

# PREFERENTIAL ACCESS UNDER TRADE AGREEMENTS FOR FISHERIES AND AQUACULTURE PRODUCTS AND RELEVANT INFORMATION AVAILABLE

## MAC Executive Committee Working Group 2: EU Markets

Brussels, 7 June 2023

Marcio Castro de Souza  
Senior Fishery Officer (International Trade)  
marcio.castrodesouza@fao.org

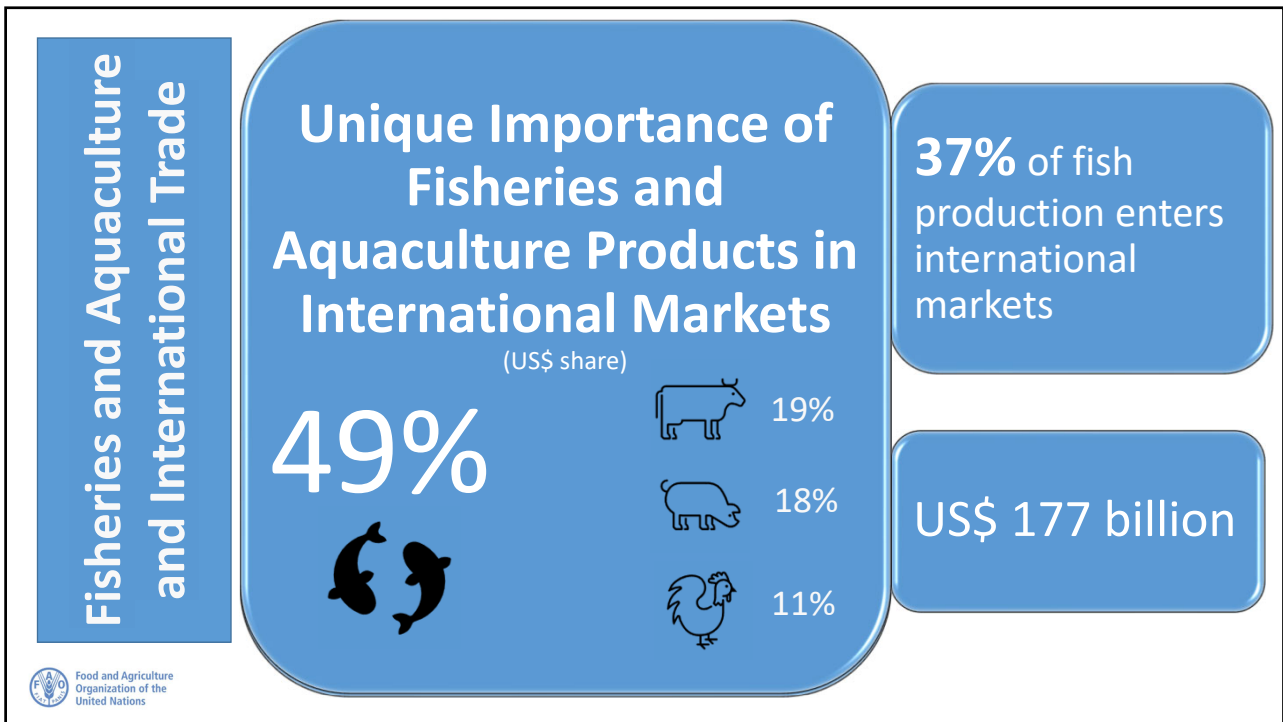


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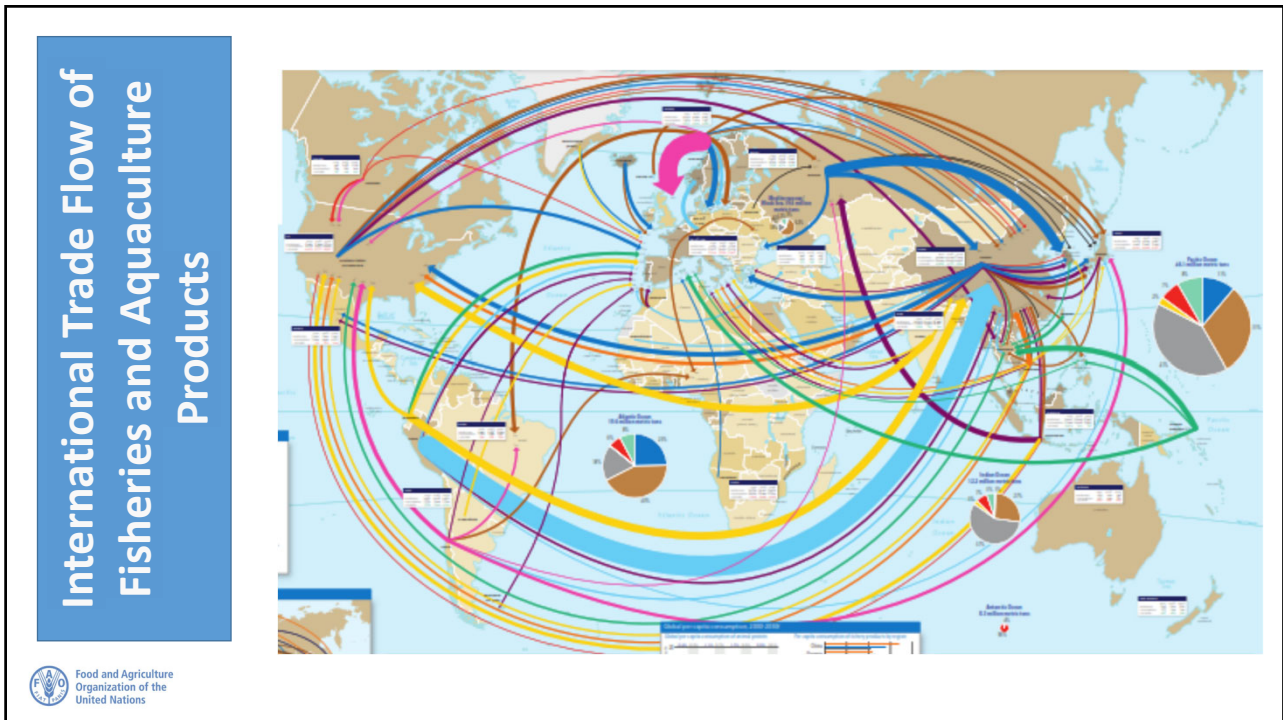
# A True International Commodity with an Inclusive Participation of Countries



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# Preferential Market Access



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## Tariffs and Market Access

### Types of Tariffs

- Applicable tariffs
- Preferential tariffs

### Preferential tariffs

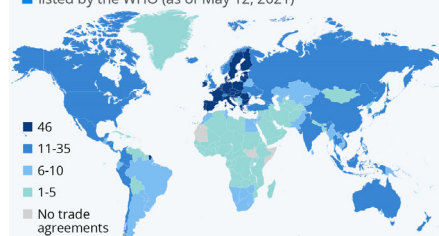
- Huge impact on market access
- Tariffs can be reduced from 20-10% to 0%

### Types of preferential tariffs

- Granted
- Negotiated

### Which Countries Have the Most Trade Agreements?

Active regional trade agreements as listed by the WHO (as of May 12, 2021)



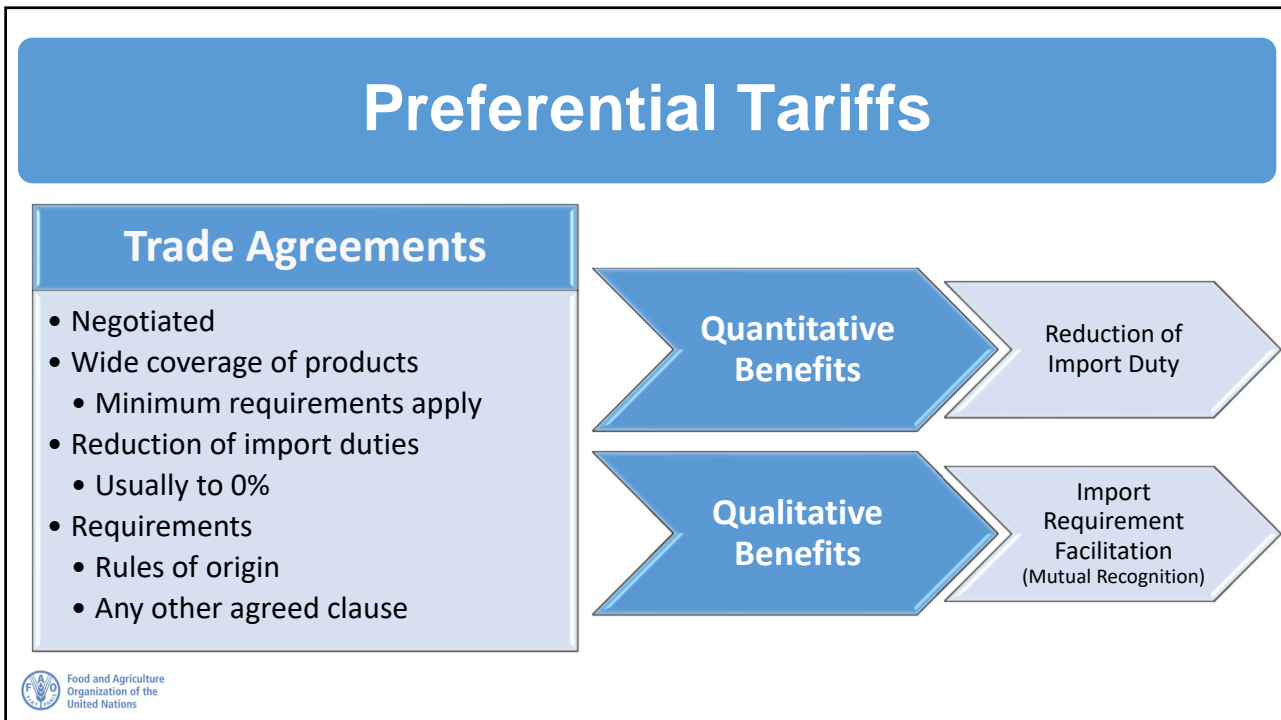
Agreements made as a pre-existing group counted individually for each country  
Source: WTO



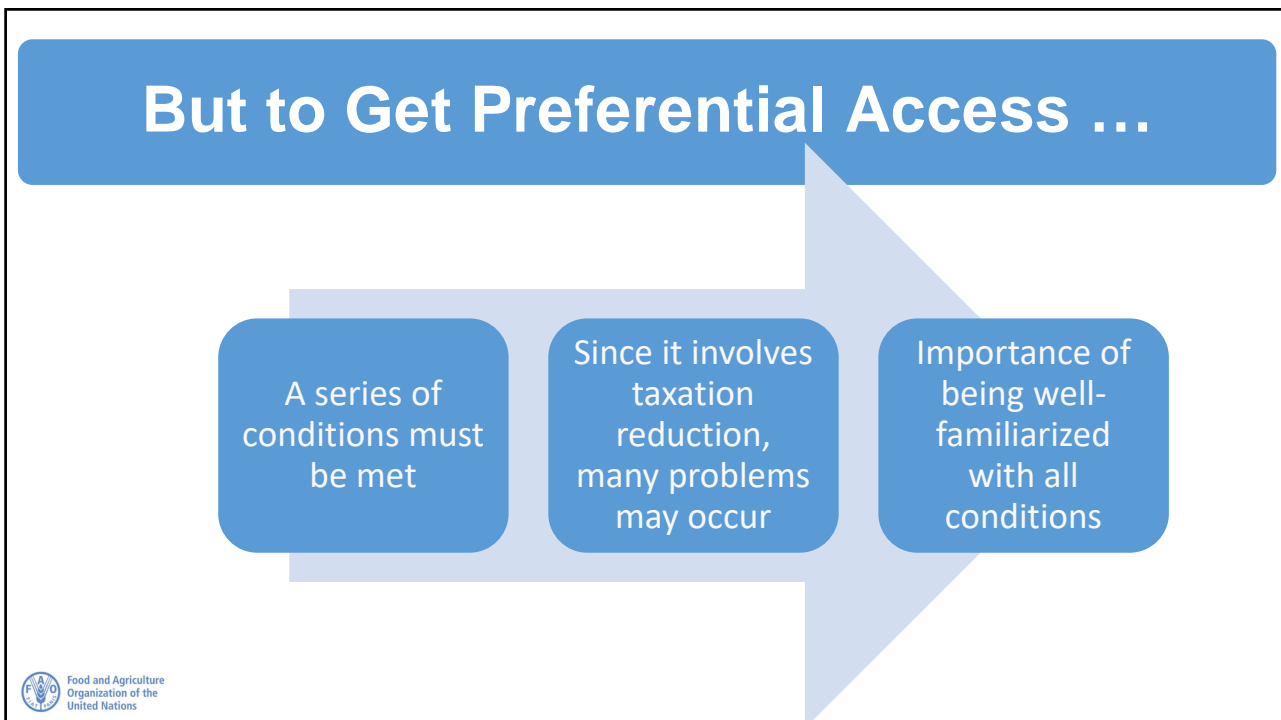
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[Evolution of Trade Agreements](#)

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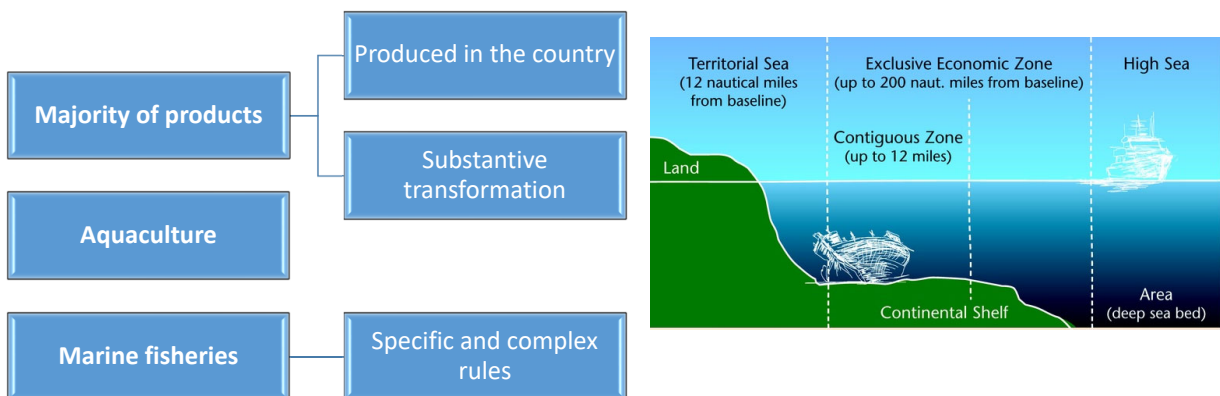
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# In preferential access, how to determine the origin of a product?

## INTERNATIONAL TRADE AGREEMENTS The Origin of Products



## Preferential Trade – Rules of Origin

### Territory Rule

- Live animals born and raised there
- Products from live animals raised there
- Products obtained by hunting or fishing conducted there
- Products of sea fishing and other products taken from the sea outside the territorial waters of countries A or B by their vessels

### Vessel Rule

- Registered or recorded in countries A or B
- Sailing under the flag of country A or B
- Owned by nationals of country A or B
- Masters and officers from country A or B
- Minimum percentage of crew being nationals of country A or B

## Traditional and “Modern Clauses” in Trade Agreements

## Common Trade Agreement Clauses

### Traditional Trade Agreements

- Overall clauses of the trade agreement to get the tariff reduction
- Concentrated on trade clauses
  - Rules of origin
  - Tariff reduction

### New Generation of Trade Agreements

- Introduction of non-trade clauses to allow the tariff reduction to be applied
- Clauses with a global interest but beyond the traditional trade analysis
  - Environmental clauses
  - IUU fishing
  - Fisheries subsidies

## The Comprehensive Agreement for Progressive Trans-Pacific Partnership (CPTPP)

### Trade Agreement Coverage

- Countries  
Australia, Brunei  
Darussalam, Canada,  
Chile, Japan, Mexico,  
New Zealand, Peru,  
Singapore, Viet Nam and  
expanding!
- 14% of global production
- Intra CPTTP trade: US\$  
6.3 billion

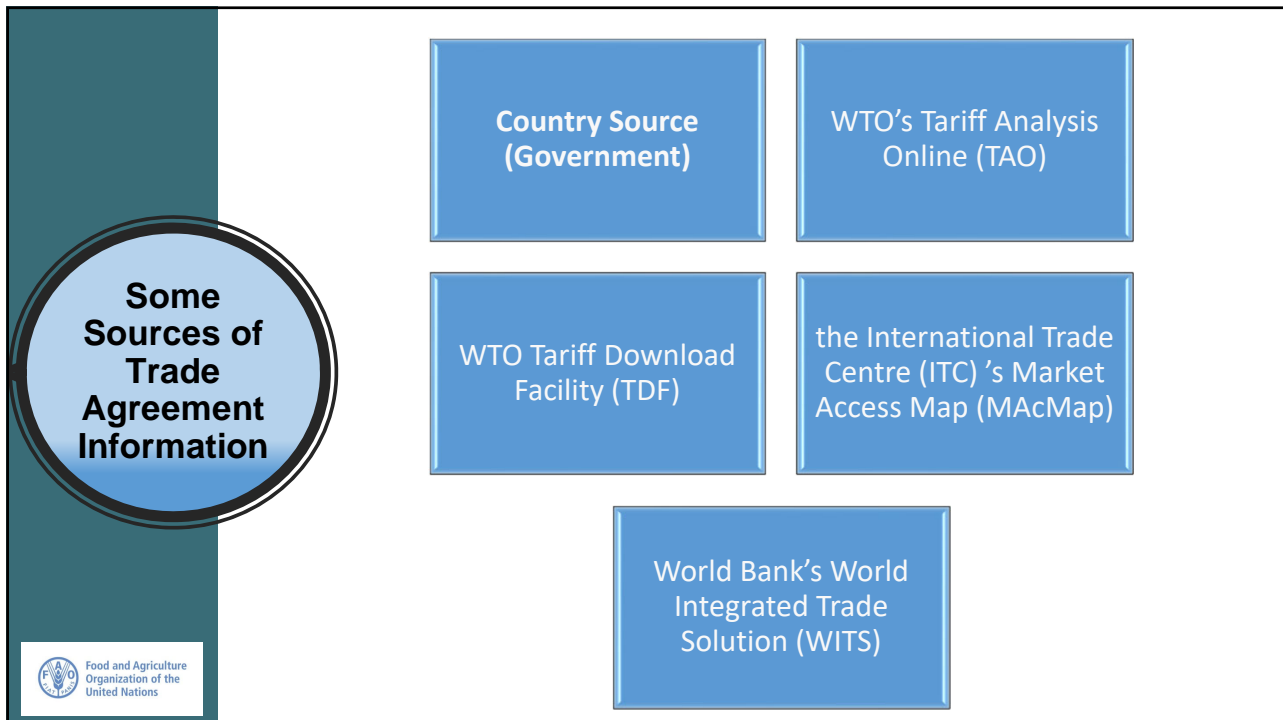
### New Generation Clauses

- The protection of the ozone layer
- Ship pollution
- Biodiversity conservation
- Invasive species
- Illegal wildlife trade
- Marine capture fisheries
- Fisheries management
- Conservation measures
- Fisheries subsidies

# Non-Traditional Clauses are becoming the “New Normal” of Trade Agreements

# What are the Existing Main Sources of Preferential Access Information?





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The complex block features a blue circle on the left containing the text "But they do have limitations". To the right of this circle are three blue horizontal bars, each containing a heading followed by a bulleted list. The first bar has the heading "There is a wide variation in" and a list with three items: "usability", "features", and "level of detail". The second bar has the heading "Importance of the exporter compliance with" and a list with three items: "Rules of Origin", "Sustainability clauses", and "product coverage". The third bar has the heading "The importance of the specific nuances of the fisheries and aquaculture industry" and a list with two items: "the vessel flag provisions," and "the possibility of the product being captured or farmed in various UNCLOS maritime zones". In the bottom left corner of the slide, there is a small logo for the Food and Agriculture Organization of the United Nations.

**But they do have limitations**

**There is a wide variation in**

- usability
- features
- level of detail

**Importance of the exporter compliance with**

- Rules of Origin
- Sustainability clauses
- product coverage

**The importance of the specific nuances of the fisheries and aquaculture industry**

- the vessel flag provisions,
- the possibility of the product being captured or farmed in various UNCLOS maritime zones

Food and Agriculture Organization of the United Nations

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## The FAO Regional Trade Agreement on Fisheries and Aquaculture Products

### Basic Principles

User-Friendly Format

Nuances of the Fisheries and Aquaculture Sector

Comprehensive Description of Products

HS 0303.49	
HS Code	Other tunas, frozen
Comprehensive Description	<p>Tunas (of the genus <i>Thunnus</i>), frozen; <b>excluding</b> albacore or long-finned tunas, yellowfin tunas, skipjack or stripe-bellied bonito, bigeye tunas, Atlantic bluefin tunas, Pacific bluefin tunas and southern bluefin tunas, and also excluding fillets and other meat (whether or not minced), livers, roes, milt, fins, heads, tails, maws and other edible offal.</p>

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## The FAO Regional Trade Agreement on Fisheries and Aquaculture Products

### UNCLOS Maritime Zones

### Product Coverage

	Live	Fresh, chilled	Frozen	Dried, salted, in brine, smoked	Fillets: fresh, chilled, frozen	Fillets: dried, salted, in brine, smoked	Flour, meal, pellets	Prepared, preserved	Units for human consumption
Fish	0301	0302	0303	0305	0304	0306	0308 50 201	0304	0511 91
Crustaceans	0306 30	0306 30	0306 50	0306 90			0308 90 201	0305	0511 91
Molluscs	0307	0307	0307	0307			0308 90 201	0305	0511 91
Other Aquatic Invertebrates	0308	0308	0308	0306			0308 90 201	0305	0511 91
Seaweed, Algae	1212 94	1212 94							
Oils	1504 10 10 10 10 10 10 10								
Source	2303 90								

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		Live	Fresh, chilled	Frozen	Dried, salted, in brine, smoked	Fillets: fresh, chilled, frozen	Fillets: dried, salted, in brine, smoked	Flours, meals, pellets	Prepared, preserved	Unfit for human consumption
Fish		0301	0302	0303	0305	0304	0305	0309.10 or 2301	1604	0511.91
Crustaceans		0306.30	0306.30	0306.10	0306.90			0309.90 or 2301	1605	0511.91
Molluscs		0307	0307	0307	0307			0309.90 or 2301	1605	0511.91
Other Aquatic Invertebrates		0308	0308	0308	0306			0309.90 or 2301	1605	0511.91
Seaweed, Algae	1212 or 1302									
Oils	1504 1516.10 1517.90									
Sauce	2103.90									



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**Since it is a yet-to-be-developed database, suggestions are more than welcome**



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# Additional Information on Fisheries and Aquaculture and Regional Trade Agreements

April 2022 COFFT/XVIII/2022/6



Food and Agriculture Organization of the United Nations

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

Organización de las Naciones Unidas para la Alimentación y la Agricultura

Organizzazione delle Nazioni Unite per l'alimentazione e l'agricoltura

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COMMITTEE ON FISHERIES

SUB-COMMITTEE ON FISH TRADE

Eighteenth Session

Written Correspondence Procedure: 8 April to 8 May 2022  
Virtual Plenary sessions: 7, 8, 9 and 20 June 2022

TRADE AGREEMENTS AND MARKET ACCESS FOR FISHERIES AND AQUACULTURE PRODUCTS

Executive Summary

As requested by Members, this document complements document COFFT/XVII/2019/10 and extends the analysis to three additional trade agreements. These agreements were selected because of their relevance to fisheries and aquaculture and so as to be representative of a broad range of levels of development. The agreements covered are: (1) the Regional Comprehensive Economic Partnership, (2) the China-Peiu Free Trade Agreement, and (3) the African Continental Free Trade Area. Each section focuses on one of these agreements, providing a general overview of the agreement in question, its relevance to fisheries and the main provisions relevant to trade in fisheries and aquaculture products. Both traditional market access issues, such as tariffs and non-tariff measures (NTMs), and select non-traditional areas, such as environmental provisions or specific cooperation mechanisms, are covered.

[Online access](#)

October 2019 COFFT/XVII/2019/10



Food and Agriculture Organization of the United Nations

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

Organización de las Naciones Unidas para la Alimentación y la Agricultura

Organizzazione delle Nazioni Unite per l'alimentazione e l'agricoltura

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COMMITTEE ON FISHERIES

SUB-COMMITTEE ON FISH TRADE

Seventeenth Session

Vigo, Spain, 25–29 November 2019

RECENT TRADE AGREEMENTS AND MARKET ACCESS FOR FISH AND FISHERY PRODUCTS

Executive Summary

This document provides an overview of the main Regional Trade Agreements' (RTAs) provisions applying to trade in fish and fishery products. Some of the most ambitious deep integration agreements concluded recently are presented, covering both traditional market access issues, including tariffs and non-tariff barriers, but also some of the non-traditional areas such as environmental provisions and subsidies disciplines.

[Online access](#)

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[www.globefish.org](http://www.globefish.org)  
Trade and Markets Information

## GLOBEFISH Resources

Food and Agriculture Organization of the United Nations

China GLOBEFISH Market Profile - 2020

COUNTRY GROUP

Population: 1 412 100 000 (31st)

Length of coastline: 14 232 km

Average GDP growth: 8.3%

GDP per capita: USD 10 500

Trade in fish and fish products

GDP from fisheries: N/A

Fish available for consumption: 38.8 kg/capita

Imports of fish and fish products - 2020: USD 14 881 473 060

Agricultural GDP from fisheries: N/A

Fisheries and aquaculture production: Total 62 840 352 tonnes

Exports of fish and fish products - 2020: USD 18 481 738 200

Fisheries: 21%

Aquaculture: 79%

Profile compiled by GLOBEFISH - March 2023

Production and Trade Breakdown

Production by volume

Imports by value

Exports by value

Production - Top 10 Species (Volume)

1st	Green carp (White stria)	5 071 380
2nd	Cleaved system net	5 424 632
3rd	Japanese carp	4 217 640
4th	Silver carp	3 812 899
5th	Marine fish net	3 648 675
6th	Bighorn carp	3 130 301
7th	Common carp	2 896 609
8th	Common eel	2 748 519
9th	Red swamp crayfish	2 305 699
10th	Whiting shrimp	1 902 937

China 2020

Imports - Top 10 Products (Value)

1st	Shrimp, prawns	1 951 000 410
2nd	Frozen, ready, packed, fish or aquatic invertebrates	1 865 878 670
3rd	Frozen, other sea crustaceans	1 197 020 330
4th	Fish, other than species in 0202	823 101 570
5th	Cod	777 061 040
6th	Fish, excluding fillets, heads and bones	630 754 880
7th	Spinal cutfish	579 153 440
8th	Cod	563 954 720
9th	Lobsters	559 374 260
10th	Catfish	426 627 400

Exports - Top 10 Products (Value)

1st	Spinal cutfish	1 865 878 670
2nd	Fish, other than species in 0202	823 101 570
3rd	Spinal cutfish	777 061 040
4th	Fish, other than species in 0202	630 754 880
5th	Eels	579 153 440
6th	Frozen fillets	563 954 720
7th	Tunas, skipjack, bonito	559 374 260
8th	Alaska Pollock	426 627 400
9th	Fish	347 953 780
10th	Shrimp, prawns	185 000 000



GLOBEFISH European Price Dashboard

Species groups: Filters

Reset filters

Common name	Description	Product form	Grading	Price per kg	% Change Month
Angler	Fresh	Chunks		€ 11.80	-1%
Angler	Fresh	Chunks		€ 12.15	-1%
Angler	Fresh	Whole		€ 4.12	-1%
Angler	Fresh	Whole		€ 4.23	-1%
Angler	Fresh	Whole		€ 4.75	-1%
Angler	Fresh	Whole		€ 6.02	-1%
Angler	Fresh	Whole		€ 11.00	-1%
Atlantic salmon	Fresh	Whole		€ 20.00	-1%
Atlantic salmon	Fresh	Head off		€ 10.00	-1%
Atlantic salmon	Fresh	Head off		€ 12.22	-1%
Atlantic cod	Cryoshed	Block		€ 1.00	-1%

Price per kg % Change Month

3/16/2021 4/24/2022

33%

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# Sustainable Fish Trade For Today and Tomorrow



[www.linkedin.com/in/mcdesouza](http://www.linkedin.com/in/mcdesouza)

Marcio Castro de Souza  
Senior Fishery Officer (International Trade)  
marcio.castrodesouza@fao.org

