



Session 7

Market access from a small-scale operator perspective

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Overview

1. Introduction to Small-Scale Fisheries (SSF)
2. Global commitments to enhancing international trade and markets for SSF
3. The FAO Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication (SSF Guidelines)
 - Focus on chapter 7 – Value chains, post-harvest and trade
4. FAO knowledge products to support market access and trade for SSF
 - The value of small-scale fisheries in production and trade
5. Mentimeter
6. Open discussion
 - Main challenges involving integrating small-scale fishers into international markets
 - How can FAO best support this integration?

SSF

No definition,
but shared
characteristics





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UNIVERSITY



Illuminating Hidden Harvester

The contributions of small-scale
fisheries to sustainable
development

The contributions of small-scale fisheries to sustainable development

A snapshot of findings from the Illuminating Hidden Harvester (IHH) report

Harvesting aquatic foods

Total global fisheries catch is **92 million tonnes**¹

37 million tonnes
small-scale
fisheries (SSF)



55 million tonnes
large-scale
fisheries

68%
marine catch



32%
inland catch



Supporting livelihoods and jobs

492 million people

depend at least partially on engagement in SSF²

60 million
employed in SSF
part or full time

53 million
engaged in
subsistence fishing

379 million
additional
household members

Accounts for **90%** of capture fisheries employment

USD 77 billion³

total revenues from first sale of SSF catch⁴

USD 58 billion
marine SSF catch

USD 19 billion
inland SSF catch

Shared governance

Fishers and fishworkers see
themselves as **active contributors**
to the SSF Guidelines

Of 424 SSF producer organisations:

99% have harvesting and sustainable
fisheries management goals⁵

60% have human well-being goals⁶

Co-management is likely implemented⁹
for **20%** of SSF catch¹⁰

Valuing women's contributions

45 million women

participate in SSF^{2,5}

4 out of 10 people in SSF are women

15%
Pre-harvest

19%
Commercial
harvest

50%
Post-harvest

45%
Subsistence
fishing

Providing essential nutrition

**Fish is rich in
micronutrients**
essential for good health
and development

Nutrient values vary
greatly among fish types
**Small fish are
especially nutritious**



SSF landings⁸ could provide:

987 million women

globally with 50%
of the recommended
nutrient intake of
omega-3 fatty acids⁷



477 million women

globally with over 20%
of the recommended
nutrient intake of calcium,
selenium and zinc⁷

¹Average in 2013–2017 extrapolated from 58 IHH country and territory case studies.
²Extrapolation from 78 national household-based surveys for 2016, including full- and part-time employment along the value chain (numbers rounded).
³Extrapolated from 58 IHH country and territory case studies.
⁴From first sale of SSF catch (2013–2017).
⁵Supported by knowledge and insights of 28 gender advisors.

⁶Landings include only fish retained by fishers for consumption, sale or trade, whereas catch includes all fish caught.
⁷Based on predictive nutrient modelling by the IHH team and partners.
⁸Based on global IHH survey of 717 SSF organisations.
⁹Based on perceived high participation of fishers, which is used as a proxy for implementation.
¹⁰Based on governance data on marine and inland catch for 58 countries and territories, representing about 50% of the global catch.

IHH partners



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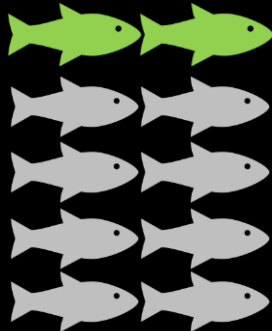
Funded by





At least 40% of global catch from SSF

2 out of 10 tonnes co-managed



Almost 500 mil people at least partially dependent on SSF



40% of SSF labour is conducted by women



SSF landings could provide 477 mil women with 20% of recommended nutrient intake of calcium, selenium and zinc

IHH: Landed economic value

Global annual landed economic
value in nominal terms:

USD 77.2 billion



Marine small-scale fisheries:

USD 58.1 billion

+

Global annual landed economic
value adjusted by inflation:

USD 68.5 billion



Inland small-scale fisheries:

USD 19.0 billion

Summary results of the analysis of
global landed economic value of
small-scale fisheries,

- extrapolated from 58 IHH country and territory case studies
- average annual values, 2013–2017

Small-scale fisheries exports: evidence from 26 countries

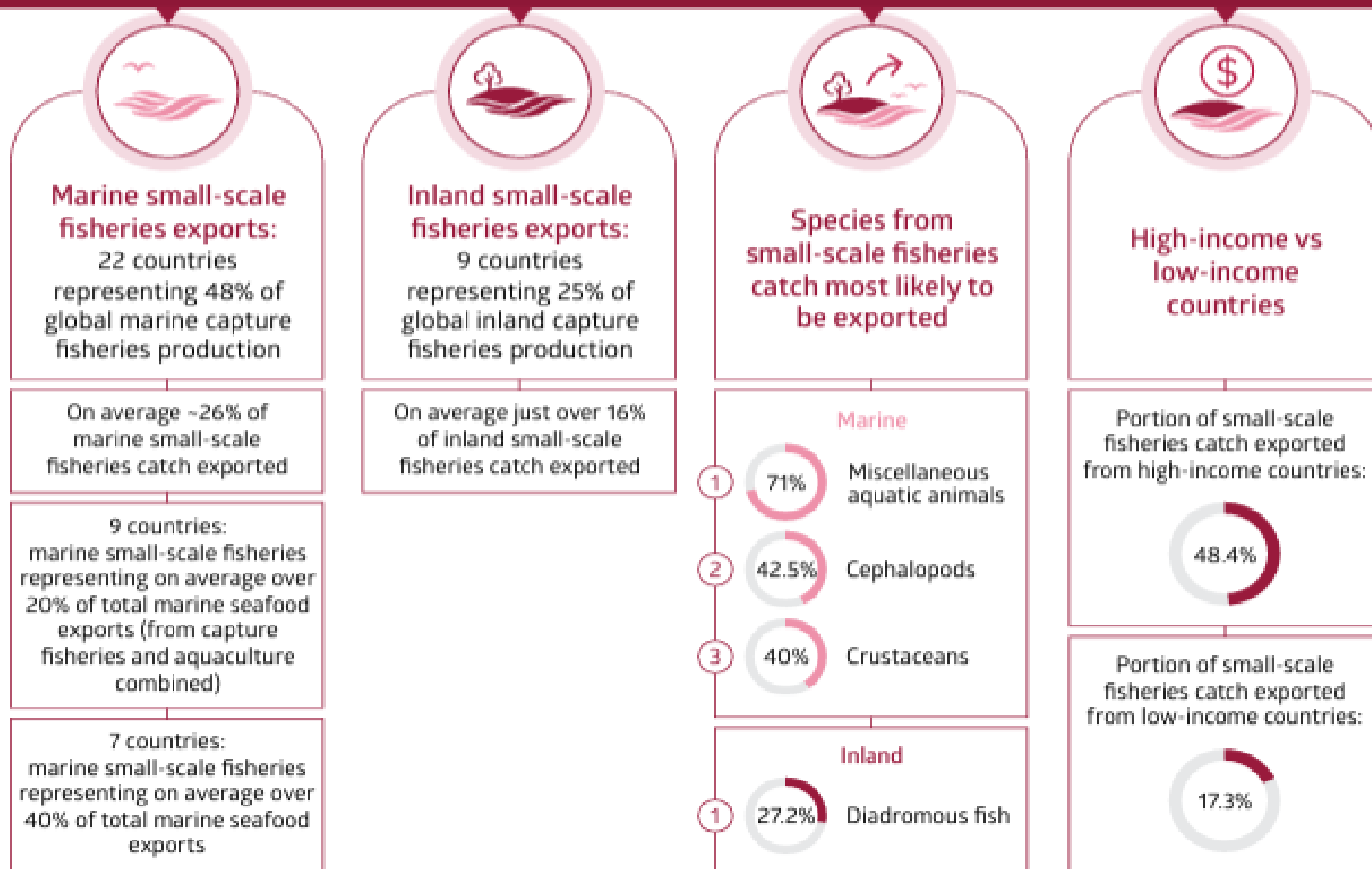


Table 5.9 Marine small-scale fisheries export volumes for 13 IHH country and territory case studies, as percentage of total marine aquatic food export volumes reported to FAO

Country	Years	Marine small-scale fisheries exports as % of total marine aquatic food export volumes ^a (average, by quintile)
Asia		
Philippines	2013, 2014, 2015, 2016, 2017	(20–40%)
Indonesia	2013, 2014, 2015, 2016, 2017	(20–40%)
Maldives	2014, 2015, 2016, 2017	(> 100%)

Employment in small-scale fisheries in Indonesia

	Pre-harvest	Harvest		Post-harvest		Total
				Processing	Trading	
	Marine and inland	Inland	Marine	Marine and inland	Marine and inland	
National Labour Force Survey 2020	100.000	311.000	1.942.000	250.000	714.000	3.317.000

Global commitments to enhancing
international trade and markets for SSF

Global commitments to enhancing international trade and markets for SSF

COFI and COFI:FT

- Recognized importance of supporting SSF to overcome challenges complying with market access requirements, including certification schemes
- Highlighted the importance of achieving equitable market access and distribution of benefits for small-scale fishers
- Underscored the need to reduce post-harvest losses and improve processing and handling techniques in SSF

CFS 2016 High-Level Forum

- *Connecting Smallholders to Markets*



Global commitments to enhancing international trade and markets for SSF

Contribute to achievement of the 2030 Agenda for Sustainable Development

- SDG Target 14.b – Provide access for small-scale artisanal fishers to marine resources and markets
- SDG Target 2.3 – ...double the...productivity and the incomes of small-scale food producers, particularly women, indigenous peoples,...and fishers, including through secure and equal access to...resources and inputs, knowledge, financial services, markets and opportunities for value addition



SSF Guidelines



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Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries

In the Context of Food Security
and Poverty Eradication

SSF Guidelines

- First globally agreed instrument entirely dedicated to small-scale fisheries
- Developed via a bottom up approaching via a series of regional workshops
- Negotiated by the members of FAO
- Endorsed by the FAO Committee on Fisheries in 2014.
- This summer the world will celebrate the 10th anniversary of the SSF Guidelines

Beyond fisheries

- Grounded in a human rights-based approach
- Wholistic approach to sustainable development - social, economic and environmental development
- Emphasis on gender equality

Part 1

Introduction

1. Objectives
2. Nature and scope
3. Guiding principles
4. Relationship with other international instruments

Part 2

Responsible fisheries and sustainable development

5. Governance of tenure in small-scale fisheries and resource management
 - 5a. Responsible governance of tenure
 - 5b. Sustainable resource management
6. Social development, employment and decent work
7. Value chains, post-harvest and trade
8. Gender equality
9. Disaster risks and climate change

Part 3

Ensuring an enabling environment and supporting implementation

10. Policy coherence, institutional coordination and collaboration
11. Information, research and communication
12. Capacity development
13. Implementation support and monitoring

Value chains, post-harvest
operations and trade

Build Capacity of Individuals, Strengthen Organisations and Empower Women

Challenges:

- SSF actors are not recognised in decision-making processes
- Women are marginalised and discriminated against - unequal access to infrastructure, technology, finance, education and services
- Limited organisational capacity inhibits fishworkers to engage in decision making



The importance of social organisations in SSF governance

- To participate in co-management
- Infrastructure maintenance
- Capacity to engage with international markets



Women's role in value chain is recognised and respected

- Facilities and improved work environment that enable women to enhance livelihoods
- Reduce post-harvest loss and waste
- Value addition



Provide infrastructure and capacity for SSF actors

- To enhance product quality and reduce loss and waste
- To bolster trade and increase value of SSF production

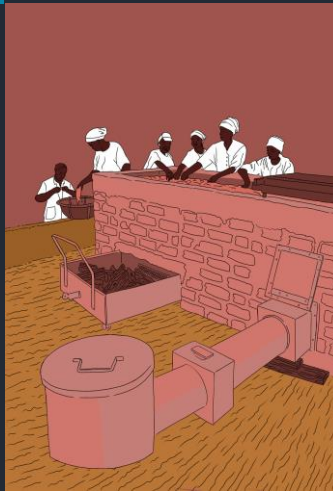




Reduce Post-Harvest Losses and Add Value to Small-scale Fisheries Production

Challenges

- Lost income to fishers, processors and traders
- Contributes to food insecurity
- Increases pressure on resources



Avoid post-harvest losses and waste and seek ways to create value addition

- Utilize appropriate technologies, including traditional and innovative
- Disseminate good practices
- Promote value addition
- Enable access to high value markets





Facilitate Sustainable Trade and Equitable Market Access

Challenges

- Sustainable trade is conditional on there being resource and food security management practices in place
- Meeting regulations and standards
- Unequal power relations often exist between different actors along the value chain



Training and capacity development of individuals and organizations on market functions

- Understanding of market dynamics and numeracy
- Trade policies, including tariffs and non-tariff measures
- Certification and eco-labelling



Provide access to financial services

- Credit and microfinance
- Savings, payment and remittance services



FAO knowledge products to support
market access and trade for SSF

- 9 case studies
- Rich and diverse selection of experiences
- Illustrate SSF Guidelines recommendations
- Showcase applied practices and successful initiatives
- Present analysis of enabling conditions and discuss challenges and opportunities
- Inspire SSF proponents to action



Securing sustainable small-scale fisheries

Showcasing applied practices in value chains,
post-harvest operations and trade



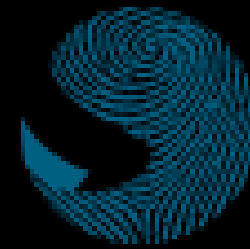
6. Fair Trade: Certification of a yellowfin tuna handline fishery in Indonesia



Zheng et al. *Fair Trade*



Yayasan
Masyarakat dan Perikanan
Indonesia



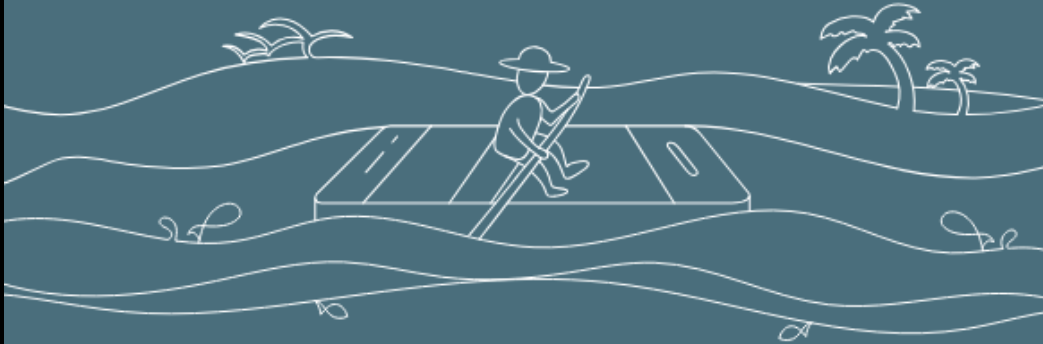
ANOVA
SEAFOOD

8. State-led fisheries development: Enabling access to resources and markets in the Maldives pole-and-line skipjack tuna fishery





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Information and communication
technologies for small-scale
fisheries (ICT4SSF)

A handbook for fisheries stakeholders

In support of the implementation of the Voluntary
Guidelines for Securing Sustainable Small-Scale Fisheries
in the Context of Food Security and Poverty Eradication

ICT can help facilitate market access:

- Bridges gap between fishers and markets
- Can improve auction processes
- Facilitate traceability
- Can support data collection and analysis

Handbook provides some specific examples on the application of ICT in fisheries management and trade

<https://doi.org/10.4060/cb2030en>

NPOA-SSF

- Comprehensive, participatory approach to support small-scale fisheries in line with the SSF Guidelines
- Indonesia has conducted some preliminary activities to develop an NPOA-SSF

<https://doi.org/10.4060/cc9781en>

Developing and implementing a National Plan of Action for Small-Scale Fisheries (NPOA-SSF)

A manual in support of the implementation
of the Voluntary Guidelines for securing sustainable
small-scale fisheries in the context of food security
and poverty eradication

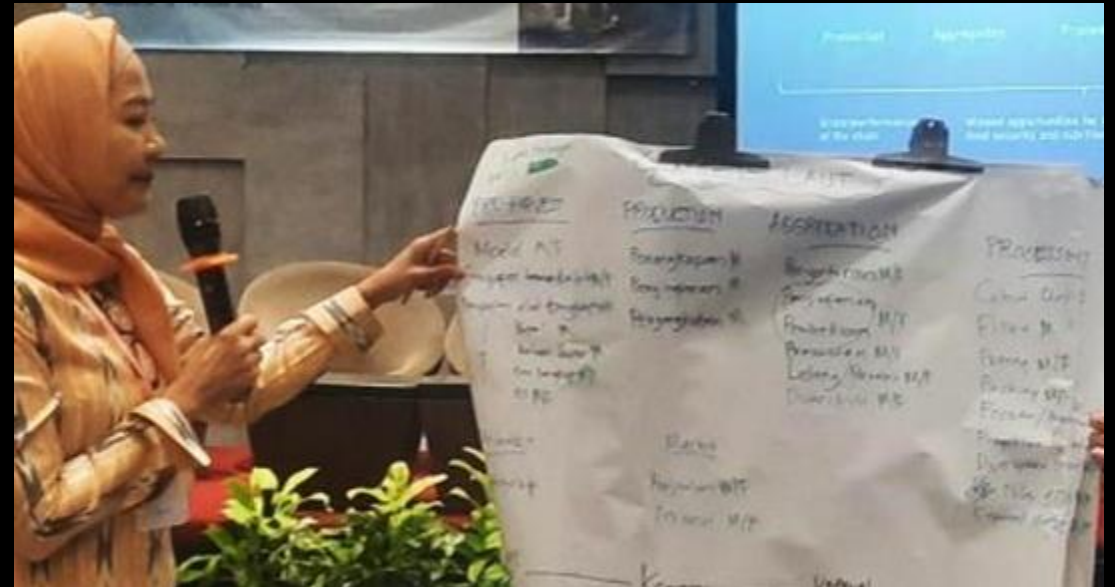


A fisherman in a red shirt and a grey bucket hat stands on a blue and red boat, holding a large catch of fish. The fish are silver with yellow eyes and are hanging from a string. The background shows a body of water and a distant shoreline with trees and hills. The text "Questions or comments?" is overlaid in white on the image.

Questions or comments?

PRACTICAL ACTIVITY

What are the main challenges for integrating small-scale fishers into international markets –
The case of Indonesia



What can be done to sustainably increase small-scale fisheries participation in international trade?

- Are there specific small-scale fisheries target species or products that could be supported in relation to international trade?
- Are there producer organizations that could be trained, e.g. by participating in trade fairs, in organizational and business development training?
- Are there any ways to increase access to market information – e.g. whatsapp groups, radio broadcast, specialized trade information channels?



fact.mg



Mentimeter

- Role of women not recognized and supported
- Lack of appropriate post-harvest infrastructure for processing and marketing
- Lack of (organizational capacities of) small-scale producer organizations
- Impact of international trade, e.g. competition from other fishery products or increased pressure on resources due to high market demand
- Unfair distribution of benefits from international trade, e.g. too little profit for small-scale fishers compared to processors, traders, importers, international companies etc.
- Insufficient access to market information, about prices, buyers, product type demand etc.
- Other

Discussion of results

Take home messages

- Commercial small-scale fisheries are crucial for the livelihoods of over 3.3 million people in Indonesia
 - Employment, food, culture, social cohesion, environmental stewardship
- Small-scale fisheries account for 20-40% of Indonesia's exports but face particular challenges
 - Lack of appropriate infrastructure
 - Lack of access to market information
 - Power imbalances along the value chain
 - Capacity of producer organizations
- Indonesia has taken important steps in supporting small-scale fisheries
- International guidance and knowledge can support further improvements, in line with global commitments signed up to by Indonesia

A photograph of a fish market scene. In the foreground, several large, silvery fish are laid out on a wooden table. A man in a light blue t-shirt and jeans is leaning over the table, looking at the fish. In the background, other people are working under a blue metal structure, and a body of water is visible. The text "Thank you" is overlaid in the center.

Thank you

www.fao.org/voluntary-guidelines-small-scale-fisheries/en/

SSF-Lex

PROTECTION AND EMPOWERMENT OF FISHERMEN, FISH RAISERS AND SALT FARMERS (Law of the Republic of Indonesia No. 7/2016 dated April 14, 2016)

BY THE GRACE OF GOD ALMIGHTY
THE PRESIDENT OF THE REPUBLIC OF INDONESIA,

- <https://ssfex.fao.org/>
- Legal and policy data base

