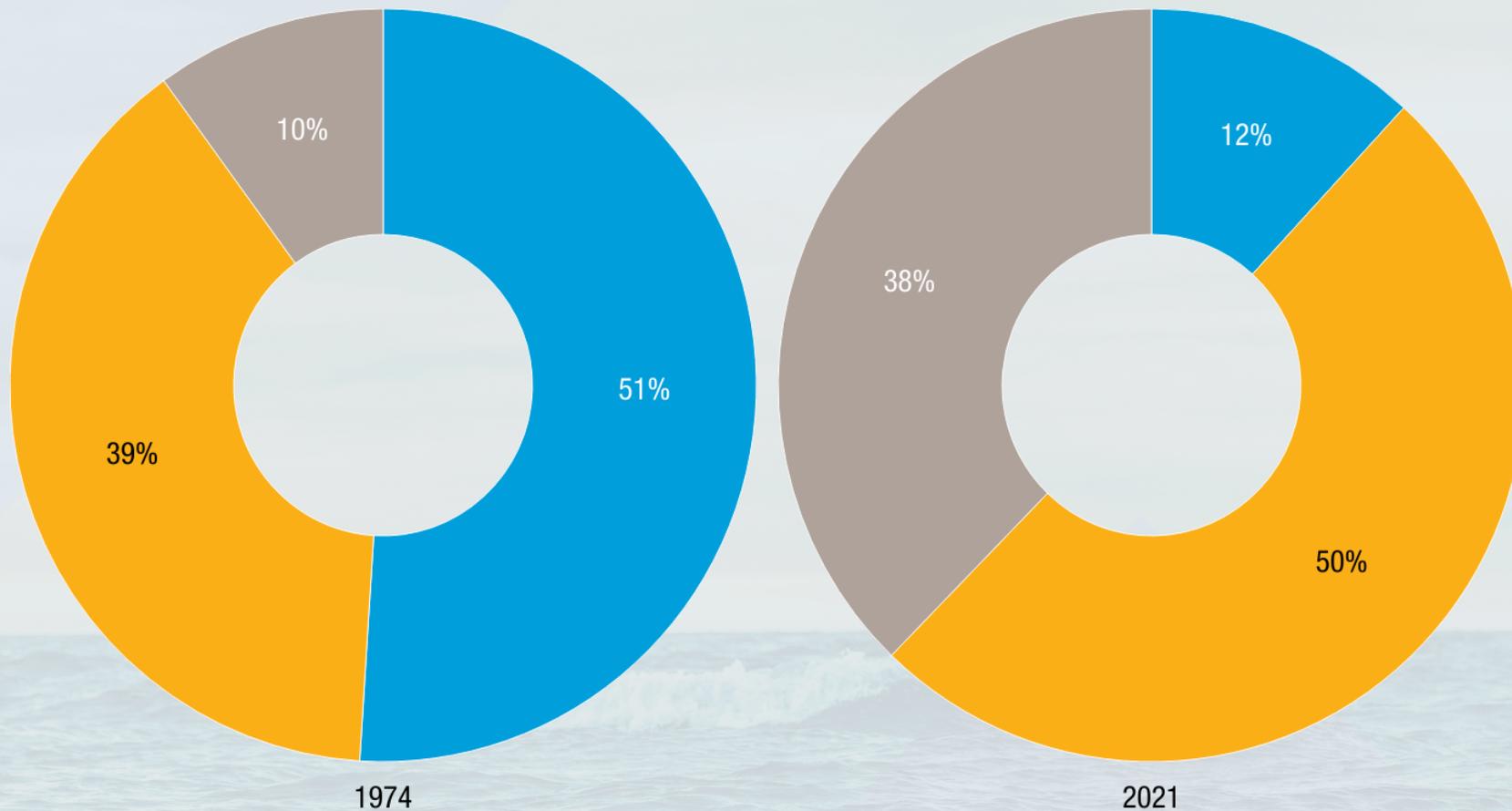




88 per cent of marine fishery stocks are overfished or maximally sustainably fished, up from 49 per cent in 1974

Percentage of fish stocks

Underfished Maximally sustainably fished Overfished



The share of overfished stocks has nearly quadrupled since 1974

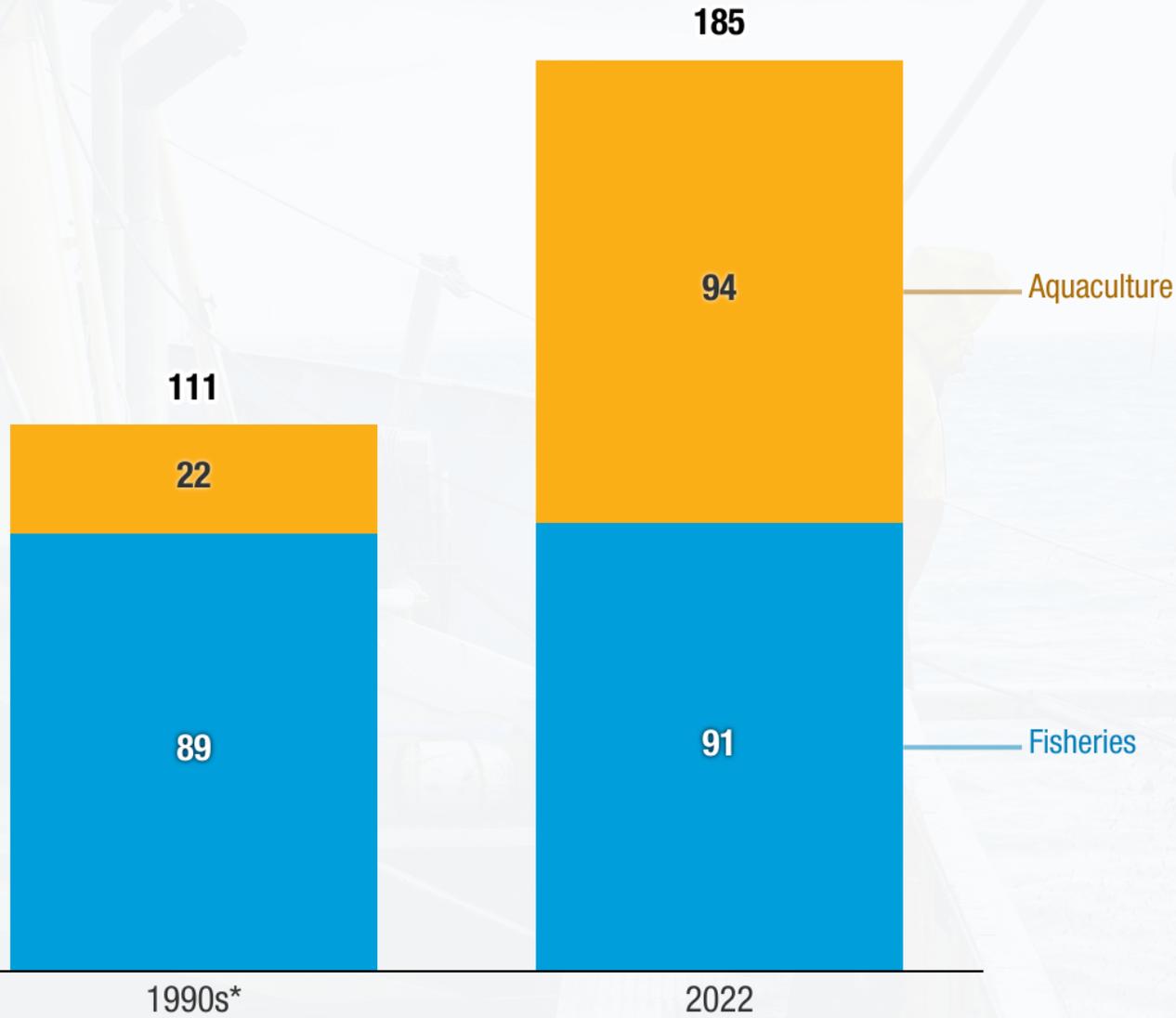
Source: FAO (2024)

Note: FAO defines a fish population as maximally sustainably fished when its biomass is above 80 percent but below 120 percent of the target level.



Since the 1990s, aquaculture as a share of global aquatic production increased from 20 to 51 per cent

Global production of aquatic animals, million tonnes

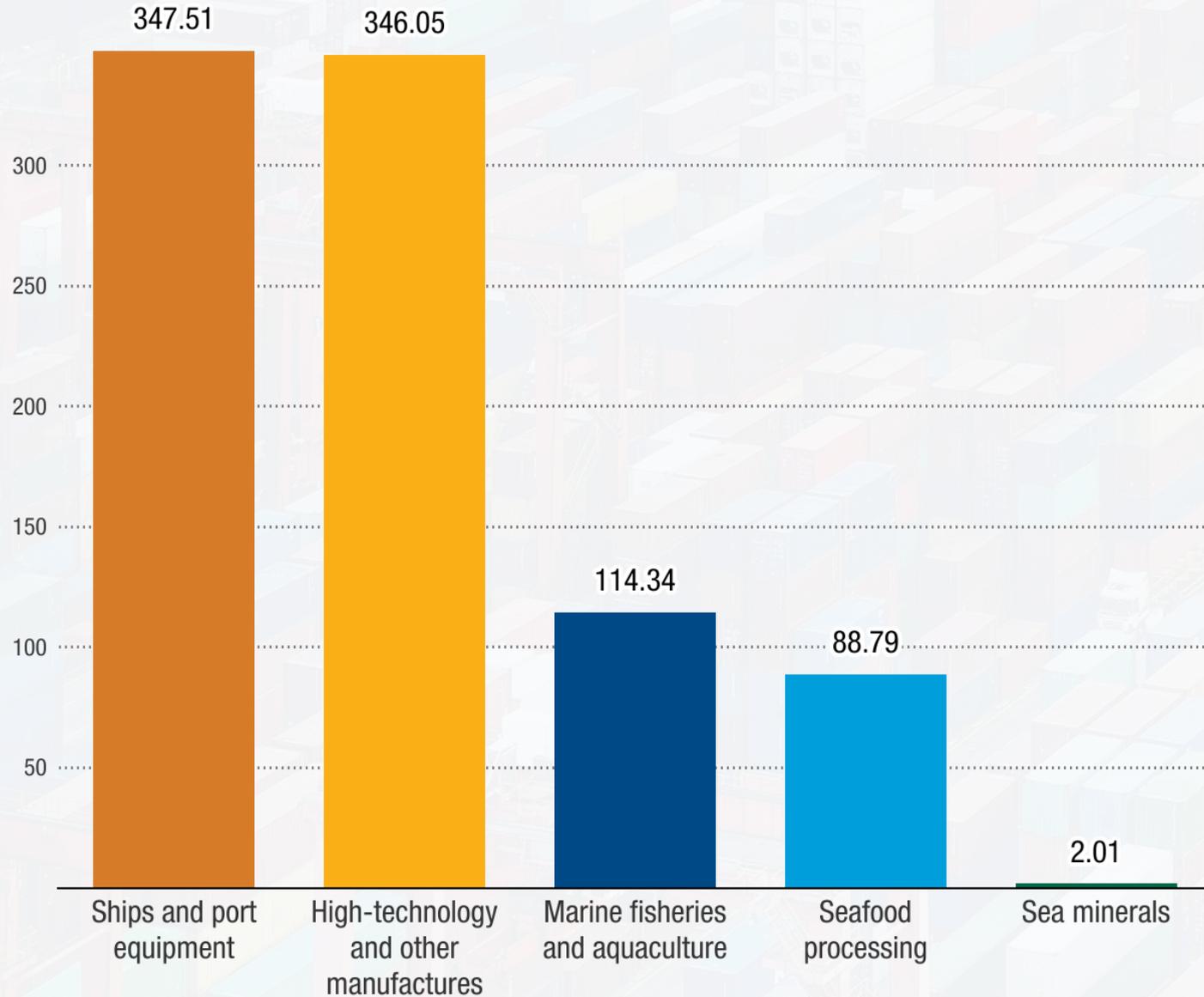


Aquaculture provides an alternative to overfishing and now represents over half of total production



Fisheries-related sectors account for 23 per cent of total ocean based goods exports.

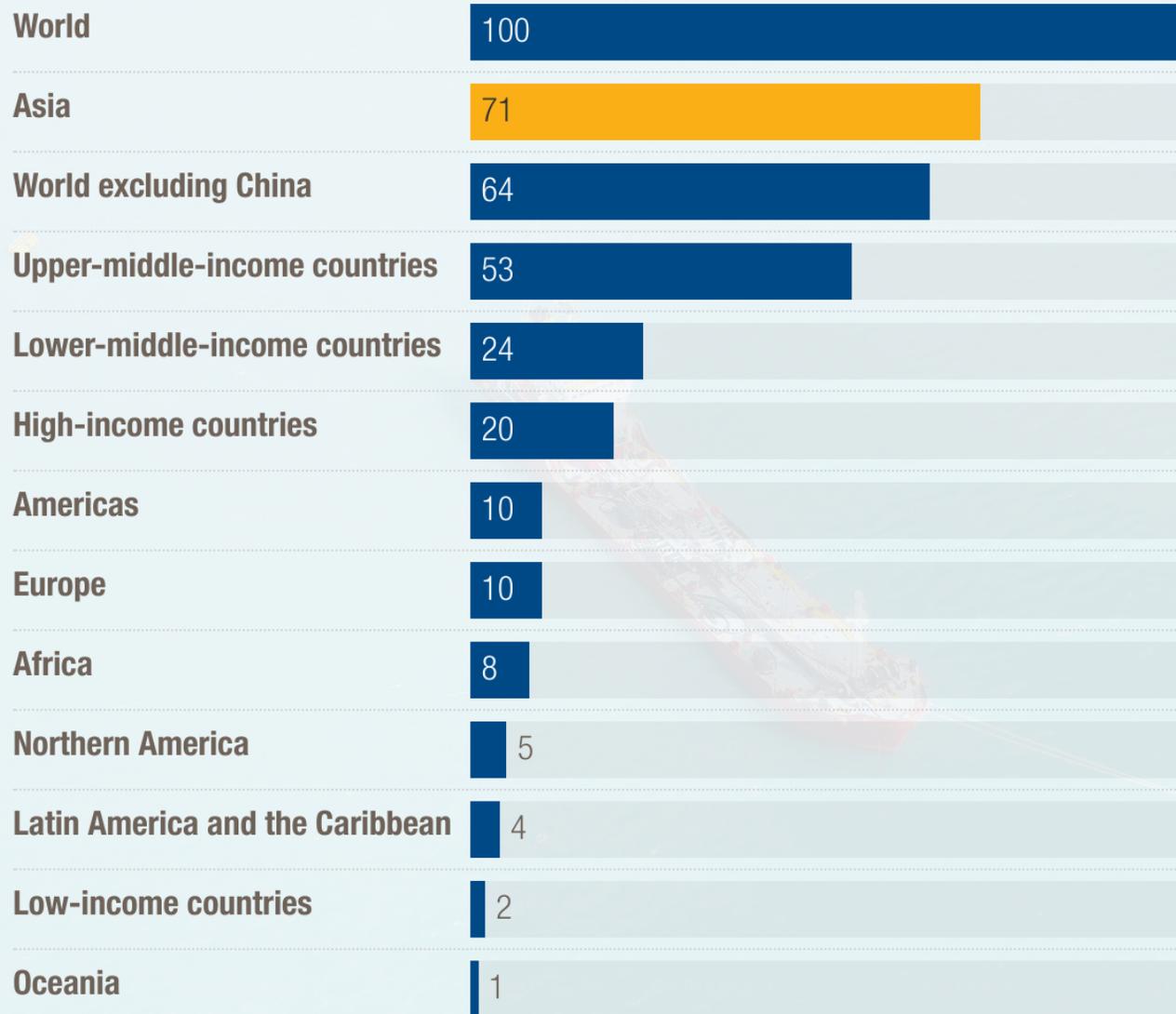
Exports per category of ocean-based goods, 2023, billion \$



The fisheries value chain accounted for \$203 billion in global trade in 2023

➤ Apparent consumption of aquatic foods

Percentage of world total



Source: UNCTAD, 2025 based on FAO, SOFIA report, 2024

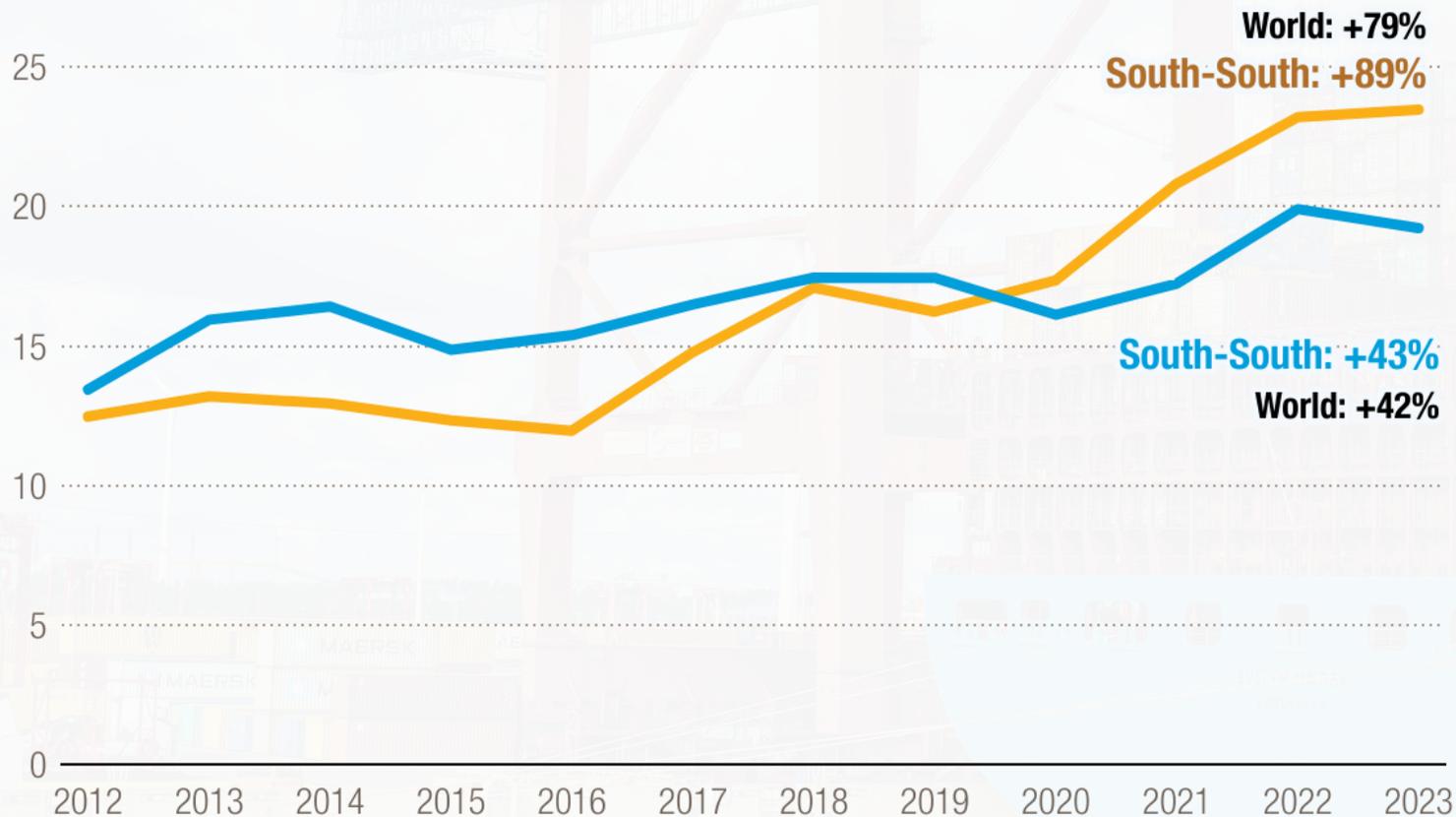
Nearly three quarters of apparent food consumption of aquatic animals is in Asia, of which half is in China



South-South fisheries trade is outpacing global trade

South-South trade in billion dollars (left axis) and growth rate 2012–2023

— Processed marine fisheries — Primary marine fisheries



Source: UNCTAD (2025) Ocean trade database

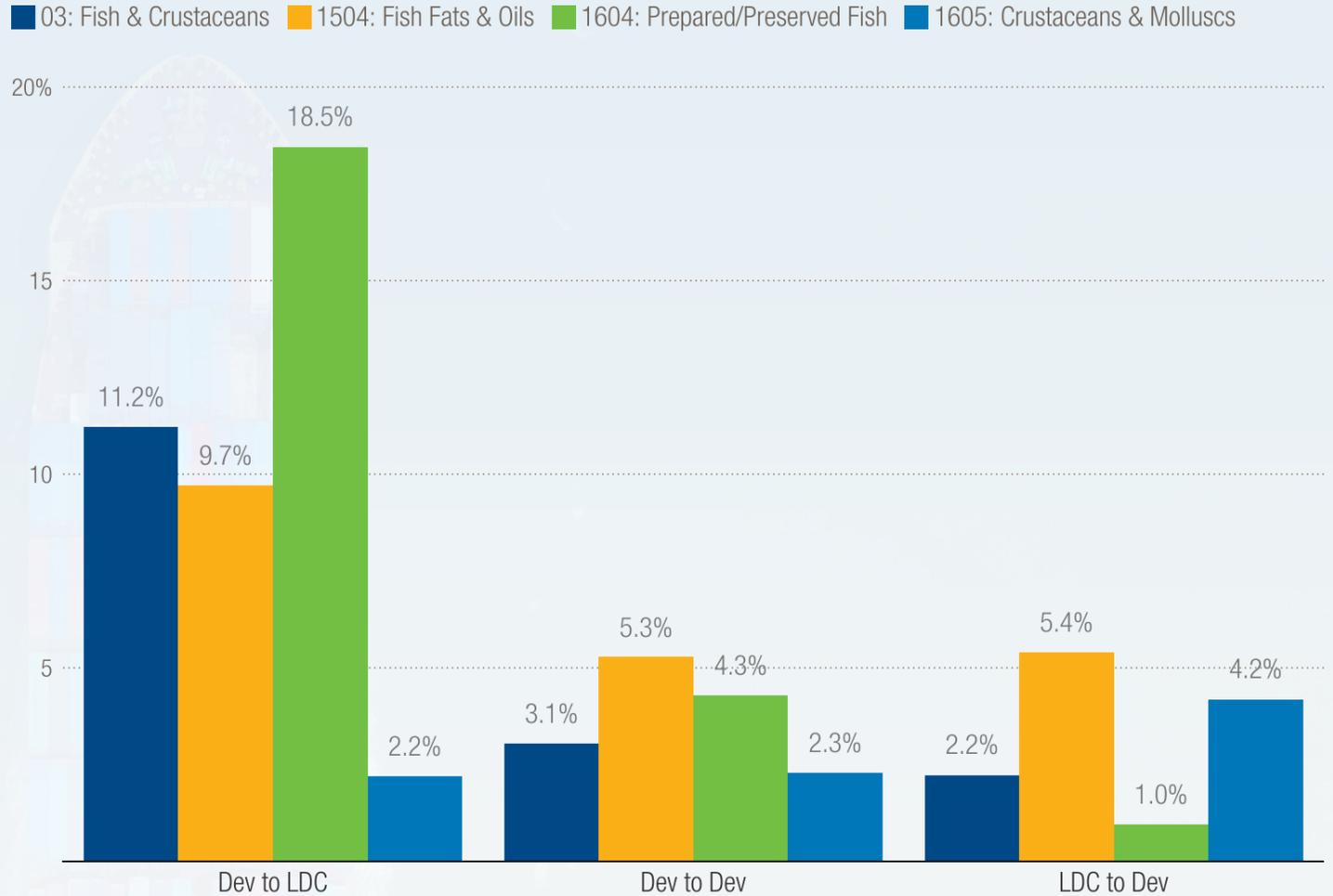
Growth in South-South fisheries trade is significantly outpacing global growth, both in primary fisheries and processed seafood exports.

➤ **Except for LDCs, applied tariffs on fisheries among developing economies are low**

➤ **Potential to develop operations through South-South trade**

➤ **South-South tariffs on fisheries exceed North-South tariffs**

Weighted Average Tariffs on Marine Products (HS code) by Destination, 2023 (%)

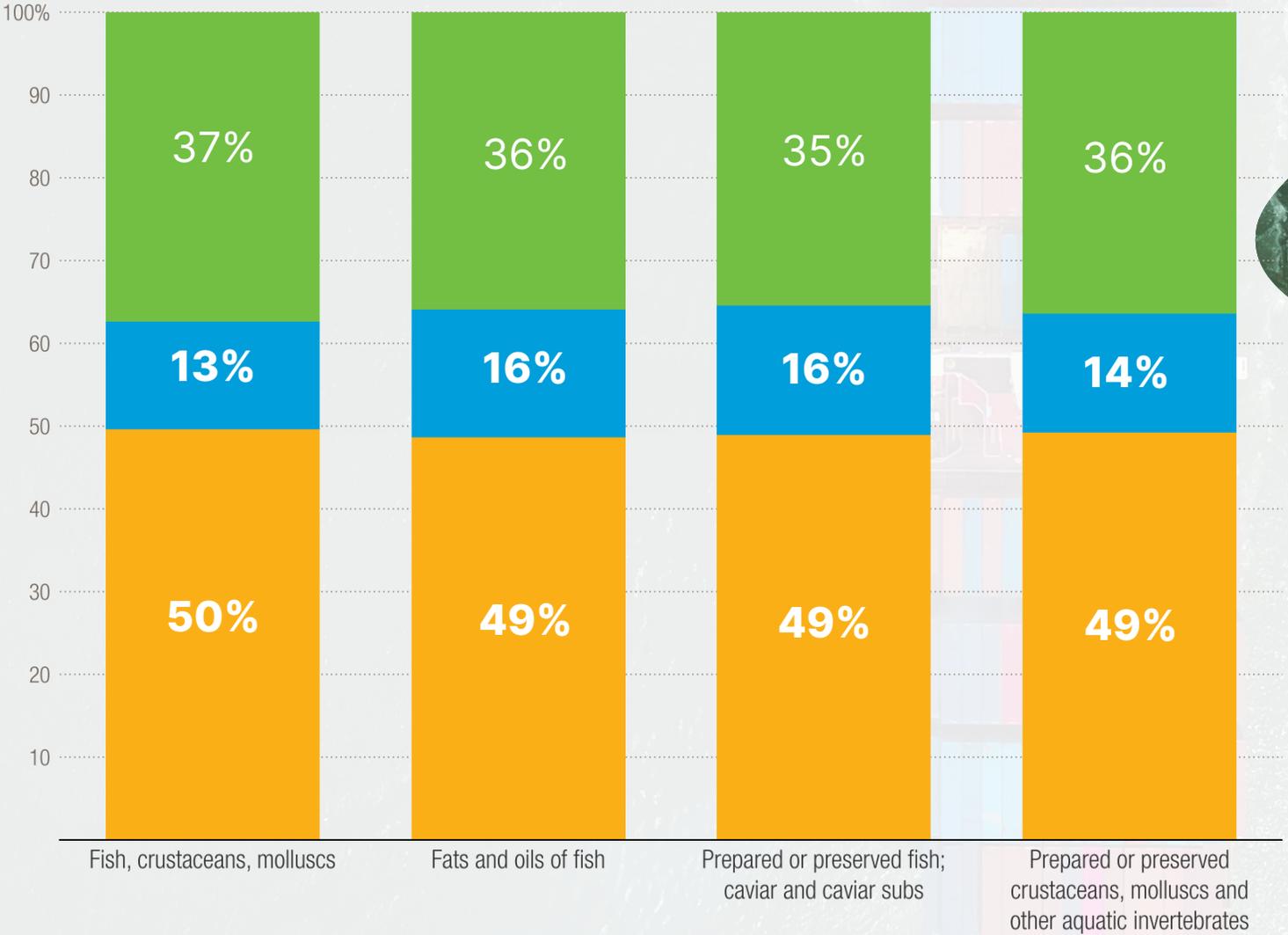


Source: UNCTAD, 2025 based on WITS, 2025

Note: Weighted Average Effectively Applied Tariffs (AHS) for the year 2023. Dev refers WTO Developing members (59) excl. LDCs & BC<35% excluding Least Developed Countries (LDCs) member and developing economies whose binding coverage in terms of tariffs is less than 35 per cent. LDC refers WTO LDC members (31). High Income refers High-Income OECD members.

Share of Non Tariff Measures by sector among GSTP members (Developing economies)

Other Technical barriers to trade (TBT) Sanitary and phytosanitary measures (SPS)

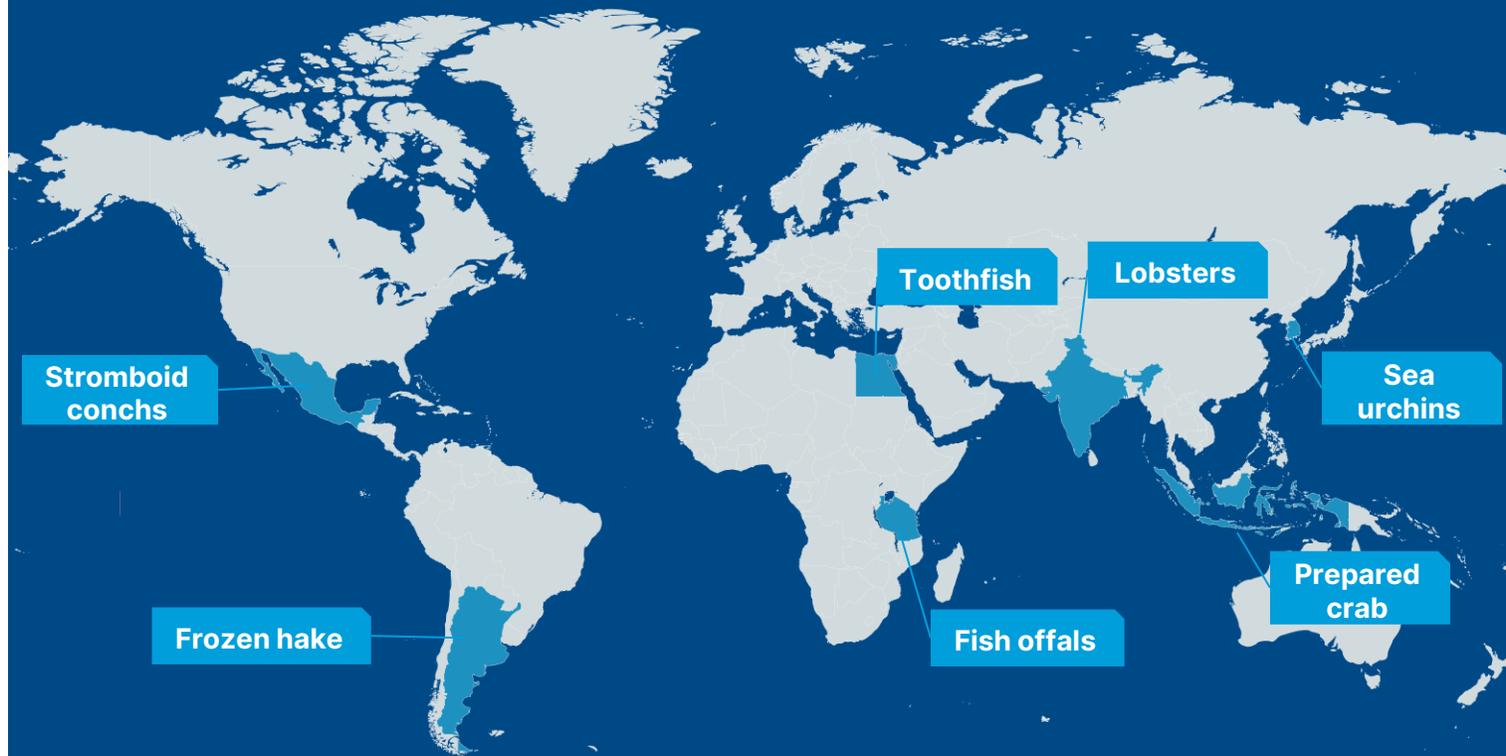


➤ **Most Sanitary and Phytosanitary measures amongst GSTP members apply to all fish products (HS 03)**

Source: UNCTAD TRAINS, 2025
Note: GSTP: Global System of Trade Preferences among Developing Countries

Country	RCA	Product
Argentina	28	Frozen hake (<i>Merluccius</i> spp., <i>Urophycis</i> spp.)
Brazil	8	Fresh bigeye tunas
Cameroon	3	Smoked fish
Chile	141	Toothfish fillets
Ecuador	110	Dogfish and other sharks
Egypt	163	Fresh or chilled toothfish (<i>Dissostichus</i> spp.)
Guyana	66	Frozen fish other than cod, haddock, coalfish, hake, Alaska pollack, blue whittings
India	10	Lobsters
Indonesia	16	Prepared or preserved crab
Malaysia	24	Stromboid conchs
Mexico	13	Stromboid conchs
Morocco	118	Processed sardines
Mozambique	612	Rock lobsters and other sea crawfish
Nicaragua	439	Frozen stromboid conchs
Nigeria	103	Crustaceans
Pakistan	29	Molluscs; clams, cockle, ark shells
Peru	43	Prepared or preserved anchovies
Philippines	39	Processed crab
Republic of Korea	79	Sea urchins
Singapore	12	Frozen swordfish fillets (<i>Xiphias gladius</i>)
Sri Lanka	232	Lobsters
Thailand	18	Shrimps and prawns
Trinidad and Tobago	855	Fresh or chilled toothfish (<i>Dissostichus</i> spp.)
Tunisia	38	Molluscs and snails
United Republic of Tanzania	229	Fish offal, fish heads, tails, and maws
Uruguay	22	Frozen toothfish

➤ **Developing economies have comparative advantages in different species, leading to complementary trade.**



The Global System of Trade Preferences (1988) can expand sustainable extra Regional and South-South Trade



Three “rounds” of GSTP negotiations & 42 Participants



Legally covered by the **Enabling Clause**
Exempted from GATT MFN principle



Rules of origin
Based on value added (50%)



Preferential Tariff Reduction Scheme
Includes other tools for co-operation among developing countries



Concession extended to all (negotiating) GSTP participants, not to non-members (conditional MFN)



Scope of cooperation also includes
Non-tariff measures, Medium and long-term contracts, Sectoral agreements long-term

Opportunities offered by GSTP Articles

4a&b

Arrangements on tariffs

E.g. Expanded market access through tariff reduction

4c

Arrangements on NTMs

E.g. Mutual recognition of catch certificates and reporting requirements

4d

Direct trade measures

E.g. **Supply contracts** to increase the security of supplies for importers and the stability of the demand for exporters

4e

Sectoral Arrangements

E.g. **Sectoral cooperation on services** for improving the environmental sustainability of fisheries

UNCTAD Sustainable Ocean Economies Projects

Ocean Economy and Trade Strategies (OETS)

- Supports coastal developing countries in maximizing economic benefits from the **sustainable use** of marine resources, underpinned by legal and institutional frameworks.
- Already implemented in Barbados, Belize and Costa Rica with DOALOS.

Blue BioTrade (BBT)

- Promote exports of marine biological resources in line with social, economic and environmental sustainability criteria, as defined by the UNCTAD BioTrade Principles and Criteria.
- Already implemented in the **Organization of Eastern Caribbean States** (OECS) with CITES, resulting in product assessments, a regional action plan, and enhanced export opportunities.
- Combines UNCTAD's expertise on the ocean and biodiversity





Thank you